

M&M's V8 Rental Module

V2.x

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

POS User Manual

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Overview

This manual covers the use of the M&M Rental Module for 8-Series Retail Pro.

It begins with an explanation of Rental Plans. A Rental Plan is a set of rules that determine the rental charges, deposits and late fees associated with renting an item.

It continues with the actions to take at point-of-sale for renting and returning items.

Rental Plans

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.

Each rental item has one or more Rental Plans assigned to it. Rental Plans are created and assigned to items at the Retail Pro Main.

When rental items are rented or returned, the Rental Plans determine what you see on the receipt. Therefore, it is important to understand the various elements of a Rental Plan. You will see these elements displayed in Retail Pro.

Elements of 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 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.

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. 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.

With Pay on Pickup, the customer pays when the item is taken and 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.

With Pay on Return, the Rental Module will calculate the Rental Fee that is due based on the Rental Period, the Rental Rate and how long the customer had it.

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

Discounts

A discount can be applied to a Rental Rate. The discount will appear on the receipt as a line item discount.

Return By

"Return By" refers to how the return time is determined. The "Return By" can be exact or by time of day. This is used to calculate the Due Date of an item.

If the "Return By" is "Exact", the Due Date will be the exact time it was rented on the date it is due. But if the "Return By" is "Time", then the Due Date will be the time that has been entered on the date the item is due.

For example, an item's Rental Plan has a period of 3 days. The item is rented on September 1 at 11:00 am.

With Return By set to "Exact" the item is due on September 4 at 11:00 am. After that, it is considered to be late.

With Return By set to "Time" and the time set to 3:00 pm, the item is due on September 4 at 3:00 pm. After that, it is considered late.

Note that all Rental Plans with a rental period based on Hours will use Exact for Return By.

Rental Rounding Factor

The Rental Rounding Factor only applies to Pay on Return when the Rental Module calculates how long the customer has had an item.

In most cases, the amount of time the customer has the item will not be an exact number of hours, days, weeks or months. It will be something like 1 day 14 hours, or 1 week 3 days.

The Rental Rounding Factor determines if the rental item is rounded up, down or used exactly. There are four settings:

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

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

Nearest: The time is rounded to the nearest number.

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

Deposit Amount

A Rental Plan may or may not have a deposit and the deposit amount can be based on a Retail Pro Price Level or be an amount set for the Rental Plan.

Late Fees

A Rental Plan may or may not include late fees. The Rental Module will automatically calculate any late fees due when an item is returned.

How much late fee is charged is based on several items:

Late Fee Amount – The Late Fee can be an amount set for the Rental Plan or based on a price level.

Late Fee Period – Late Fee Period 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. It is abbreviated as ESP.

If ESP is set to N, then the total late fees cannot exceed the item's sale price. (This is per item). If the late fees exceed the sales price, the sales price becomes the total late fee.

If ESP is set to Y, then the total late fee can exceed the sale price.

Screen Sizing

Most of the screens in the Rental Module can be resized to fit your monitor and preferred position. For screens with column-type displays, the column sizes can be adjusted.

Adding Rental Items to a Receipt

Start a receipt as you would normally do.

Add a Bill to Customer. Bill To Customers are required for Rental Items.

Scan or enter the item number of the rental item. If the rental item only has one plan assigned to it, the item placed directly onto the receipt. But if the item has more than one plan assigned to it, you will see the Rental Plan selection screen.

NOTE: If the Customer has a reservation for the item you are adding, a message will be displayed and the item will not be added to the receipt. You should use the "Use Reservation" button to add the item. See the section on "Using Reservations".

Rental Plan Selection Screen

The Select Plan screen shows the Rental Plans assigned to the item. The columns of the display refer to the Rental Plan elements.

Name – The plan name.

Rental Period – The number and type of period (Hours, Days, Weeks, Months).

PRR – The column combines the Pay Rental setting along with the Rental Rounding setting. The first letter is the Pay Rental (P=Pickup, R=Return), the second letter is the Rental Rounding setting (U=Up, D=Down, N=Nearest, E=Exact).

Rate – The Rental Rate – This will either be an amount or a price level indicated as PL X. (For example PL 2).

Discount – Any discount percent or discount amount.

Return By – This is the Return By setting and will either be the word "Exact" or the time of day.

Deposit – This will be the deposit amount or a price level indicated as PL X.

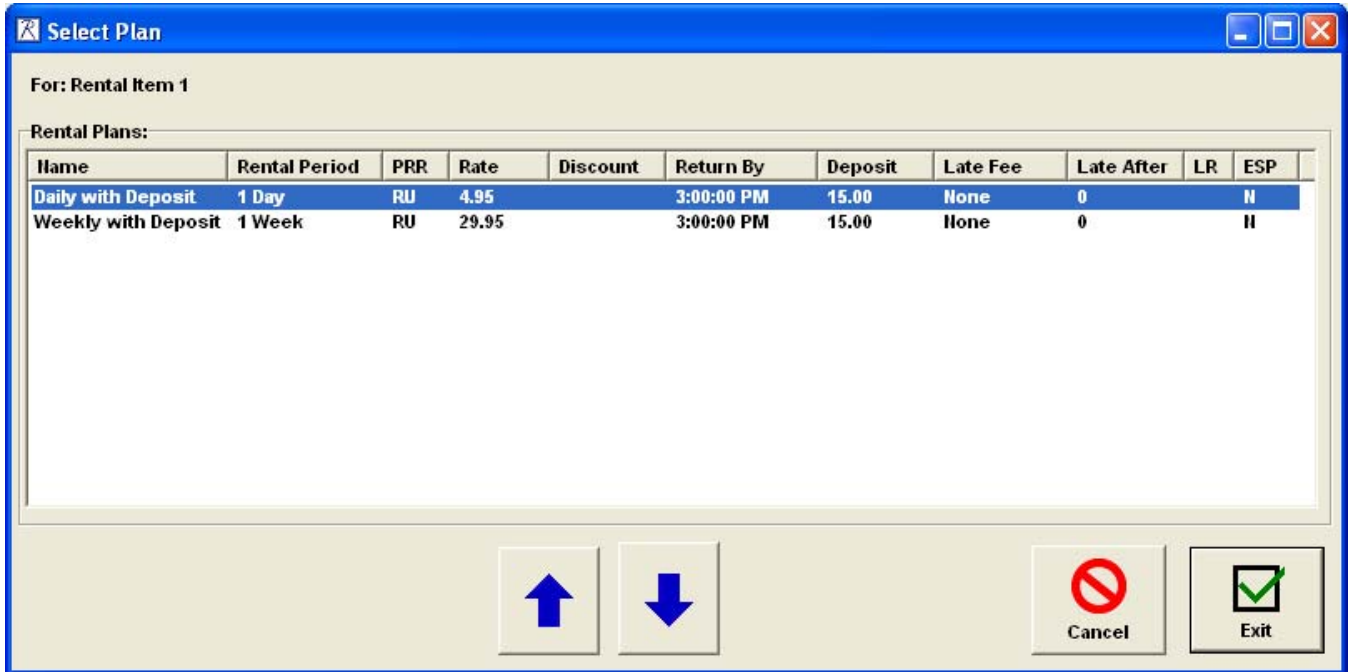
Late Fee – This will be the late fee amount (or price level indicated as PL X) and the late fee period (Hour, Day, Week, Month).

Late After – The number of rental periods after which the item is late.

LR – The Late Rounding factor. It will be one of U, D, N or E.

ESP – The Late Fees Can Exceed Sales Price setting. Y or N.

Here is an example of a Select Plan screen:



Select a Rental Plan by using the Up or Down arrow buttons or the mouse and click Enter.

If you click Cancel the item will not be added to the receipt.

By way of example, this item has two Rental Plans assigned to it:

Daily With Deposit – This plan has a rental period of 1 day. The Pay Rental is R (on return) and the rental rounding factor is Up. The rental rate is \$4.95 per day. The item must be returned by 3:00 pm on the day it is returned or it would be considered another day. (Since rental rounding is set to Up). There is a \$15.00 deposit for this plan and no late fees.

Weekly With Deposit – This plan has a rental period of 1 week. The Pay Rental is R (on return) and the rental rounding factor is Up. The rental rate is \$29.95 per week. The item must be returned by 3:00 pm on the day it is returned or it would be considered another week. (Since rental rounding is set to Up). There is a \$15.00 deposit for this plan and no late fees. Note that if the customer returns this item anytime before a week has passed, the full weekly rate will still be due. If the customer returns the item at 4:00 pm seven days after it is rented, two weeks of rental rate will be due.

Examples of Rental Items on the Receipt

Example of Pay On Return Rental

Here is an example of a rental item with Rental Plan Daily With Deposit:

Item #	DCS	Vend ...	Desc 1	Qty	Orig P\$	Rcpt P\$	Desc 3	UDF Name	Desc 4
175	RENTALDPT	XYZ	Rental Item 1	1	0.00	0.00	15.00		
173	M M M	ABC	Rental Deposit	1	15.00	15.00			
<p style="text-align: right;">Total Qty Sold 2.00 SubTotal 15.00</p>									

Since the rental is paid on return, the price is zero. In this example, the Desc3 field is being used for the deposit amount, the UDF Name field is being used for Late Fee and the Desc4 field is being used for Due Date. Because this item is paid on return and has no late fee settings, there is no due date.

Note that the deposit is charged in the Rental Deposit item (item # 176). If another rental item with a deposit amount is added to the receipt, the deposit amount will be increased.

Example of Pay on Pickup Rental

Here is an example of a receipt with an item with a Rental Plan that uses pay on pickup with no deposit. This Rental Plan is a 3-Day rental. The item is late after 3 days and must be returned by 3:00 pm on the due date:

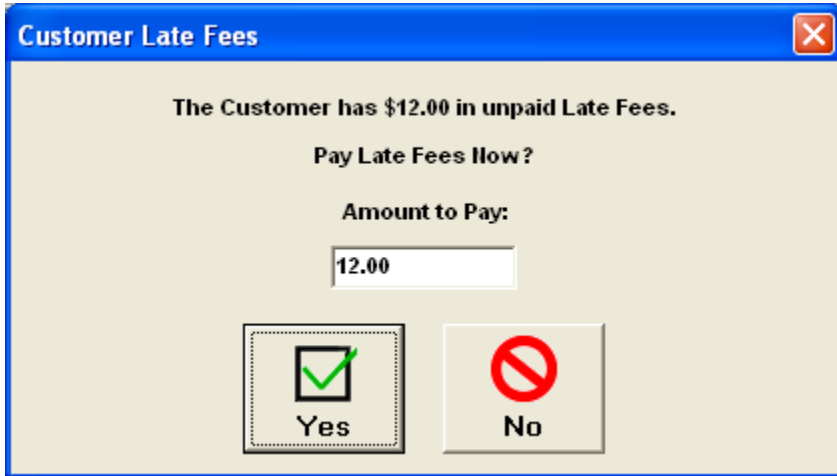
Item #	DCS	Vend ...	Desc 1	Qty	Orig P\$	Rcpt P\$	Desc 3	UDF Name	Desc 4
176	RENTALDPT	XYZ	Rental Item 2	1	5.95	5.95	0.00		09/01/2009 3:00:00 PM
<p style="text-align: right;">Total Qty Sold 1.00 SubTotal 5.95</p>									

There is no deposit amount. (In this example, Desc3 is used for the deposit amount).

In this example, Desc4 is used for the due date, which is shown in date/time format.

Customers With Unpaid Late Fees

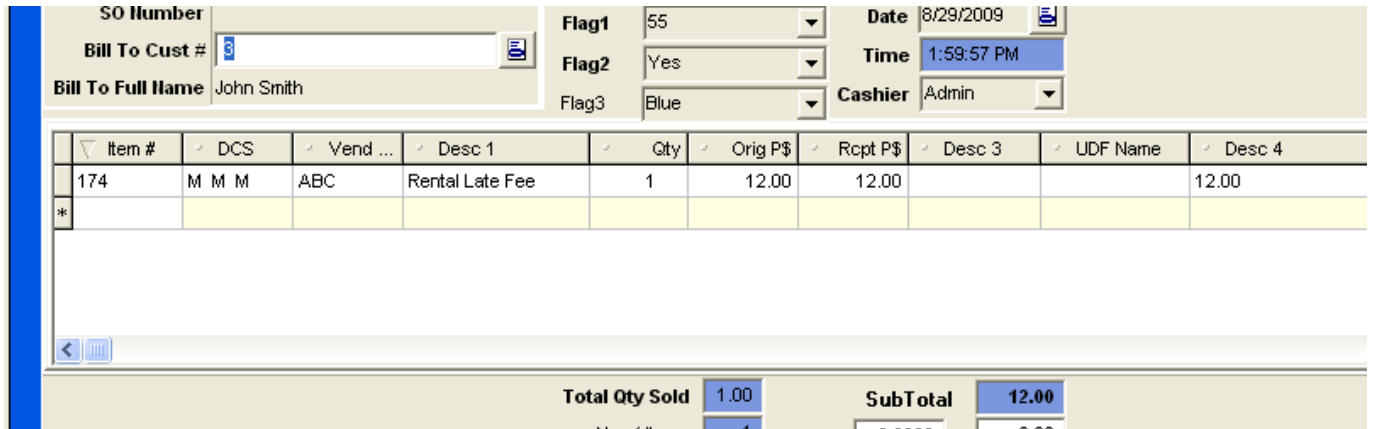
If the Bill To Customer on a receipt has unpaid late fees, you will see this screen when the Customer is added to the receipt:



If the customer wants to pay the late fees now, enter the amount to pay and click Yes.

Otherwise, click No.

If Yes is used, the late fees appear on the receipt:



The number that appears in the Desc4 field is used internally by the Rental Module. It is not printed with the receipt.

Adjusting Deposit Amounts

It is possible to change the deposit amount for an item at POS. To do this:

Select the rental item on the receipt:

Item #	DCS	Vend ...	Desc 1	Qty	Orig P\$	Rcpt P\$	Desc 3	UDF Name	Desc 4
175	RENTALDPT	XYZ	Rental Item 1	1	0.00	0.00	15.00		
173	M M M	ABC	Rental Deposit	1	15.00	15.00			

Total Qty Sold 2.00 **SubTotal** 15.00

From the side menu, select the Adjust Deposit button. (This button is only active when a rental item is selected).



The Adjust Deposit screen will be displayed:

Adjust Deposit ✖

Deposit (Per Item): **Deposit (Total Qty):**

15.00 15.00

New Deposit (Per Item):

15.00

OK

Cancel

The deposit amount per item (quantity 1) and total quantity for this line item are shown.

Enter the new deposit amount.

Click the OK button.

The new deposit amount is shown on the screen (in this example the deposit amount was changed to 10.00):

Item #	DCS	Vend ...	Desc 1	Qty	Orig P\$	Rcpt P\$	Desc 3	UDF Name	Desc 4
175	RENTALDPT	XYZ	Rental Item 1	1	0.00	0.00	10.00		
173	M M M	ABC	Rental Deposit	1	10.00	10.00			

Total Qty Sold 2.00 **SubTotal** 10.00

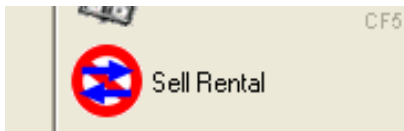
Zero Balance Receipts

If an item with a Pay Rental on Return and no deposit amount is rented, it will be a zero balance receipt. This receipt still must be updated (and printed) to record the rental.

Selling a Rental Item

To sell a rental item, place the item on the receipt (if necessary choose a rental plan).

Select the item on the screen and click the Sell Rental button on the side menu:



The price of the item will be changed to the sale price. Any deposit amount or due date will be removed.

If there is a deposit item on the receipt, the deposit amount will be changed:

Item #	DCS	Vend ...	Desc 1	Qty	Orig P\$	Rcpt P\$	Desc 3	UDF Name	Desc 4
175	RENTALDPT	XYZ	Rental Item 1	1	12.95	12.95			
173	M M M	ABC	Rental Deposit	1	0.00	0.00			

Note that if the deposit amount of the deposit item is zero, you can manually remove it from the receipt.

Rental Returns

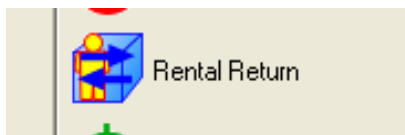
There are two methods of returning rental items: Rental Return and Drop Return

Rental Return

Rental Return is used when the customer comes into the store to return the item.

When using Rental Return, although it is not necessary, it is best to place the customer on the receipt as the Bill To Customer.

To use Rental Return, start a new receipt and (optionally) add the customer as the Bill To Customer. Click the Rental Return button on the side menu:



The Rental Return screen will be displayed:

Item #	Customer	Desc1	Out Date	Due Date	Rented	Rent Qty	Ret Qty	Late Fees	Deposit

If you have placed a Bill To Customer on the receipt, the name of the Bill to Customer will appear in the Customer section.

Rental Return Display

The top of the Rental Return screen has various methods for locating items that are being returned.

The center section of the screen has the list of items that can be returned. This section has ten columns:

Item # - The Retail Pro item number.

Customer – The Customer in Last Name, First Name format.

Desc1 – The rental item Description 1 field.

Out Date – The date/time the item was rented.

Due Date – Either “None” or the Due Date in date/time format.

Rented – The exact amount of time the customer has had the item. It is shown as number of days followed by hours:minutes. This time determines number of rental periods and late time based on the rental plan.

Rent Qty – The quantity of the item that is rented.

Ret Qty – The quantity of the item being returned.

Late Fees – The total amount of late fees for this item. (This is the late fee amount per item times the quantity being returned.

Deposit – The total amount of deposit for this item.

Below the list of return items is a section that has additional information for an item. When an item is selected, the following information is displayed for that item:

Desc2/Attr/Size – Additional Retail Pro item description.

Rental Plan – The name of the Rental Plan.

Orig Rcpt No – The original receipt number.

Rent Periods – The number of period (with period type) the item has been rented.

Rate/Total – The rental rate (per period) and the total rental fee for the item. If the Rental Plan uses Pay Rental on Pickup, this will be zero.

Plan Period – The rental period for the rental plan. This is the number of hours, days, weeks or months.

Late After – Either “Never late” or the number of rent periods after which the item is late.

Overdue By – Either “Not Overdue” or the length of time the item is overdue.

Late Terms – The amount of late fee and the late fee period.

The buttons at the bottom of the screen are used for various functions related to returning the items.

Listing the Return Items

There are several ways to locate the items being returned and place them on the Rental Return screen.

Finding By Receipt Number

If the customer has the original rental receipt, the easiest way to list the items that are being returned is by using the original receipt number.

If the cursor is not positioned in the Receipt Lookup box, place it there. Enter or scan the receipt number from the original receipt.

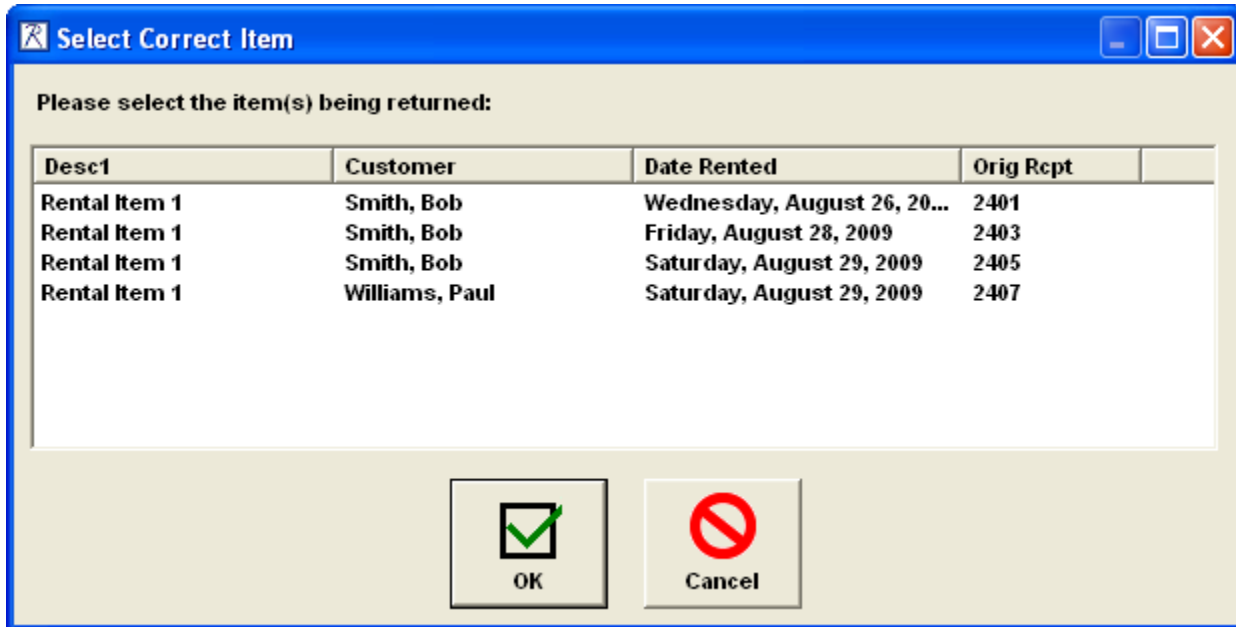
The items that were rented from that receipt will appear on the screen.

Finding By Item Lookup

You can locate a single item being returned by entering (or scanning) the UPC, ALU or item number into the item lookup section.

Position the cursor in the Item Lookup box and enter or scan the UPC, ALU or number. If you have entered the Bill To Customer, the item rented by the customer should appear on the screen. If the customer rented the same item at more than one time and has not returned the items, all items currently rented will appear on the screen.

If you did not enter a Bill To Customer on the receipt and use item lookup, you will see a list of all customers who have rented the item and will have to pick the correct item being returned:



In this example, Bob Smith has rented this item 3 times and none of these have been returned yet. Paul Williams has one of these items currently rented.

Select the item being returned and click the OK button. You can select multiple items by holding down the Ctrl key on the keyboard and using the mouse to click on the items.

Finding By Customer

There are several ways to use the Customer section of the Rental Return screen to locate items.

If a Bill to Customer was placed on the receipt, the customer's name appears in the Customer section. If you click the Find button, all the items that the customer has rented will appear on the screen.

If there was no Bill To Customer on the receipt or you want to search for items rented by a different customer, you can enter a last name, company name or phone number in the Customer box and click the Find button.

If no matching customer is found, you will see the message "No matching customers found."

If one matching customer is found but the customer does not have any items rented, you will see the message "[Customer Name] does not have any items rented."

If one matching customer is found and the customer has items rented, the items are placed on the Rental Return display.

If more than one matching customer is found, the list of matching customers is displayed:

Name	Company	Phone 1	Phone 2	Address 1	Zip
Smith, Bob	Federal Vacuum Ind...			230 Circle Sq.	64333
Smith, John	111111			54 Shady Brook Lane	66444
Smith, John		(222) 333-4444	(444) 232-6666	47 East End Blvd.	10012
Smithy, Bob				4 Circle Sq.	

Select a customer from the list and click the OK button. If the customer has any items rented, they are added to the display.

Click Cancel to exit without selecting a customer.

Use the Clear button to clear the Customer text box.

The Bill To button is only active if a Bill To Customer was placed on the receipt. Clicking this button places the Bill To Customer name back in the Customer text box.

Returning the Items

When items are added to the Rental Return display, the Return Quantity is set to the Rental Quantity. (It is assumed that all items are being returned).

However, items are not combined. Each item from the original receipt has its own line in the display. So, if a customer rented 2 of item 100 on one receipt and 1 of item 100 on another receipt, there will be two item 100 lines on the Rental Return display: one with a rental quantity of 2 and one with a rental quantity of 1.

On the Rental Return screen you determine what items are being returned. These items are then added to the receipt along with any late fees. In addition, any deposits that were taken are returned.

Here is a sample Rental Return screen with items that will be used as examples for returning items. It is a good illustration because it has the same item rented 3 times with two different rental plans. None of these plans have a due date or late fees:

Rental Return

Receipt Lookup: Find Item Lookup: Find Customer: Find Clear Bill To

Rented Items:

Item #	Customer	Desc1	Out Date	Due Date	Rented	Rent Qty	Ret Qty	Late Fees	Deposit
175	Smith, Bob	Rental Item 1	08/26/2009 8:03:42 PM	None	3 15:55	1	1	0.00	15.00
175	Smith, Bob	Rental Item 1	08/28/2009 9:37:14 PM	None	1 14:22	1	1	0.00	15.00
175	Smith, Bob	Rental Item 1	08/29/2009 10:01:31 AM	None	1 01:58	1	1	0.00	15.00

Desc2/Attr/Size: Plan Period: Late After: Overdue By:

Rental Plan: Orig Rept No:

Rent Periods: Rate/Total: Late Terms:

Note that for the first item, it has been out for 3 days, 15 hours and 9 minutes. Based on the rental plan, this becomes a 4-day rental. With a rental rate of 4.95 per day, the total rental fee is 19.90.

Arrow Buttons

The Up and Down arrow buttons change the selected item on the screen. This can also be done by clicking a line with the mouse.

Remove Item

It is possible to have items on the display that are not being returned. The easiest method to prevent an item from being returned is to select the item and click the Remove Item button. The item will be removed from the display.

History

The History button will display the transaction history for the selected item and customer.

Inc Qty and Dec Qty

The Inc Qty button will increase the Ret Qty (return quantity) of an item. The Dec Qty button will decrease the return quantity of an item. These buttons are mostly used when the Rent Qty is greater than one and only some of the items are being returned.

Setting the Ret Qty of an item to zero will also stop it from being returned.

Cancel Button

Select Cancel to exit this screen without making any changes to the receipt.

OK Button

When the OK button is clicked, the items with a return quantity greater than zero are placed on the receipt.

As an example, the second item is removed from the Rental Return screen leaving:

The screenshot shows the 'Rental Return' window. At the top, there are three search sections: 'Receipt Lookup', 'Item Lookup', and 'Customer'. The 'Customer' field contains 'Smith, Bob'. Below these is a table titled 'Rented Items' with the following data:

Item #	Customer	Desc1	Out Date	Due Date	Rented	Rent Qty	Ret Qty	Late Fees	Deposit
175	Smith, Bob	Rental Item 1	08/26/2009 8:03:42 PM	None	3 15:59	1	1	0.00	15.00
175	Smith, Bob	Rental Item 1	08/29/2009 10:01:31 AM	None	1 02:02	1	1	0.00	15.00

Below the table are several input fields: 'Desc2/Attr/Size', 'Plan Period', 'Late After', 'Overdue By', 'Rental Plan', 'Orig Rpt No', '# Rent Periods', 'Rate/Total', and 'Late Terms'. At the bottom, there is a toolbar with buttons for navigation (up/down arrows), 'Adjust', 'Remove Item' (highlighted with a red border), 'History', 'Inc Qty', 'Dec Qty', 'Cancel', and 'OK'.

When OK is clicked, the two remaining items are added to the receipt as return items.

Return Items on the Receipt

Here is an example of return items with no late fees on the receipt from the Rental Return screen above:

The screenshot shows a receipt table with the following data:

Item #	DCS	Vend ...	Desc 1	Qty	Orig P\$	Rcpt P\$	Desc 3	UDF Name	Desc 4
175	RENTALDPT	XYZ	Rental Item 1	-1	(19.80)	(19.80)	(15.00)	0.00	
175	RENTALDPT	XYZ	Rental Item 1	-1	(29.95)	(29.95)	(15.00)	0.00	
173	M M M	ABC	Rental Deposit	1	(30.00)	(30.00)			
*									

Below the table, there are summary fields: 'Total Qty Sold' is -1.00, 'SubTotal' is 19.75, 'No of Items' is 3, 'Disc %' is 0.0000, and 'Tax %' is 8.000. The 'Str/Sta' field shows '0010' and 'Wks' shows '1'.

Note that the quantities of the return items are negative. This is so they go back into inventory. The prices are also negative so that the customer is charged for the rental fee. However, when the receipt is printed, the quantities and prices will appear as positive numbers.

The price for each item is the total rental fee based on the rental rate and amount of time the customer had he item.

In this example, the Desc3 field for rental items is used for the deposit amount. In this case, since items are being returned and there was a deposit, the deposit amount is negative.

The Rental Deposit item is also added to the receipt with the total amount of deposit being returned to the customer.

Here is an example of a rental return screen with late fees for an item:

Rental Return

Receipt Lookup: Find Item Lookup: Find Customer: Find Clear Bill To

Rented Items:

Item #	Customer	Desc1	Out Date	Due Date	Rented	Rent Qty	Ret Qty	Late Fees	Deposit
176	Smith, John	Rental Item 2	08/26/2009 8:48:58 PM	08/29/2009 3:00:00 PM	3 15:16	1	1	2.00	0.00
176	Smith, John	Rental Item 2	08/29/2009 10:11:04 AM	09/01/2009 3:00:00 PM	1 01:54	1	1	0.00	0.00

Desc2/Attr/Size: Plan Period: Late After: Overdue By:

Rental Plan: Orig Rept No:

Rent Periods: Rate/Total: Late Terms:

In this example, the first item uses the 3 Day Pickup rental plan. In this plan, the customer pays 5.95 when the item is picked up. The due date is by 3:00 pm 3 days after the item is rented. There is a late fee of 2.00 per day.

In the list section of the screen we see the Out Date (date and time the item was rented), the date and time the item is due, the total out time of 3 days 15 hours and 16 minutes, the rental/return quantities, the late fee per item and deposit amount (none).

With the first item highlighted, the additional information for this item is shown below the list. Because the rental fee was paid on pickup, the # Rent Periods is 1 and the rate is the rental rate. (The rental rate/Pickup indicates the rental fee has already been paid). The plan period is 3 days, the item is late after 1 period (3 days), is now overdue by 1 days and the late fees are 2.00 per day.

With the second item highlighted:

Rental Return

Receipt Lookup: Find Item Lookup: Find Customer: Find Clear Bill To

Rented Items:

Item #	Customer	Desc1	Out Date	Due Date	Rented	Rent Qty	Ret Qty	Late Fees	Deposit
176	Smith, John	Rental Item 2	08/26/2009 8:48:58 PM	08/29/2009 3:00:00 PM	3 15:16	1	1	2.00	0.00
176	Smith, John	Rental Item 2	08/29/2009 10:11:04 AM	09/01/2009 3:00:00 PM	1 01:54	1	1	0.00	0.00

Desc2/Attr/Size: Plan Period: Late After: Overdue By:

Rental Plan: Orig Rept No:

Rent Periods: Rate/Total: Late Terms:

When OK is clicked, both items are placed on the receipt:

Item #	DCS	Vend ...	Desc 1	Qty	Orig P\$	Rcpt P\$	Desc 3	UDF Name	Desc 4
176	RENTALDPT	XYZ	Rental Item 2	-1	0.00	0.00	0.00	2.00	
176	RENTALDPT	XYZ	Rental Item 2	-1	0.00	0.00	0.00	0.00	
174	M M M	ABC	Rental Late Fee	1	2.00	2.00			
*									

Total Qty Sold	-1.00	SubTotal	2.00
No of Items	3	Disc %	0.0000
		Tax %	8.000
			0.00

Because both of these rentals were paid on pickup, there is no rental fee. The quantities of both items is -1 to return them to inventory. In this example, the UDF Name field is being used for late fees, so we see the 2.00 late fee for one of the items in the UDF Name field.

We also see the Rental Late Fee item with the 2.00 late fee. The Rental Late Fee item will have the total late fees for all items on the receipt.

Adjusting Rentals at Return

From the Rental Return screen, use the Adjust button to adjust the rental period or late fees for an item. This button is only active if the rental fee is charged on return or the item has a late fee. When the button is clicked the Adjust Rental screen is shown:

Adjust Rental ✖

Change Rental Periods:

From to

Change Late Fee Per Item:

From to

OK

Cancel

If the rental is charged on pickup, the Change Rental Periods section will not be shown.

If the item is not overdue or does not use late fees, the Change Late Fee per item section will not be shown.

Enter the new number of rental periods.

Enter the new late fee per item.

Click OK to make the changes.

Click Cancel to exit without changing anything.

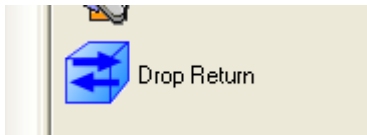
Drop Return

Drop Return is used when customers drop of return items without interacting with a cashier. The video rental return drop is a good example of drop return.

Drop Return is only available if the Rental Module has been set up to accumulate customer late fees. Drop Return really works best when each rental item has its own unique barcode. This makes it very easy to scan items into the Drop Return list.

IMPORTANT NOTE: DROP RETURN CANNOT BE USED FOR ITEMS THAT ARE PAID ON RETURN OR TAKE A DEPOSIT. THESE ITEMS MUST BE RETURNED USING RENTAL RETURN.

To use Drop Return, go to the Receipt List View screen and click the Drop Return button:



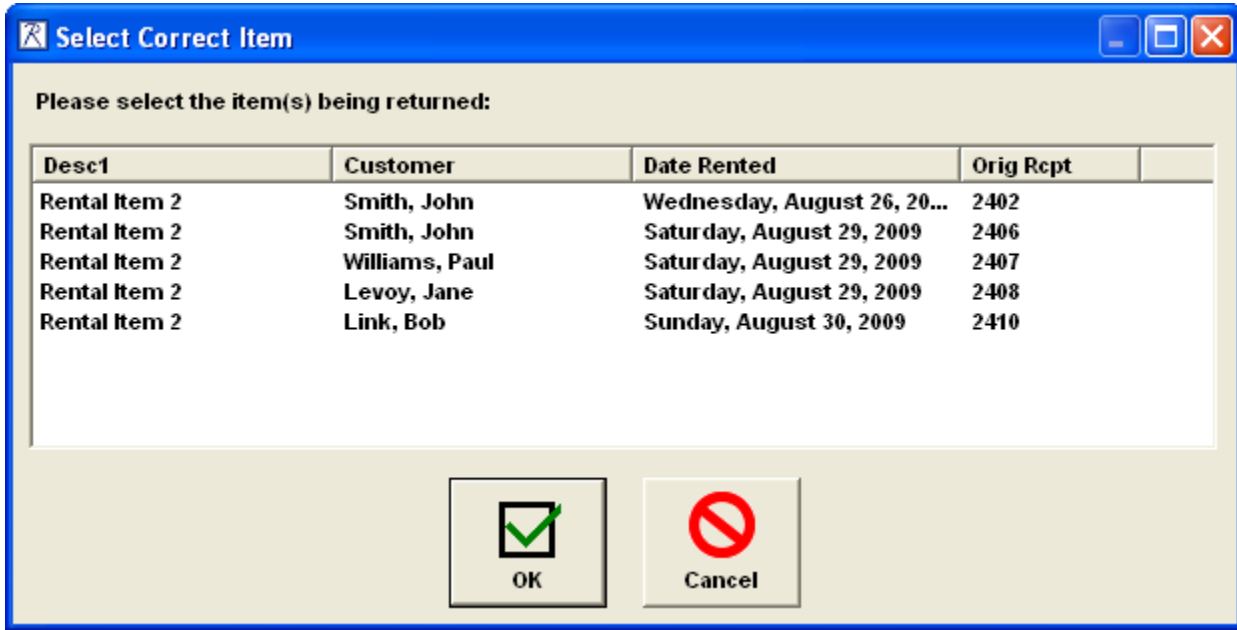
The Drop Return screen will be displayed:

The Drop Return screen is almost the same as the Rental Return screen.

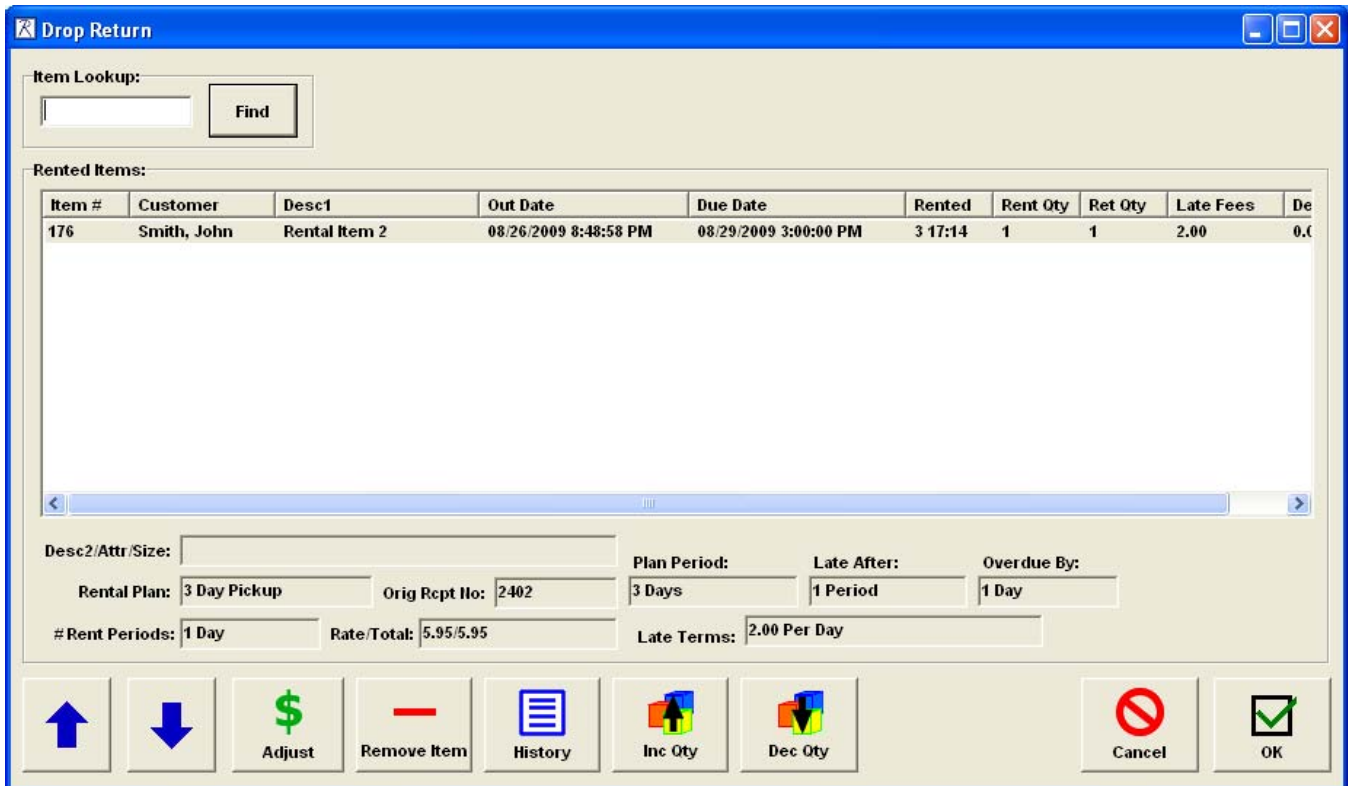
Items are added to the Drop Return screen by entering the UPC, ALU or Item Number in the Item Lookup and clicking the Find button.

If only a single item is found, it is added to the display.

However, if more than one item is found, all the rented items are displayed and you must pick from a list:



As items are added to the display, it is the same as the Rental Return screen:



The buttons on the Drop Return screen have the same functions as the Rental Return screen.

The operation when the OK button is clicked is completely different.

When the OK button is clicked, the Rental Module takes the following actions:

For each item with a late fee, the unpaid late fee amount in the customer record is increased by the late fee amount.

Optionally, invoices can be generated for customers with late fees. If this option is selected, an invoice is generated for all customers with late items. The invoices have the rental item and late fee amount. The invoices are tendered using Charge.

A single invoice is generated for all remaining items to return them to inventory. This is a zero balance receipt.

Reservations

To make a reservation for a rental item, select the Reservations button from the Customer screen, Inventory screen or Receipt List View screen.



The Reservations Maintenance screen will be displayed:

Reservation Maintenance

Filtering:

Customer:

Reservation Dates: **From:** 11/ 3/2009 **To:** 11/10/2009

Item:

Reservations:

Reservation Date	Date Made	Item	Customer	Qty	Note

Item Desc:

Cust Phone 1: Cust Phone 2:

If you selected Reservations from the Customer screen, the Customer name is already set. If you selected Reservations from the Inventory screen, the Item is already set. If you selected Reservations from the Receipt List view screen, neither the Item nor Customer is set.

The reservation date filter is preset to the next week.

From this screen you can:

- 1) View all reservations for a single customer. (Select a customer and no item).
- 2) View all reservations for a single item. (Select an item and no customer).
- 3) View all reservations for a customer/item combination. (Select an item and a customer).
- 4) View reservations for all items and customers. (Do not select an item or customer).

5) View any of the above by a specific date range.

Adding a Reservation

To make a new reservation, select the New button. The Make Reservation screen will be displayed:

Any Customer and Item selections from the Reservation Maintenance screen are brought over to this screen.

A Customer and Item must be selected on this screen to make a reservation.

Reservation Settings

Date – The Date of the reservation. This defaults to the current day.

Time – The time of the reservation. This defaults to noon.

Qty – The quantity of the item to be reserved.

Note – Any note that should be saved with the reservation.

Checking Availability

Enter the reservation date and time and click the Check Availability button.

The Availability grid will display the quantity available for various dates and times:

Make Reservation

Customer: Phone 1: Phone 2:

Item:

Make Reservation:

Date: Time: Res Qty: Note:

	Tue-11/03	Wed-11/04	Thu-11/05	Fri-11/06	Sat-11/07	Sun-11/08	Mon-11/09
12:00 PM	21	23	23	22	23	23	23
1:00 PM	21	23	23	22	23	23	23
2:00 PM	21	23	22	22	23	23	23
3:00 PM	21	23	22	22	23	23	23
4:00 PM	23	23	22	22	23	23	23
5:00 PM	23	23	22	22	23	23	23
6:00 PM	23	23	22	23	23	23	23

When the module checks availability, it is determining the quantity that will be available for a given date/time combination. It checks availability for seven days starting three days prior to the reservation date (excluding days earlier than the current date) and for seven hours on each day starting three hours prior to the reservation time.

The available quantity is determined from the number of items on-hand, plus items that are rented but will be returned by that time minus items for which there are reservations for that date/time.

NOTE: A RENTAL PLAN CAN BE "OPEN-ENDED" MEANING THAT IT DOES NOT HAVE A SPECIFIED RETURN DATE. RESERVATIONS FOR ITEMS WITH OPEN-ENDED PLANS AFFECT THE AVAILABILITY CHECKING BY BEING SUBTRACTED FROM THE AVAILABLE QUANTITY.

The highlighted grid cell is the reservation date/time.

If you select a different cell in the grid, the reservation date/time will change to that date/time.

Make Reservation

Click the Make Reservation button to make the reservation for the date/time shown in the Date and Time boxes. A confirmation message is displayed.

If the Rental Item has more than one Rental Plan associated with it, you will be prompted to select a Rental Plan.

NOTE: THE AVAILABLE QUANTITIES FOR A DATE/TIME DO NOT PREVENT A RESERVATION FROM BEING MADE FOR MORE THAN THE QUANTITY AVAILABLE. FOR EXAMPLE, IF THERE ARE 2 OF AN ITEM AVAILABLE FOR A DATE/TIME, A RESERVATION CAN BE MADE FOR 3 OR MORE.

Editing a Reservation

To edit an existing reservation, select the reservation in the Make Reservation screen and click the Edit button.

The Edit Reservation screen will be displayed:

This is basically the same as the Make Reservation screen. Select the new date/time, check availability (if needed) and click Make Changes.

The Edit Reservation screen can also be used to change the quantity or note without changing the reservation date/time.

Using Reservations

To place an item on a receipt using a reservation, set the Bill to Customer on the receipt and click the Use Reservation button from the Receipt Form View screen:



The Use Reservation screen will be displayed:

Customer:

Smith, Bob Find Show Phone 1: Phone 2:

Reservations:

Reservation Date	Date Made	Item	Qty	Note
Tue 11/03/2009 3:30 PM	Tue 11/03/2009 11:24 AM	Rental Item 1	1	

Navigation buttons: Up, Down, Delete, Use Selected, Cancel

The Bill To Customer will be shown at the top of the screen. You can change the Customer setting for finding the reservation, but this will not change the Bill to Customer on the receipt.

Select the reservation you want to use and click the Use Selected button. The item will be added to the receipt.

If the item has multiple rental plans, the rental plan that was selected at the time the reservation was made is used for the item.

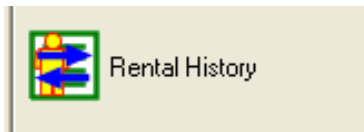
You can also delete a reservation directly from this screen.

Rental Reports

The Rental Module comes with three reports to assist you in tracking rental items.

Customer Rental History

This is a report for Rental History for a single customer. Select a Customer from the Customer List or Form View screen and click the Rental History button:



Customer Rental History Display

Here is an example of the Customer Rental History display:

Item No	Desc	Trans Date	Trans Type	Qty	Plan	Rental	Deposit	Late Fee	Store	Rcpt No	Cashier
175	Rental Item 1	08/10/2009 3:42:47 PM	Rental	1	Daily with Deposit	0.00	15.00	0.00	AAA	2413	Admin
175	Rental Item 1	08/13/2009 3:43:36 PM	Return	1	Daily with Deposit	14.85	-15.00	0.00	AAA	2414	Admin
178	Rental Item 4	08/17/2009 3:44:38 PM	Rental	1	3 Day Pickup	5.95	0.00	0.00	AAA	2415	Admin
176	Rental Item 2	08/17/2009 3:44:38 PM	Rental	1	3 Day Pickup	5.95	0.00	0.00	AAA	2415	Admin
176	Rental Item 2	08/19/2009 3:45:23 PM	Return	1	3 Day Pickup	0.00	0.00	0.00	AAA	2416	Admin
178	Rental Item 4	08/21/2009 3:46:07 PM	Return	1	3 Day Pickup	0.00	0.00	4.00	AAA	2417	Admin
176	Rental Item 2	08/29/2009 10:29:09 AM	Rental	1	3 Day Pickup	5.95	0.00	0.00	AAA	2407	Admin
175	Rental Item 1	08/29/2009 10:29:09 AM	Rental	1	Daily with Deposit	0.00	15.00	0.00	AAA	2407	Admin
177	Rental Item 3	08/30/2009 1:12:21 PM	Rental	1	5 Day Return	0.00	0.00	0.00	AAA	2409	Admin
175	Rental Item 1	08/30/2009 4:05:58 PM	Return	1	Daily with Deposit	9.90	-15.00	0.00	AAA	2418	Admin

The columns of this display are:

Item No – The Retail Pro item number.

Desc – The item Description 1.

Trans Date – The date and time of the transaction.

Trans Type – One of Rental or Return

Qty – The quantity of the item.

Plan – The Rental Plan name.

Rental – The total rental fee. This will be zero when renting an item with Pay on Return and zero when returning and item with Pay on Pickup.

Deposit – The amount of deposit. For return items, if a deposit was returned to the customer it is listed as a negative amount.

Late Fee – Any late fees paid when the item was returned.

Store – The Retail Pro store code.

Rcpt No – The receipt number for the transaction.

Cashier – The cashier.

Date Selection

There are two ways to select dates for this report: select a date setting from the Dates drop down or enter the From/To dates directly into the date boxes.

On entry the dates are set to MTD unless it is in the first 10 days of the month in which case the default setting is Last MTD.

The date settings in the drop down are:

MTD – Sets the dates for month-to-date.

YTD – Sets the dates for year-to-date.

Last MTD – Sets the dates for last month-to-date.

Last 2 Months – Sets the dates for the last 2 months.

Last 3 Months – Sets the dates for the last 3 months.

Last YTD – Sets the dates for last year-to-date.

The To Now button will set to To date to the current system date.

Click the Search button to search by date.

Item Filter

To see transactions for one particular item, select the row in the display and click the Item Filter On button.

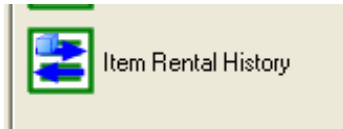
Click the Item Filter Off button to see transactions for all items.

Printing the Report

Click the Print button to print the transaction history.

Item Rental History

From the Inventory List or From View screen, click the Item Rental History button to see the rental history of the selected item. This button is only active for rental items.



Item Rental History Display

The Item Rental History display is similar to the Customer Rental History display. The columns are almost identical except that a Customer column replaces the Item No column:

 A screenshot of a software window titled "Item Rental History". The window has a blue title bar and standard Windows window controls (minimize, maximize, close). Inside the window, there is a header area with "Item #178 Rental Item 4". Below this, there are two sections: "Dates:" and "Customer Filter:". The "Dates:" section contains a dropdown menu with "MTD" selected, followed by two date pickers showing "8/1/2009" and "8/30/2009", and buttons for "To Now" and "Search". The "Customer Filter:" section has an "On" button. Below these controls is a table with the following data:

Customer	Trans Date	Trans Type	Qty	Plan	Rental	Deposit	Late Fee	Store	Rept No	Cashier
Williams, Paul	08/17/2009 3:44:38 PM	Rental	1	3 Day Pickup	5.95	0.00	0.00	AAA	2415	Admin
Williams, Paul	08/21/2009 3:46:07 PM	Return	1	3 Day Pickup	0.00	0.00	4.00	AAA	2417	Admin

 At the bottom of the window, there are two buttons: "Print" on the left and "Exit" on the right, which has a green checkmark icon.

Date Selection

The date selection is the same as the Customer Rental History report.

Customer Filter

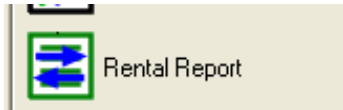
Select a row in the display and click the Customer Filter On button to view transactions for only that customer.

Click the Customer Filter Off button to view transactions for all customers.

Rental Report

The Rental Report is a report of all items that are currently rented.

Click the Rental Report button from the Inventory List or Form View screen:



Rental Report Display

When the button is selected, the Rental Report screen is shown:

 A screenshot of a software application window titled "Rental Report". The window has a blue title bar and standard Windows window controls (minimize, maximize, close). The main content area features a table with the following columns: Item #, Qty, Desc, Customer, Plan, Rent Date, Due Date, Overdue, Store, and Rcpt No. Below the table is a section labeled "Item/Customer Details:" containing several empty text input fields. At the bottom of the window, there is a control panel with a "Report" button (with a magnifying glass icon), a "Report Type:" section with radio buttons for "Overdue Items" (selected) and "All Items", a "Print" button (with a printer icon), and an "Exit" button (with a checkmark icon).

The columns for the report are:

Item # - The Retail Pro item number.

Qty – Quantity rented.

Desc – Item Description 1

Customer – Last Name, First name of the customer.

Plan – Rental Plan Name

Rent Date – The date/time the item was rented.

Due Date – "None" or the date/time the item is due.

Overdue – "Not Overdue" or the amount of time the item is overdue.

Store – The Retail Pro store code.

Rcpt No – The receipt number for the transaction.

Report Type

Select a Report Type. The choices are All Items or Overdue Items.

Report Button

Click the Report button to display the report.

Print Button

Click the Print button to print the report.