
Advanced Alert EasyPro

Sub-Rental Module

Version 8.0

By Alert Management Systems

Contents

- Introducing the Sub-Rental Module..... 4**
 - The Sub-Rental Module.....4
 - Components of the Sub-Rental Module.....5
- Using the Sub-Rental Module 6**
 - Setting up Vendors.....6
 - Using the Sub-Rental Module at the Counter8
 - Viewing Sub-Rental and Projected Purchase Records9
- Sub-Rental Reports..... 12**
 - Sub-Rental Pickup / Returns Report13
 - Sub-Rental Changes Report.....14
 - Overdue Projected Purchases.....15
 - Cancelled Sub-Rentals / Purchases.....16
 - Excess Sub-Rental Report17

Introducing the Sub-Rental Module

Contents

The Sub-Rental Module

Components of the Sub-Rental Module

The Sub-Rental Module

Congratulations on your purchase of the **Sub-Rental Module** for Alert EasyPro!

This module allows you to resolve overbooking problems by identifying and managing sub-rental situations at your rental counter. Bulk items to be sub-rented can be identified immediately at the counter and sub-rental reports can be used to organize the ordering and return of sub-rented equipment. Items coded to be sub-rented automatically update availability records.

Sub-Rental reports also identify sub-rentals that become unnecessary because of order cancellation, saving you money. Fixed Asset records are updated with historical information on sub-rentals, allowing you to analyze current equipment levels and make more informed decisions on additional fixed asset purchases.

The sub-rental system also includes the ability to enter projected purchases (with expected delivery dates) to handle overbooking problems. Rental inventory can be ordered and added to a reservation before it is even delivered to your store.

Components of the Sub-Rental Module

The **Sub-Rental Module** includes several components.

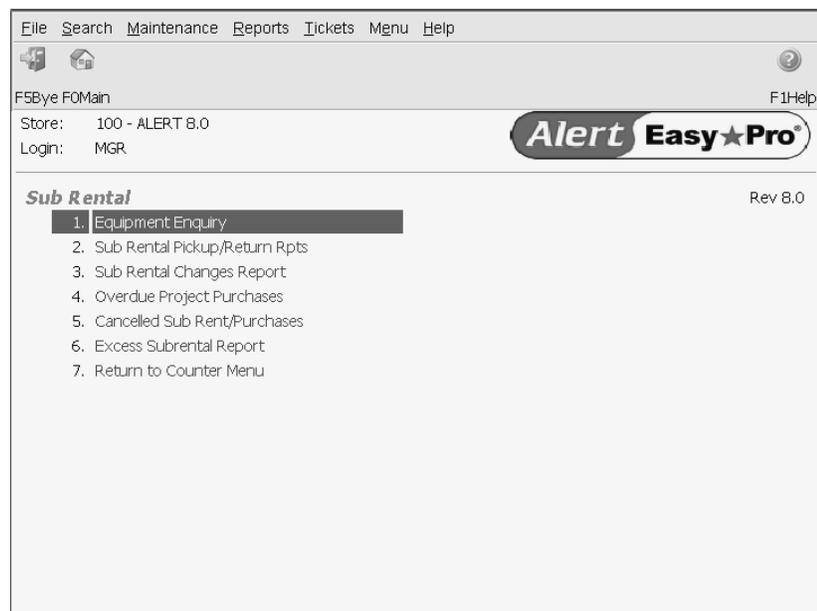
At the counter, use of the Sub-Rental module color codes sub-rentals and overbooking. When you save the ticket the system will allow you to create sub-rental or projected purchase records.

A new **Sub-Rental Menu** has been added to the **Counter Menu**. This menu provides you with the ability to change or cancel projected purchase and sub-rentals. This menu also includes Sub-Rental Reports.

A new functionality has been added to the **Fixed Asset Update** screen. Select **Sub-Rental** from the **Edit** menu to display complete sub-rental history.

Fixed Asset Receiving has been changed to check for projected purchases and will display any active projections.

The Sub-Rental Menu



Using the Sub-Rental Module

Contents

Setting up Vendors

Using the Sub-Rental Module at the Counter

Creating a Sub-Rental or a Purchase record

Setting up Vendors

Before you use the **Sub-Rental Module** at the counter, you will want to set up your vendor list in **Codes and Setup**. All companies you make purchases from and the business you sub-rent from should be added to the vendor list.

Adding Vendors:

1. At the **Main Menu**, select **Codes and Setup, Rental and Sales Item Codes, Vendor Codes**.

Vendor #	Description
1. 0	NONE
2. 104	ELKAY PRODUCTS CO INC
3. 107	PORTABLE HEATER PARTS
4. 108	ESSEX SILVER LINE CORP
5. 113	FISHER AUTO PARTS
6. 120	THE TABLECLOTH CO
7. 126	BROADWAY ELECTRIC INC
8. 132	GEORGIA RUBBER
9. 150	WAYNE OXYGEN
10. 152	WINDSOR INDUSTRIES
11. 153	SICO N. AMERICA
12. 167	SUPPLY SIDE
13. 168	HOBART
14. 169	KYANITE MINING
15. 178	STANLEY BOSTITCH

2. To begin entering Vendor Codes, click **F5Add**.
3. Type the six-digit vendor number you will use to identify this vendor and press **Enter**. Type a description for the Vendor, usually the name of the business and press **Enter** again.
4. A small box appears on your screen for you to add additional information about this vendor. Type the business address, phone number, and fax number.

Vendor Address Information	
Vendor:	894 OFFICE DEPOT
Address:	7832 NORTH CLEARWATER KENNEWICK, WA 98974
Phone:	(509)326-0874
Fax:	(509)326-0873
PartSmart Price Multiplier:	0

5. Once you press **Enter** after typing the last line of information, you will be returned to the vendor code screen. From there you can add more vendors, change vendor information or exit the screen by clicking **F10Back**.

Using the Sub-Rental Module at the Counter

The **Sub-Rental Module** is triggered when an overbooked item has been added to a contract. The Sub-Rental module highlights overbooked items in red, sub-rented or projected purchase items are highlighted yellow. Sub-rental records can only be created for bulk rental items.

When a ticket with an overbooked item is saved, the system will display a screen that lists the overbooked bulk rental items. It is on this screen, the **Overbooked Items** screen, that you create sub-rental and projected purchase records.

Overbooked Items

Name JOE ARMSTRONG
Driv# 1754825 DOBth Type CA CON 24516 20
Out Date/Time 11/09/2005 2:39 PM In Due Date/Time 11/10/2005 2:39 PM

Rent Key	Ty	Qty	Vendor	Purchase Order	Pickup Dt	Return Dt	Expect Dt
#TRE	0000	0					
MANHOLE CASE SHORING	Cost	0.00	Qty Required	100	Qty Available	-2	
#DUB	0000	0					
SANDER-DUB HARDWOOD SANI	Cost	0.00	Qty Required	2	Qty Available	-1	
#CH	0000	0					
CHAINS & BINDERS	Cost	0.00	Qty Required	15	Qty Available	-5	
	Cost		Qty Required		Qty Available		
	Cost		Qty Required		Qty Available		
	Cost		Qty Required		Qty Available		
	Cost		Qty Required		Qty Available		
	Cost		Qty Required		Qty Available		

Total Page(s) 1

To add a sub-rental record:

1. Use the arrow keys to highlight the item for which a sub-rental record will be created and click F6Chng.
2. In the **Ty** (type) column, select **SB** for Sub-Rental.
3. Enter the quantity that will be sub-rented. The quantity required and the quantity on hand is displayed on the next line to help you in your decision.
4. Enter the code for the vendor you will be sub-renting from. If you are unsure of the code, then click the drop-down arrow for a list of vendors set up in the system.
5. Enter a PO number, if required.
6. Enter an anticipated pickup date.

7. Enter an anticipated return date.

NOTE: Sub-Rental item availability starts one day after pickup and ends one day before you return the item to the vendor.

8. Enter the projected cost of the sub-rental (a default value appears).
9. Repeat the above steps for each overbooked item that will be fulfilled by a sub-rental.

To add a projected purchase record:

1. Use the arrow keys to highlight the item for which a projected purchase record will be created and click F6Chng.
2. In the **Ty** (type) column, select **PR** for Purchase.
3. Enter the quantity that will be purchased. The quantity required and the quantity on hand is displayed on the next line to help you in your decision.
4. Enter the code for the vendor you will be purchasing from. If you are unsure of the code, then click the drop-down arrow for a list of vendors set up in the system.
5. Enter a PO number, if required.
6. Enter the date you expect to receive the purchased item.

NOTE: Purchase availability starts on the expected date and can be booked up to a year in advance.

7. Enter the projected cost of the purchase (a default value appears).
8. Repeat the above steps for each overbooked item that will be fulfilled by a purchase.

Viewing Sub-Rental and Projected Purchase Records

Sub-Rental and Projected Purchase records can be viewed by accessing the **Sub-Rental Menu** from the **Counter Menu**. Use the **Equipment Enquiry** option to search and view equipment with either type of record.

To view sub-rental and projected purchase records, search for the equipment in question. Highlight the item and press ENTER to select it. This brings up the **Active Sub-Rental / Projected Purchase** screen.

Subrental/Projected Purchases Detail

Item #TRE 0000 MANHOLE CASE SHORING

Location:	20	IMS TOOL STORE DEMO
SUB/Purchase	SB	
Vendor	ACTION	ACTION TIRE CO.
PO	564-01	
Quantity	2	
Pickup Date	11/08/2005	
Return Date	11/11/2005	<input type="button" value="Open_Tickets"/>
Expected Rcv Date		
Date Received		
Cost		100.00
Cr Clerk Init:	IMS	IMS

2. Click F6Chng
3. Change the status by entering the new status code, or click the down arrow for a list of codes. There are four codes: **PC** (cancel purchase), **PR** (purchase), **SB** (sub-rental), **SC** (cancel sub-rental).
4. Press **ENTER** to move through all the other record fields and change any information you need. You can also press **TAB** skip all other fields and save changes.
5. Confirm the changes by clicking Accept Changes on the pop-up box.
6. If a change was made, then you will need to enter a reason for the change. Press **ENTER** when you are finished entering the reason for the change.

NOTE: To view open tickets that are affected by the sub-rental or projected purchase, click **Open Tickets**.

Sub-Rental Reports

Contents

Sub-Rental Pickup / Returns Report
Sub-Rental Changes Report
Overdue Projected Purchases
Cancelled Sub-Rentals / Purchases
Excess Sub-Rental Report

Sub-Rental Pickup / Returns Report

This report allows you to run either a sub-rental pickup report or a returns report. The report can be run by date range and is sorted by vendor.

Information displayed on the report:

Column name	What is displayed in the column
Vendor	Vendor number and name
Item	Rental class and fixed asset number with description of sub-rented item
Return Date	Date sub-rental was to be returned
Qty	Quantity of that item that was sub-rented

Sample Sub-Rental Returns Report

SubRental Return List

Store: Alert DEMO STORE Location: 100 From Date: 05/31/05 To Date: 06/07/05 Date/Time: 06/06/05 12:07 PM Page: 1

Item	Return Date	Qty
Vendor: 104 ELKAY PRODUCTS CO INC 4503 0000 HAND TOOLS-C	05/31/05	2
Vendor: 108 ESSEX SILVER LINE CORP 5410 0000 MORTAR BOX	05/31/05	2
Vendor: 120 THE TABLECLOTH CO 1561 0000 ROLLER-PULL 36"	05/31/05	1

Sub-Rental Changes Report

The **Sub-Rental Changes Report** lists any sub-rental or projected purchase record that was changed during the specified date range. The report is sorted by Vendor. Reasons for the change are listed under each sub-rental or purchase item.

Information displayed on the report:

Column name	What is displayed in the column
Vendor	Vendor number, name, and phone number
Item	Item number and description of item.
Ty	SB (sub-rent) or PR (purchase)
Pickup Dt	Date item was picked up (sub-rent only)
Return Date	Date sub-rental was to be returned
PR Expect Dt	Date projected purchase was expected
Last Change	Date the last change was made to the record

Sample Sub-Rental Changes Report

Store: Alert DEMO STORE

Location: 100 From Date: 05/25/05 To Date: 06/07/05 Date/Time: 06/06/05 12:12 PM Page: 1

Item	Ty	Pickup Dt	Return Dt	PR Expect Dt	Last Change
Vendor: 0 NONE	Phone:				
8562 0000 SKID STEER POST DIG ATTACH (ON Need More Qty	SB	05/29/05	06/12/05		05/28/05
8564 0000 SKID STEER POST HD AUGER 10.5" Need More Qty	SB	05/29/05	06/12/05		05/28/05

Overdue Projected Purchases

The **Overdue Projected Purchases** report lists all purchases that have not been received into Alert by the expected date that was entered at the counter. The report is sorted by Vendor.

The screenshot shows a software interface titled "Overdue Projected Purchases Report Input Screen". At the top, there are menu options: "F6Chng F8Run Acthlp" on the left and "F1Help F0Back" on the right. Below the title bar is a "Function" dropdown menu. The main area contains several input fields:

- Location:** "Select All Locations" with a "Y" button and "Enter Location" with an empty text box.
- Date:** "5. Starting Date" with a date field containing "05/21/2005" and "6. Ending Date" with a date field containing "06/22/2005".
- Output:** "To Screen" with a "Y" button and "To Printer" with an "N" button.

At the bottom, there is a footer: "For more information, press F10, then press F1Help" and a row of function keys: "F1Help", "F2", "F3", "F4", "F5", "F6Chng", "Acthlp", "F8Run", "F9", and "F0Back".

Information displayed on the report:

Column name	What is displayed in the column
Vendor	Vendor name
Item	Rental class and fixed asset number
Item Name	Description of item
Expected	Date purchase was expected to be received
Expected Qty	Quantity of item that was expected

Sample Overdue Projected Purchases

Overdue Projected Purchases Report				
Store Name: Alert DEMO STORE	Location: 100	Date Range: 05/25/05 - 06/07/05	Page: 1	
Vendor	Item	Item Name	Expected	Expected Qty
NONE	8563-0000	SKID STEER ADDL B'KET/BLADE/FO	30-MAY-05	1
NONE	8564-0000	SKID STEER POST HD AUGER 10.5"	30-MAY-05	1
NONE	8381-0000	STEP LADDER 10'	30-MAY-05	1
PORTABLE HEATER PARTS	8320-0000	EXTENSION LADDER-ALUM. 20'	30-MAY-05	1
ESSEX SILVER LINE CORP	1270-0000	2 JAW PULLER-LG (131,132)	30-MAY-05	2

Cancelled Sub-Rentals / Purchases

The **Cancelled Sub-Rentals / Purchases** report lists all sub-rentals and projected purchases that have been cancelled. The report is sorted by Vendor.

Information displayed on the report:

Column name	What is displayed in the column
Vendor	Vendor number and name
Item	Rental class, fixed asset number and name
Cancel Date	Date sub-rent or purchase was cancelled
Qty	Quantity cancelled

Sample Cancelled Sub-Rentals / Purchases

Cancelled Sub Rental List
 Store: Alert DEMO STORE Location: 100 From Date: 06/01/05 To Date: 06/07/05 Date/Time: 06/06/05 4:08 PM Page: 1

Item	Cancel Date	Qty
Vendor: 152 WINDSOR INDUSTRIES		
8384 0000 STEP LADDER 16'	06/06/05	1
8370 0000 "A" FRAME LADDER	06/06/05	1

Excess Sub-Rental Report

The **Excess Sub-Rental Report** lists scheduled sub-rentals that appear to be unnecessary based on quantity on hand, quantity needed to fulfill orders, and existing sub-rentals.

The screenshot shows a software window titled "Potential Excess SubRental Report Input Screen". At the top, there are menu options: "F6Chng F8Run Acthlp" on the left and "F1Help F0Back" on the right. Below the title bar, there is a "Function" dropdown menu. The main area contains two sections of input options:

- Location:** "Select All Locations" with a "Y" checkbox and "Enter Location" with an empty text box.
- Output:** "To Screen" with a "Y" checkbox and "To Printer" with an "N" checkbox.

At the bottom of the window, there is a row of function key buttons: "F1Help", "F2", "F3", "F4", "F5", "F6Chng", "Acthlp", "F8Run", "F9", and "F0Back".

Information displayed on the report:

Column name	What is displayed in the column
Item	Rental class and fixed asset number
Description	Item description
Date	Pickup date for sub-rented items
Qty Needed	Quantity needed to fulfill current orders
Current Qty	Quantity on hand in store
Current Sub Qty	Quantity of item currently sub-rented
Upcoming Sub Qty	Quantity scheduled for sub-rental

Sample Excess Sub-Rentals Report

Store Location: 100 Alert DEMO

Item	Description	Date	Qty Needed	Current Qty	Current Sub Qty	Upcoming Sub Qty
8371-0000	LADDER JACKS -PR.	06/09/05	0	2	0	1
8381-0000	STEP LADDER 10'	06/08/05	0	3	0	1
		06/09/05		0	3	0
						1