Alert EasyPro

Setup Manual

Version 9.0

By Alert Management Systems

Contents

Getting Started

Contents

Welcome

Congratulations on your purchase of Alert EasyPro. This manual will step you through the tasks you need to accomplish to get Alert EasyPro up and running smoothly at your rental operation. Then, after your system is properly set up, you can use this manual for reference when you need to update your system codes and parameters.

If you are using this manual for reference

If your Alert EasyPro system has already been in use for some time and you are using this manual to look up information when updating or changing your system's setup, you can skip the rest of this chapter and the next chapter and move directly to the chapter that covers the parameter or code you wish to update. Check the table of contents and index to locate the information you want to change.

If you are using this manual as a guide for the initial setup of your system

If you have just purchased Alert EasyPro and are using this manual to guide the initial setup of your system, read the rest of this chapter and the next chapter. Pay particular attention to the section entitled "Initial Code Entry Checklist" below. Make a photocopy of this checklist and use it to enter codes in the proper order.

When you begin entering codes and parameters, watch for special notes included just for those setting up Alert EasyPro for the first time. These notes are formatted like this example:

INITIAL SETUP: Follow the correct order of code entry!

Proper initial setup will ensure success and avoid problems later

To effectively utilize all of the features Alert EasyPro offers, it is important that the system be set up properly prior to your use of it on a daily basis. Briefly, here are the tasks that need to be completed before you can begin to use your Alert EasyPro system at the counter.

Step one: entering codes

Some of the information you'll be entering into Alert EasyPro during the daily operation of your rental store is best entered using what are called **code fields**. **Code fields** are simply fields in which acceptable answers are already entered on the system as predefined **codes**. All of these codes should be set up before you begin using Alert EasyPro.

For instance, when entering a zip code at the counter, the system can be set up to automatically enter the city and state associated with that zip code, and even correctly select the correct tax area and delivery charge.

Codes save you time when entering information into your system. Also, since codes provide standardized entry of data, they allow you to define criteria for which customers, rental equipment, etc. appear on reports.

The code files you need to set up include:

- **System Wide Codes**
- **Rental/Sales Item Codes**
- **Customer Codes**
- **GL Account Codes**
- **Time Card Codes**
- **Default Sets**
- **Credit Warning Parameters**
- **Print and Screen Note Library**

Since this manual is used once for initial entry of codes, but used many times for reference, we have organized the codes into chapters and sections according to their appearance in Alert EasyPro menus.

However, if you are entering codes for the first time, you will need to follow a specific order in entering codes in order to set them up correctly. For this purpose, we have provided an **Initial Code Entry Checklist** (see below).

Step two: customize your Alert EasyPro system

Alert EasyPro can be customized to better fit your particular way of doing business. These customizations are set using an option called **Store Parameters**. **Store Parameters** should be reviewed before you begin using your Alert EasyPro system. For more information, see "Customizing your system with Store Parameters" on page 87.

NOTE: Alert will initially set up **Store Parameters** for you, based on information you give Alert when you purchase the system. However, you should review all parameters prior to "going live" on your Alert EasyPro system, since changing some codes after beginning to use the system can complicate financial reporting.

Step three: begin data entry

When your system has been customized and all relevant codes have been added to the system, you can begin to enter your rental items.

Initial Code Entry Checklist

Use this checklist to enter codes in the correct order. The table shows the program name and a column for you to check when this code entry is complete.

The Required/Optional column indicates whether this code file must be entered before going live at the counter. Optional items can be entered at any time; however, you should review all codes and enter as many as possible so you can take advantage of the features they provide.

Code Entry	[R]equired, [O]ptional	Done
GL Account Codes	R	
Rental/Sales Item Codes	R	
Sales Tax Tables	R	
EasyPro System Users	R	
Customer Codes	R	
Customer Business Types	R	
Phone Types	R	
State Codes	R	
Zip Codes	R	
Delivery Area Codes	R	
Pro-ration Tables by Store	R	
Holidays	R	
Default Sets	R	
Credit Warning Parameters	O	
Keyword Parameters (see table of contents)	O	
Commissioned Sales People	O	
Time Card Parameters	O	
Time Card Codes	O	
Print and Screen Note Library	O	

Introducing Alert EasyPro

Contents

Using this manual

Alert EasyPro is very flexible. The common tasks you'll be using this software for -- writing contracts and reservations, giving quick quotes, and checking in equipment -- can be done quickly and simply. Because Alert EasyPro is so flexible, you can complete a task in just about any order you like.

Some conventions

Bold lettering is used to highlight particular text. For instance, every time a new term is introduced, and whenever you are asked to choose a particular option, select a Menu option, or press a particular key, these options are presented in **bold letters**.

If you're a beginner

If you have just begun using Alert EasyPro, read through this first chapter first. It will help you master the basics of navigating through the system, selecting items, and using the **Pull-down Menu** to perform counter tasks.

Since this manual is designed primarily for reference, you won't find procedural instructions on the most basic procedures – like how to write a rental contract. For quick, step-by-step instructions for these basic counter procedures refer to the Quick Start Manual. This Windows-based, compiled Help file provides fast help on common counter procedures.

TIP: **Quick Start** can also be purchased from Alert as a printed, small format manual – perfect as a reference tool for your front counter.

When you've mastered the "basics"

Once you get a feel for how to use the system, you can use this manual as a reference guide -- to explain a feature you haven't used before. Pretty soon, you'll be able to complete any counter task with ease.

Alert EasyPro active help

Alert EasyPro is designed to be easy to use. On-line help gives you answers to questions you may have without having to refer to a written document.

The drop-down arrow

On some fields a small **drop-down arrow** is displayed to the right of the field. Click on the drop-down arrow to view available choices, and then click the choice you want.

The Coach Line

The bottom line on your screen is called the Coach Line When you are completing a task, messages appear on this line to "coach" you through the process.

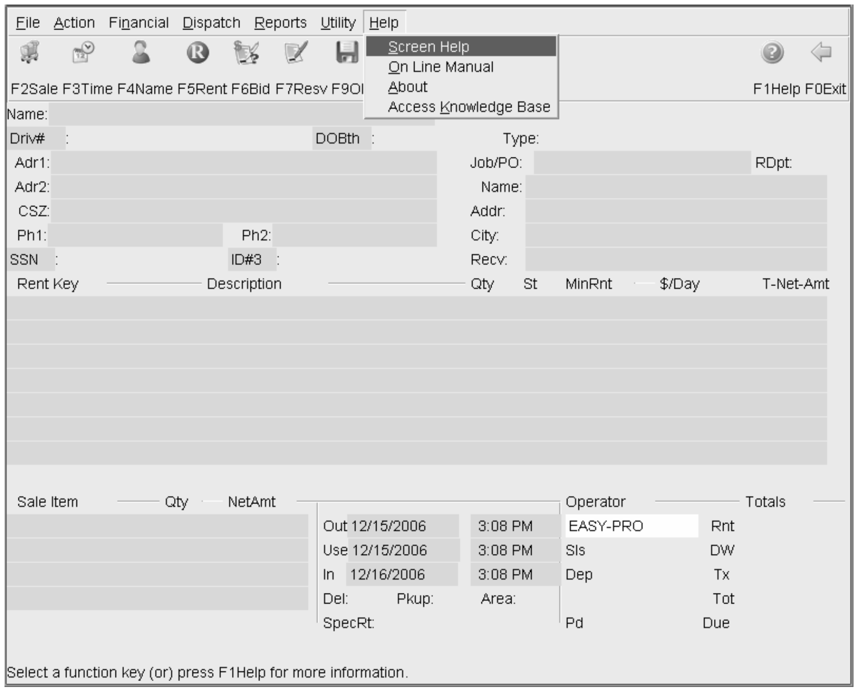
For instance, as you select rental equipment, the Coach Line displays a number of helpful hints for you, from telling you how to select a piece of equipment to explaining your options for entering information into fields.

The Help button

The Help button appears on the Toolbar, you can click it to view a screen of information that explains your options for the particular screen you are viewing.

Help pull-down menu

The Help pull-down menu provides contextual help, complete manuals in PDF format, and web based help (via the Knowledge Base).



Understanding conventions

As you move through the Alert EasyPro system, there are conventions, or common ways of doing things, that apply no matter where you are or what you're doing. These conventions include cursor positions using the **Toolbar**, using pull-down menus, using the **ESCAPE**, **TAB**, and **arrow** keys, and selecting items from an **index**.

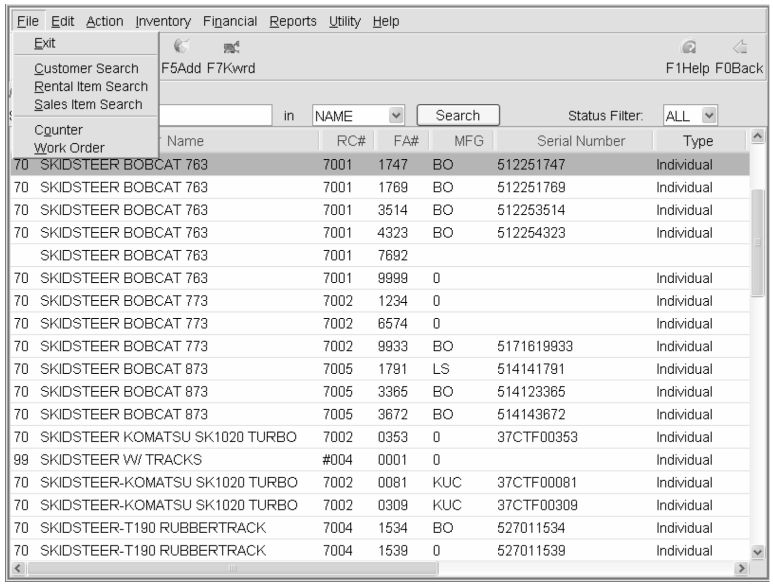
Cursor positions

Your cursor is the flashing block, vertical line, or underline that marks where you are on the screen.

When you do not see your cursor, you are at the function level. This simply means that your next action should be to click on a select an option from one of the pull-down menus.

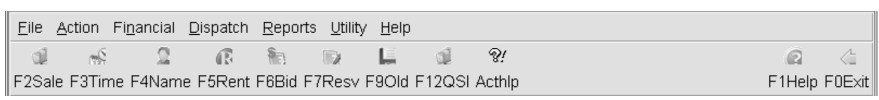
When your cursor is positioned in a field, you are at the field level. This means that your next action should be to type information into the field, or, if available, click the Help button to pop up a list of options.

The Pull-Down Menu



The Pull-down menus are located at the top of the Alert window. These menus are used to navigate through the Alert system, and access additional features in Alert.

The Toolbar



The **Toolbar** is a line of icons at the top of your Alert EasyPro screen. **Toolbar functions** – that is, the buttons you can select on the Toolbar – change depending on what screen you're on and what task you are engaged in. To use a function, click on the corresponding icon.

TIP: All Toolbar functions can be selected either by clicking or by pressing a corresponding function key. Many of these functions are also available on the pull-down menu. If you place your mouse over an icon, a label will appear. This label denotes the **function key** you can press to select this function. So, for instance, you can change the term of a rental by either clicking the icon or by pressing the **F3** function key (at the top of your keyboard).

Using the ESC key

The **ESC** (Escape) key can be used to back up one level in the system. This key can be used any time. If you are in a field, pressing the **ESC** key will remove your cursor from the field, abandon all changes you made, and bring you to the function level. If you are at the function level, pressing **ESC** will take you back to the previous screen or to the previous menu.

Using the arrow keys

Arrow keys can be used to move from field to field To move forward one field, press the down arrow key. To move backward one field, press the up arrow key. You can also move left and right using the arrow keys to edit the information in a field.

Using the TAB key

Use the **TAB** key to skip certain fields. The **TAB** key is automatically programmed to skip past optional fields and stop at required fields of entry. Experiment with the **TAB** key to find out how you can use this key to move more quickly through a screen of fields.

Selecting from an index

When an index (for instance, an alphabetical listing) appears on your screen, click on the item or customer you desire to select it. If the item doesn't appear on the list, click  (previous) and  (next) to move up and down through the listing.

TIP: You can also use your up and down arrow keys to highlight the item you want from the list -- then press **ENTER** to select it.

Generally Available Options

The following options appear on most screens throughout the Alert EasyPro System.

F1Help

The **Help** button is available on most screens. The Help function works in two ways.

If your cursor is positioned on a field and the **Help** button is displayed, you can click the **Help** button to pop up a list of available codes to enter into the field. (The Help button is not displayed when editing non-code fields.)

If your cursor is in the Function box, clicking **Help** pops up a help file explaining how to use the screen you're on.

File – Exit to Main Counter Screen

Select **Exit to Main Counter Screen** from the **File** menu from any screen in the Counter System.

F10Back

Click the **Back** button (located on the right hand side of the toolbar) to move backward one level. This button will either move you to the previous screen or will quit whatever process you are working on.

Options on search screens

While searching for a rental item, a sales item, or a customer name, the following Toolbar functions will always be available to help in your search.

F2Prev

Use the **Previous** button to move up through the listing. For instance, if you are viewing an alphabetical listing with items starting with "B," clicking this button would bring you up through the alphabetical listing to the items beginning with "A".

F3Next

Use the **Next** button to move down through the listing. For instance, if you are viewing an alphabetical listing with items starting with "C," clicking on this button would bring you down through the alphabetical listing to the items beginning with "D".

F4Find

Click **Find** to begin another search. After clicking **Find**, type in the item you want.

Menu options: add, change, delete mode

When your cursor is positioned in the Function box, you can use the pull-down menu to add another item, delete an item, or change an item. This is called **Add, Change, and Delete mode**.

Edit – Add or F5Add

Select **Add** from the **Edit** pull-down menu. This function is used to add an item.

Edit – Insert

Select **Insert** from the **Edit** menu to insert an item in the middle of an existing list. For instance, you would use this option to insert an accessory to an air compressor next to the air compressor on the rental ticket.

Edit – Change or F6Chng

Select **Change** from the **Edit** pull-down menu. Use this function to change the information you have already entered. For instance, you would use this button if you want to change the quantity of a rental item being checked out or to change the amount being charged for a sales item.

Edit – Delete or F4Del

Click on the item you want to delete, and then select **Delete** from the **Edit** pull-down menu.

Customizing search screens

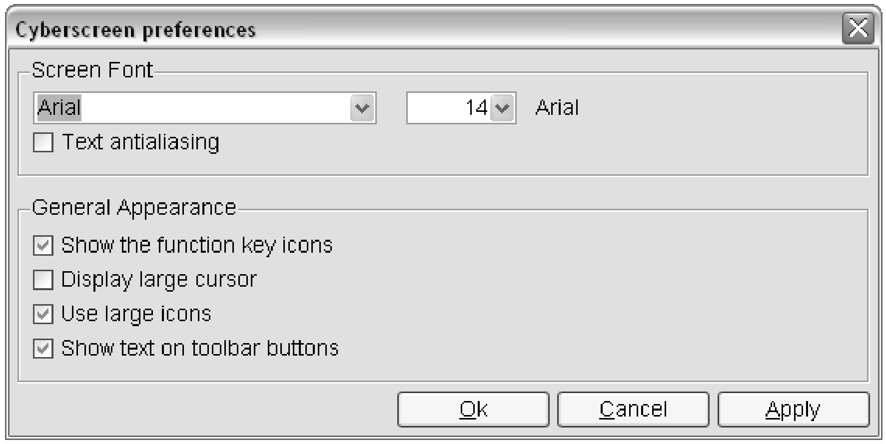
In Alert, you can select what columns of information you want displayed from a list of options. On the search screen, with your cursor in the function box, you can right-click your mouse on any column header to select or de-select column information.

For example, on the Fixed Assets Search screen (see below), a right-click brings up the menu in the middle of the screen. Left-clicking on an option will either select or de-select it.

Column width can also be modified by using your mouse. Your mouse will change to a horizontal arrow between columns. Just click and drag until the column is the desired width.

Terminal preferences

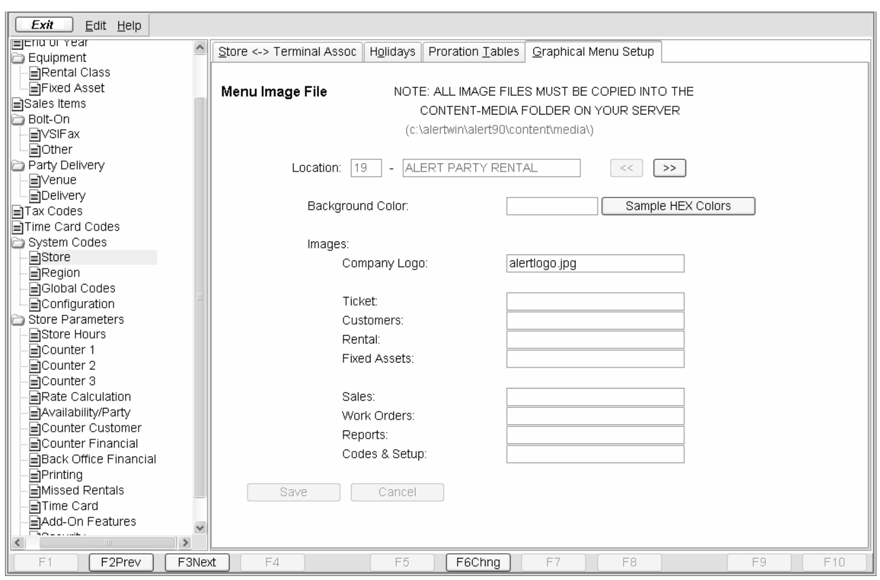
There are various preferences that can be changed that effect the way Alert appears on your screen. Select **Terminal Preferences** from the **Maintenance** menu to adjust preferences. You can adjust font, show or hide the function keys, etc. Change the preferences until you determine what view works best for you.



Graphical Menu Setup

The graphical menu can be customized by store location to display user selected icons and background color. To customize the **Graphical Menu**, from the **Main** M**e**nu select **Codes and Setup** then **Graphical Menu Setup**.

Graphics and icons can be selected for the store logo and each of the application buttons on the main menu. The files may be gif or jpeg. The files must be copied to the server into the c:\alertwin\content\media folder on Windows servers or to the /alertii/content/media folder on Unix/Linux servers.



Web Links and Favorites

Web Links

Web Links have been added to the graphical menu to allow users to manager their own links instead of using preset links. A right-click on the **Web Links** section allows the user to **Add**, **Change**, or **Delete** a link. Double-clicking on the link or selecting the **View** option from the pull-down menu will allow the user to access the link.

Web-Links can be entered in two formats: http://www.alertms.com or www.alertms.com.

Favorites

A **Favorites** section has been added to the graphical menu to allow users to add the most frequently used reports or screens to this section. A pop-up menu, accessible with a right-click, allows the user to access or delete and entry. Double-clicking on a favorite list item will take the user to the selected screen or report. Entries are displayed in alphabetical order.

How to add Favorites:

1. Access the report input screen or access screen that you want to add to the favorites list.
2. Select the Help then select Add to Favorites.
3. The selection will be added to the Favorites list.

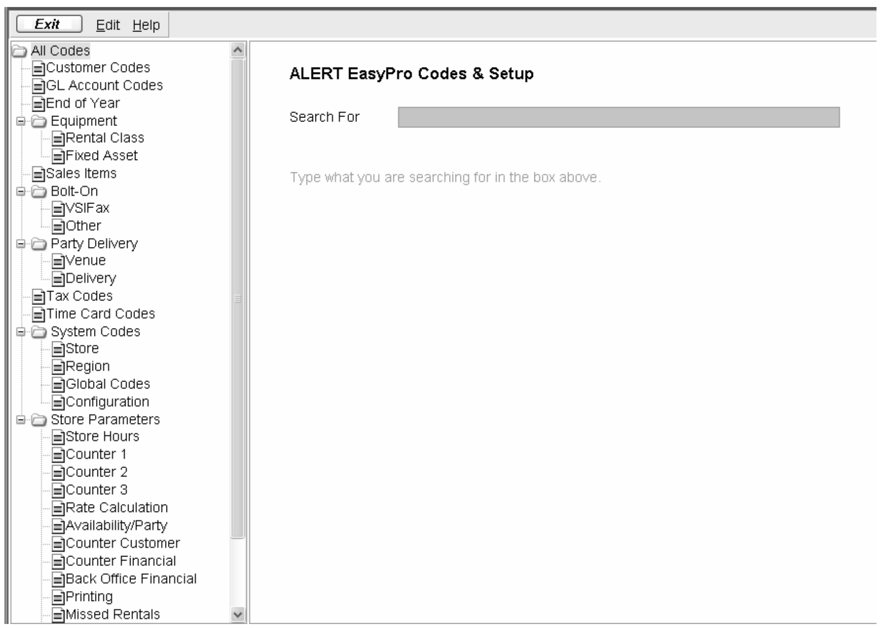
System Wide Codes

Contents

What are System Wide Codes?

The various options found on the **System Wide Codes Menu** allow you to enter abbreviations, codes that are used throughout the system, and other information needed to effectively use your Alert EasyPro system. Because system wide codes are used extensively throughout the system, it is important to enter them correctly and keep them up-to-date. The **Store Parameters** option will not be covered in this section. A separate chapter has been set aside to cover the information found there.

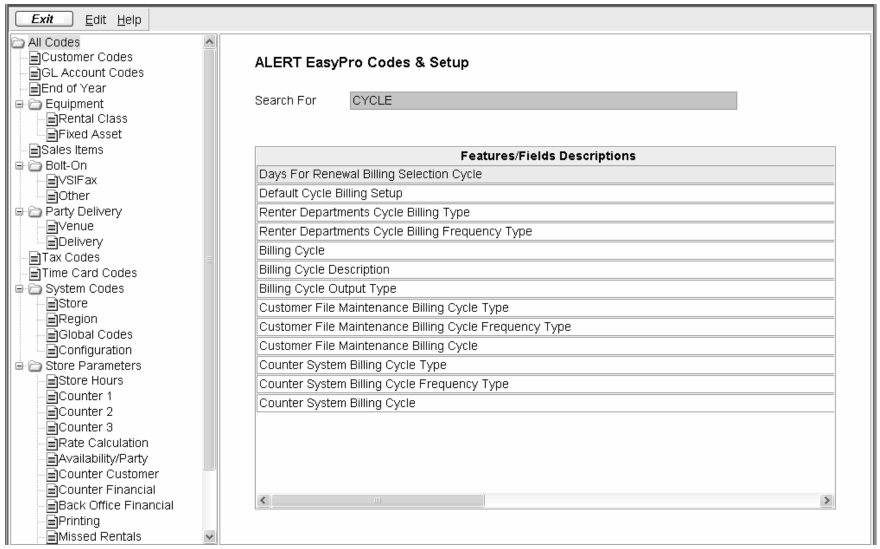
To add or change codes, expand **System Wide Codes** in **Codes and Setup**.



The left-hand side of the screen lists the different folders and screens available in Codes and Setup. The right-hand side will display the code screen (when one is selected) or the Search screen.

Searching for Codes

To search for a specific code, type a keyword(s) into the Search For text box. For example, type Cycle to find codes for Cycle Billing, or type Rate to find parameters that effect rental rates.

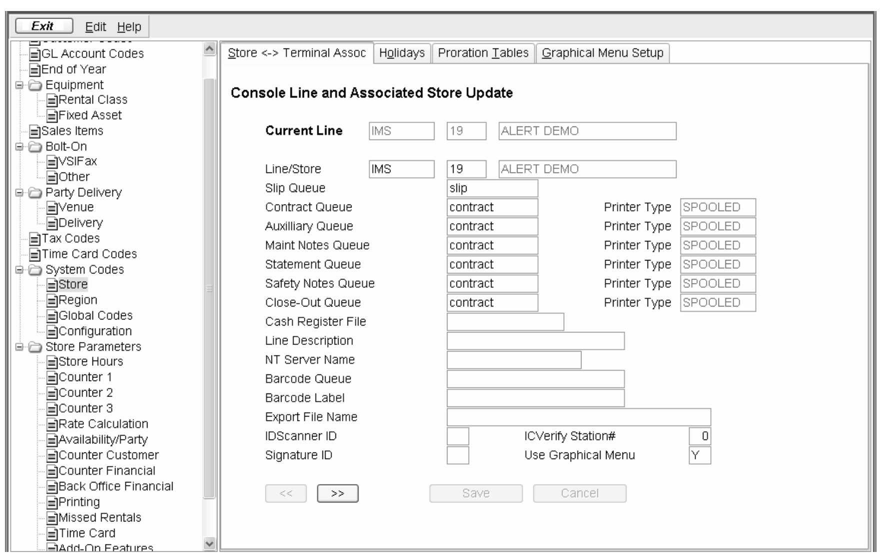


Use your arrow keys to highlight the parameter you were looking for and press Enter. You can also double-click on the parameter.

To search for another parameter select **Search for Setting** from the **Help** menu.

Store <-> Terminal Association

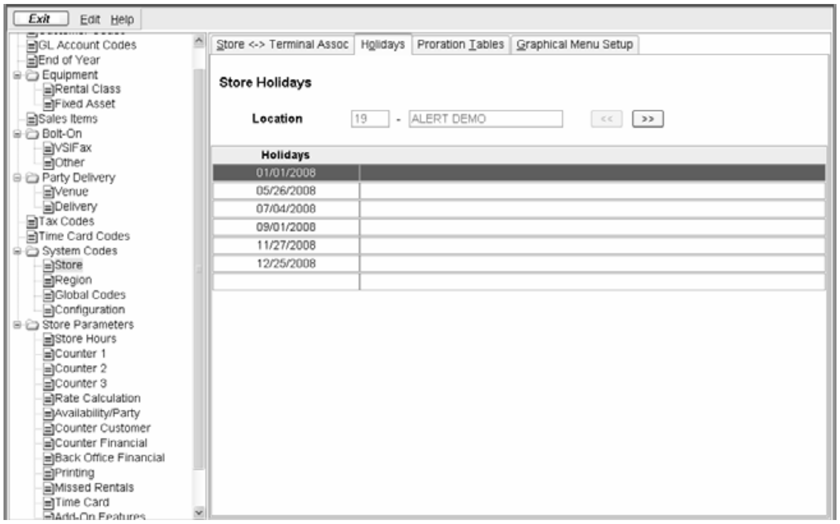
NOTE: This parameter file is used by Alert to associate each terminal (or PC workstation) set up on your system with its correct store location. The parameter should not be changed without assistance from Alert staff.



Holidays

This file lists the holidays for which your store is closed during the current year. This list should be updated at the beginning of each year.

To edit **Holidays**, under **System Codes**, select **Store**. Then click on the **Holidays** tab.



Field Descriptions

Location

NOTE: This field only needs to be changed by multi-store locations.

This field shows the store location for which the holidays are listed. To see the holiday for a different store, click the left and/or right arrow buttons next to the store location.

Holidays

This field lists the dates for each holiday during the current year. To enter or change a date, use the format **MMDDYYYY**.

Pro-ration Tables by Store

Rental items can be charged according to two basic calculation methods: fixed and pro-rate. Pro-rated rental rates use the rate structure entered and then pro-rate additional units of rental beyond the base rate.

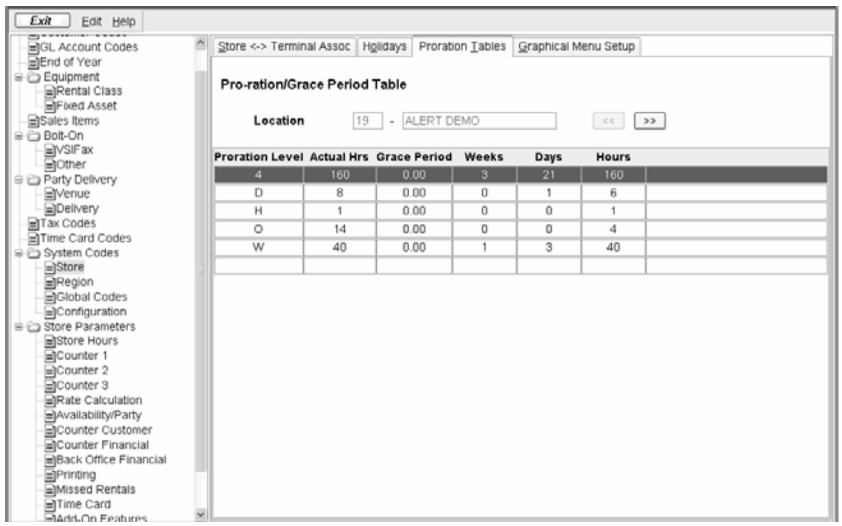
For instance, if a customer rents an item for eight days, the system will charge the base weekly rental rate, plus a pro-rated fraction of the weekly rental (perhaps 1/7 of the weekly rate).

If a fixed rate system is used, for the same rental, the system would charge the base weekly rental rate, plus the daily rate (to arrive at a total of eight days).

Since the effective daily rental rate typically decreases the longer an item is out on rental, using a fixed rate almost always results in a higher rental charge.

Pro-ration Tables define how the system calculates the "fractions" of rental rates to use when charging for additional time beyond the base rental rate.

To edit **Pro-ration Tables by Store**, at the **Codes and Setup Menu**, under **System Codes** select **Store**, the click **Pro-ration Tables**.



Field Descriptions

Pro Rate Level

This column shows the rental period. The **4** stands for four weeks, **D** for daily, **H** for hourly, **O** for overnight, and **W** for weekly.

Actual Hours

This column shows the number of actual hours in the rental rate. For example, depending on how you calculate daily rentals, it may show 8 hours for a daily rate.

Grace Period

This is the amount of time (in hours) that you allow equipment to be returned late before charging the customer for additional time.

Weeks

The number in this column represents the proportion of the Pro-ration Rate that you charge for each week overdue. For example, if the customer has a tractor out for 5 weeks, and you charge 1/5 of the 4 week rate for the extra week, enter 5 in this column.

Days

The number in this column represents the proportion of the Pro-ration Rate that you charge for each day overdue. For example, if equipment is out 4 weeks and one day, and you charge the customer 1/7 of the weekly rate for the extra day, enter 7 in this column.

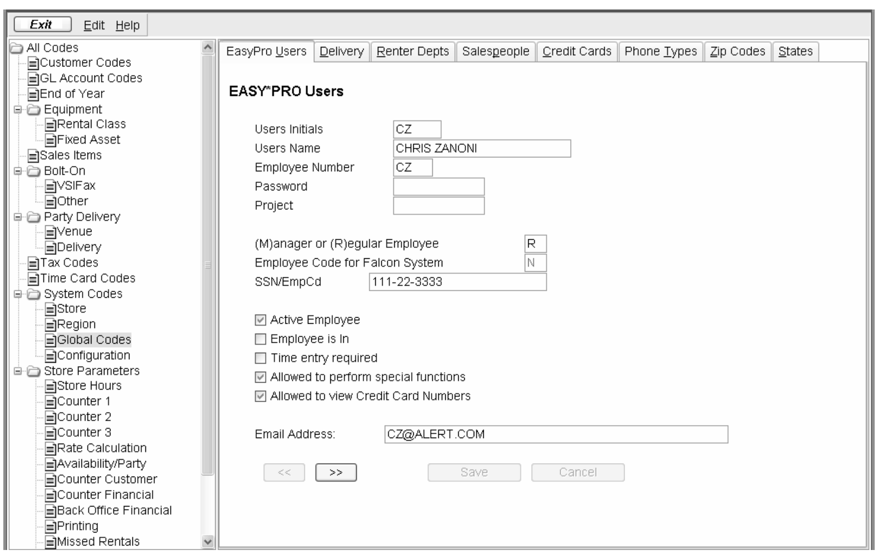
Hours

The number in this column represents the proportion of the Pro-ration Rate that you charge for each hour overdue. For example, if equipment is out 9 hours, and you charge the customer 1/6 of the daily rate for the extra hour, enter 6 in this column.

EasyPro System Users

This file lists the employees who use the Alert EasyPro system. The initials entered here will be the initials entered at the beginning of each new ticket at the counter screen or during financial processing.

To edit **EasyPro System Users**, at the **Codes and Setup Menu**, select **Global Codes** under the **System Codes** folder**. EasyPro Users** is the first tab**.**



Field Descriptions

User Initials

Enter the initials or employee number. The three character code will be this employee's operator ID and will be the initials required to sign onto the counter.

User's Name

Enter the name of the Alert EasyPro user here.

Emp

Enter the employee's initials.

Password

If you want a password to be required when this employee clocks in, enter the password here.

NOTE: This field is needed only if you have purchased the **Time Card System** (an advanced module sold separately).

Project

If this employee always works on a given project, enter it here.

Type

Enter **M** for manager (if you want this employee to have access to all override and report features). If not, enter **R** for regular employee.

SSN

Enter this employee's social security number.

Active

Place a check mark in the box (by clicking) if the employee is active.

In

NOTE: This field notes whether the user is currently signed on and is updated by the system.

Required

If this employee must be clocked in before he or she can use the counter, then place a check in the box (by clicking).

NOTE: This field is needed only if you have purchased the **Time Card System** (an advanced module sold separately).

Special Functions

When you flag this field, you are providing this user with the ability to perform certain functions above what a regular employee can perform. These functions include: allowing the approval of rental to a bad guy or a customer over their credit limit, allows the user to reopen a ticket after the first day in the counter and work order system, allows the tax to be adjusted on the payment screen (options 3, 5, & 6), and the user is allowed to cancel finance charges on the Customer Payment Processing Menu.

Credit card viewing

This field is used when the credit card security features is enabled (Store Parameters, page 9, field 6). Place a check mark if you want this user to have the ability to view the full credit card number at the counter and in customer file maintenance.

Email

If you would like to keep track of your employees email address, then enter it in this field.

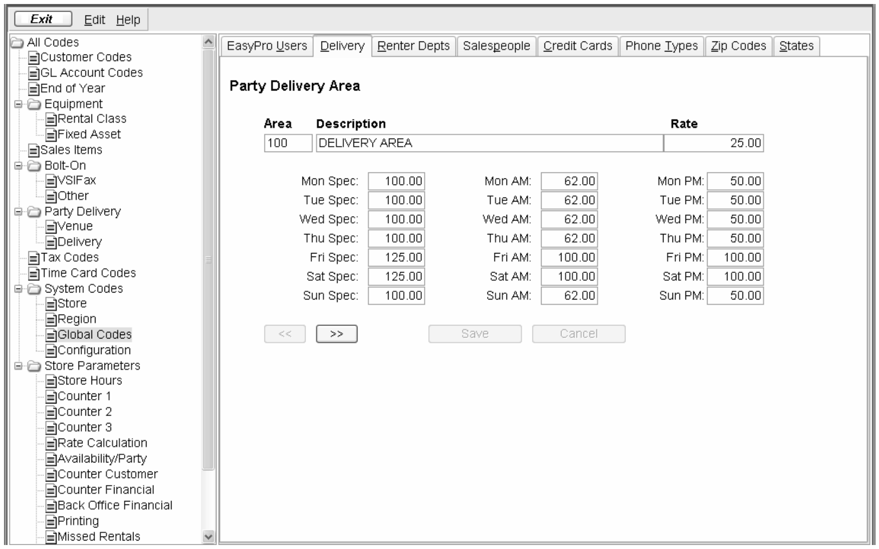
Adding Users via the Operator Menu

Alert users can be added via the **Operator Menu**. The steps below outline the process to be used when adding the users.

1. Add the user to the server with a valid username and password.
2. Login to Alert as either **ims** or **administrator**, the operator menu will be an available option
3. Select option number one, **Create New Users**
4. The password to this menu option is **promgr**
5. You will be able to add the user's default information
6. Add the user to **EasyPro System Users** as described in the previous section.

Delivery Codes

To edit **Delivery Codes**, in **Codes and Setup**, under **System Codes** select **Global Codes** and then click the **Delivery tab.**



Field Descriptions

Del Area

Enter the delivery code for this area here. This may be a numerical code (i.e. zip code) or an abbreviation of the area name. (This field has a 5 character limit.)

Description

Enter the full name of the delivery area.

Rate

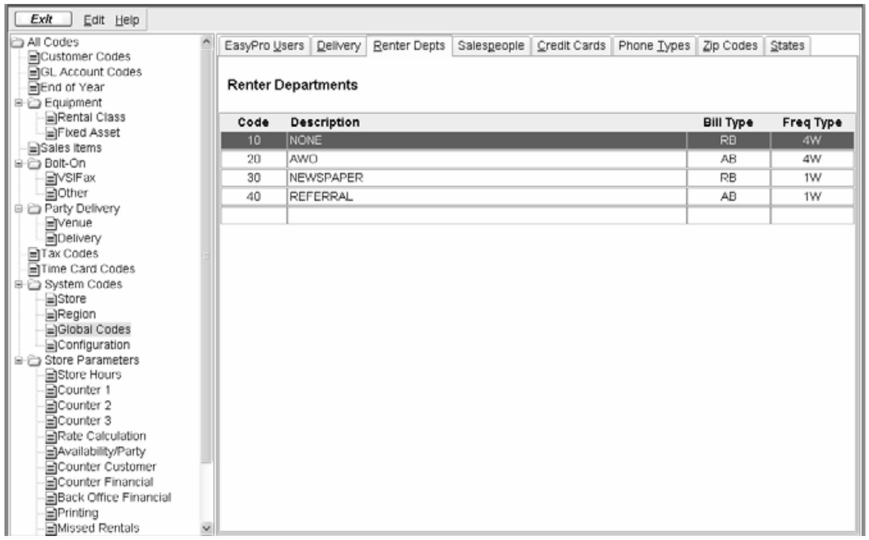
If you charge for delivery to this area, enter the amount here. This amount will be the default amount charged to tickets which include a delivery to this area.

Renter Department Codes

Renter Department Codes are typically used to classify the type of customer on a particular transaction. (This information is often used for insurance purposes to classify contractor vs. homeowner, etc. and can also be used as a marketing tool.) If your store uses this feature, after entering a customer at the counter, you will be asked to enter a Renter Department.

NOTE: The use of Renter Department Codes is specified in Store Parameters.

To edit **Renter Department Codes**, select **Codes and Setup**, under **System Codes**, click on **Global Codes**. The third tab (across the top) is **Renter Depts**.



Field Descriptions

Code

Enter a two character code for this renter department. (The code can be numbers and/or letters.)

Description

Enter the name of this renter department.

Bill Type

Choose either **AB** (advanced bill) or **RB** (renewal bill) as the default cycle billing type when writing new tickets. This will only apply if you indicate that the Renter Dept will be used for Cycle Billing.

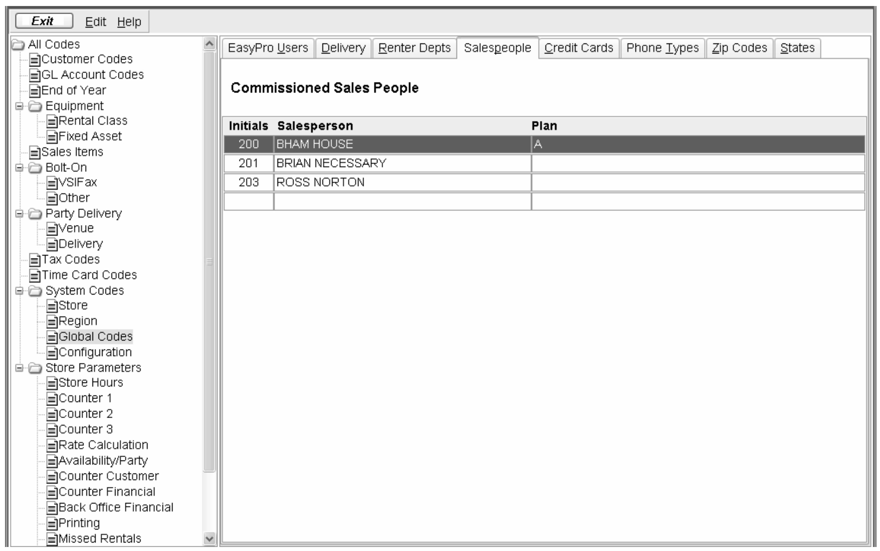
Freq Type

Enter the frequency type for advance or renewal billing.

Commissioned Sales People

Enter the names of your commissioned sales people into this file. Sales people set up in this code file can be linked to a customer's account. Then, reports can be created that show the business received by each salesperson's customer base.

To edit **Commissioned Sales People**, at the **Codes and Setup Menu**, under **System Codes** select **Global Codes**. **Salespeople** is the fourth tab.



Field Descriptions

Initials

Enter the sales person's initials here.

Sales person

Enter the name of the sales person here.

Plan

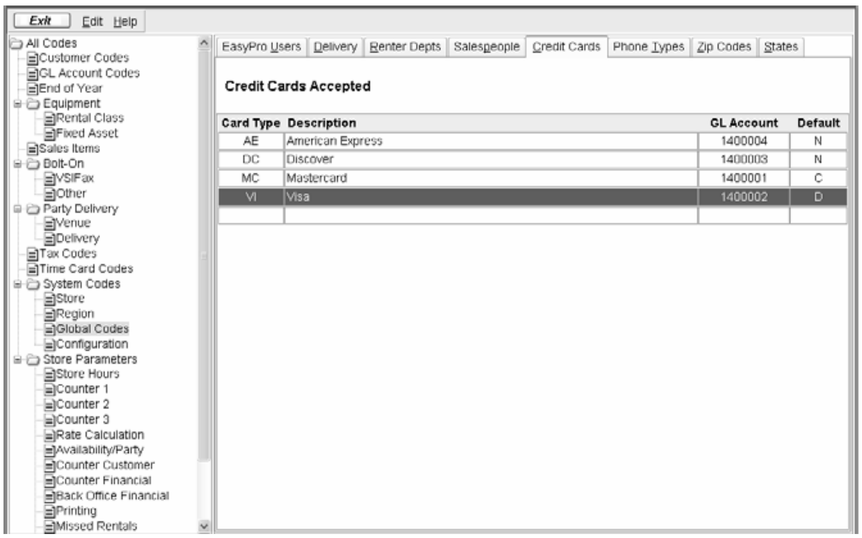
If the sales person is on a specific commission plan, you may enter a brief description of that plan here.

NOTE: The Plan field is for information only.

Credit Cards Accepted

This file holds the credit cards that your store accepts. The cards listed here will be used at the Pay box when collecting payment on a ticket.

To edit **Credit Cards Accepted**, at the **Codes and Setup Menu**, under **System Codes** select Global Codes. **Credit Cards Accepted** is the fifth tab.



Field Descriptions

Credit Card Type

Enter a credit card code. (Common codes include **MC** for Master Card, **VI** for Visa, etc. (This field has a two character limit.)

Description

Enter the name of the credit card here.

GL Account

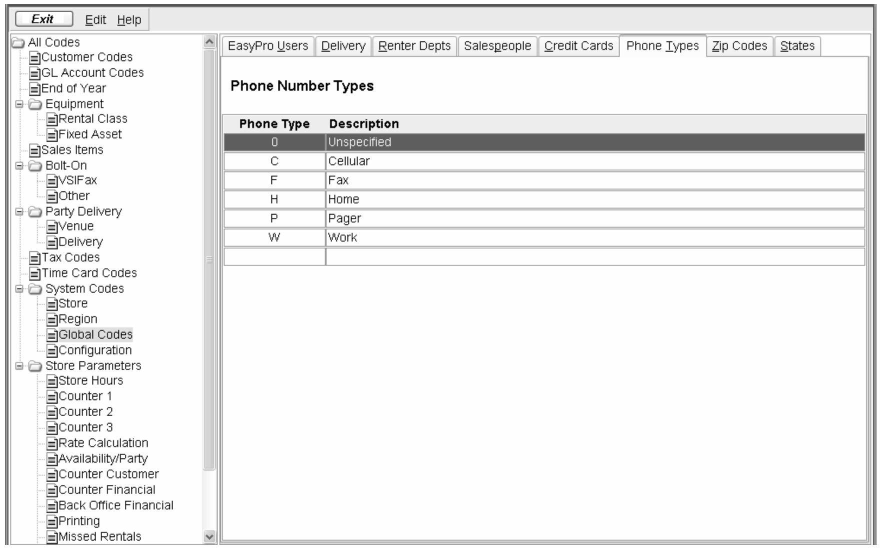
If credit card types are to be broken down by GL Account, then select a GL account for each credit card type.

Default

Enter a **C** for the default credit card GL account or enter a **D** for the debit card default GL account. The default type will be used for prior credit card payments from **Customer Financial Processing** which were not broken down by actual card type. The default credit card GL Account will also be used if you want to separate credit card entries, but do not need to break them down by card type.

Phone Type Codes

To edit **Phone Types**, at the **Codes and Setup**, under **System Codes** select **Global Codes.** The sixth tab is **Phone Types**.



Field Descriptions

Phone Type

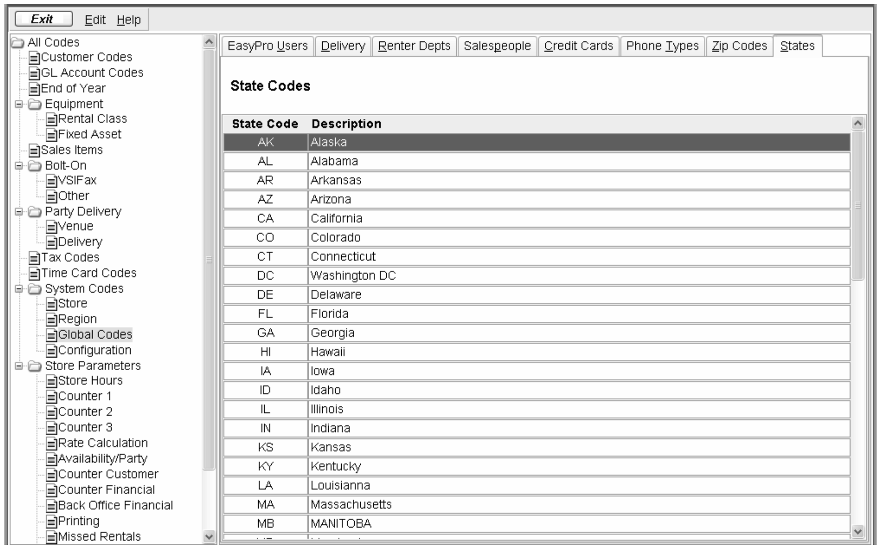
Enter the code for this type of phone number. (Common codes include **H** for home, **W** for work, **C** for cell phone, etc.) (This field has a one character limit.)

Description

Enter the description for this phone type.

State Codes

To edit **State Codes**, in **Codes and Setup**, under **System Codes** select **Global Codes.** The seventh tab is **State Codes**.



Field Descriptions

State Code

Enter the post office abbreviation you want the system to use for this state, using all capitals. (This field has a two character limit.)

Description

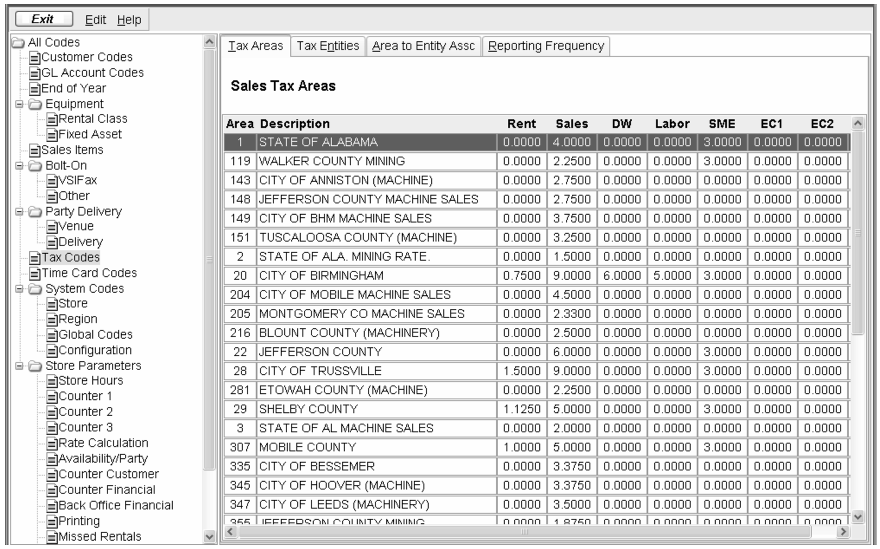
Enter the full name of the state.

Tax Areas

IMPORTANT: If your **Tax Code screen** contains more options than are listed below, your store has purchased the **Sales Tax** module (an advanced module sold separately). Refer to the **Sales Tax Manual** for details on setting up sales tax (not the instructions below).

Use this code file to set up sales Tax Areas that will be selected when adding customers and when collecting sales tax at the counter.

To edit **Tax Areas**, in **Codes and Setup Menu**, select **Tax Codes**.



Field Descriptions

Area

This is the code the system will use to identify the Tax Area. This may be a numerical code or an abbreviation of the area name. This Tax Area will be entered in each customer's file to determine the correct tax to apply to the customer's transactions. Alternate Tax Areas can also be selected when collecting payment at the counter.

NOTE: A default Tax Area is entered in page six of **Store Parameters** that is used for all cash transactions, unless overridden at the counter.

Description

Enter the full name of the tax area.

Rent Rate

Enter the tax rate charged on rental for this area.

Sale Rate

Enter the tax rate charged for sales items for this area (sales tax).

DW Rate

Enter the tax rate charged on damage waivers.

Labor Rate

Enter the tax rate charged on labor.

Addl Rate

If this area charges any additional taxes, such as a small motorized equipment tax or town taxes, enter the rate charged here.

NOTE: The label (or name) displayed for additional tax is set up on page 6 of **Store Parameters.**

EC1and EC2

Enter the environmental charges for the tax area (if required). Refer to the Counter manual for additional information concerning Environmental Charges. Field labels for the environmental charges can by customized on page 6 of **Store Parameters**.

GL Accounts Codes

Contents

General Ledger Accounts

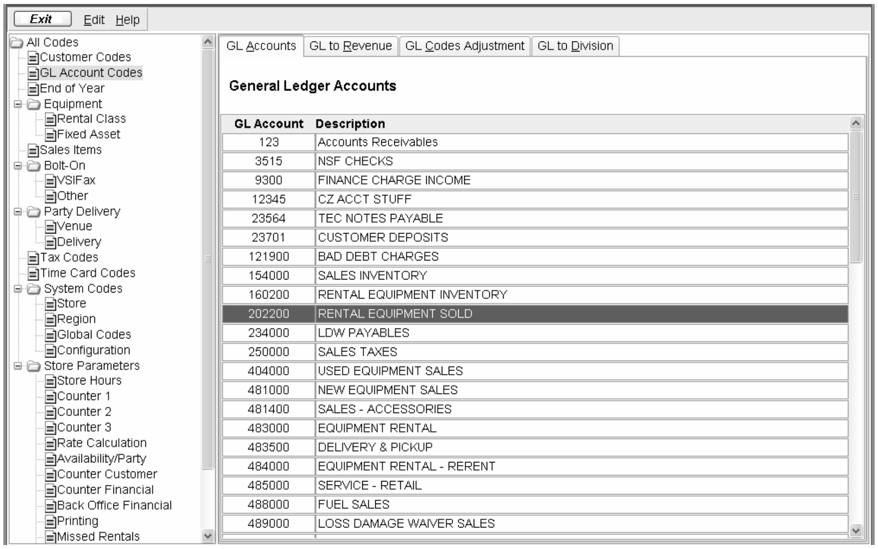
General Ledger accounts must be set up on your Alert EasyPro system so that financial information can be either exported or manually posted to third party General Ledger accounting packages.

NOTE: Multi-store locations should consult the section below entitled "Special instructions for multi-store sites".

The **General Ledger Accounts** file is used to enter a subset of your Chart of Accounts. Only those accounts which are needed to report Alert EasyPro financial activity need to be set up in this file. GL accounts should be set up for cash, refunds, deposits, accounts receivable, all income accounts, all cost of goods accounts, and any expense accounts used for cash drawer paid outs at the counter.

INITIAL SETUP: Alert EasyPro is delivered with several GL accounts set up for you. You should review the GL accounts with your installer and make any changes before going "live" with your Alert EasyPro system.

To edit **General Ledger Accounts**, in **Codes and Setup**, select **GL Account Codes** the first tab is **GL Accounts**.



Field Descriptions

GL Account

Enter the GL account number.

Description

Enter a description for the GL account.

Special instructions for multi-store sites

All Income, Cost of Goods, and Expense Accounts must have a 01, 02, etc. for each account as well as one for each account that ends in 00. For example, if your Rental Income account is 401000, you should also set up an account 401001 (for store 1), 401002 (for store 2), etc.

TIP: Consult with Alert staff to ensure the proper setup of General Ledger accounts.

NOTE: Review the section on “Counter GL Interface Parameters” before setting up your GL Accounts.

GL Account <-> Revenue Source Association

NOTE: This option can be accessed by Alert staff if any changes are necessary; however, usually this file is set up once and never changed. The explanation of this file is provided for informational purposes only. If you feel you need to make changes to this file, contact Alert for assistance.

This file allows Alert EasyPro to create many of the daily debits and credits for the allocation file. The following codes are entered with the proper General Ledger account numbers when your system is set up. No codes can be added to this list.

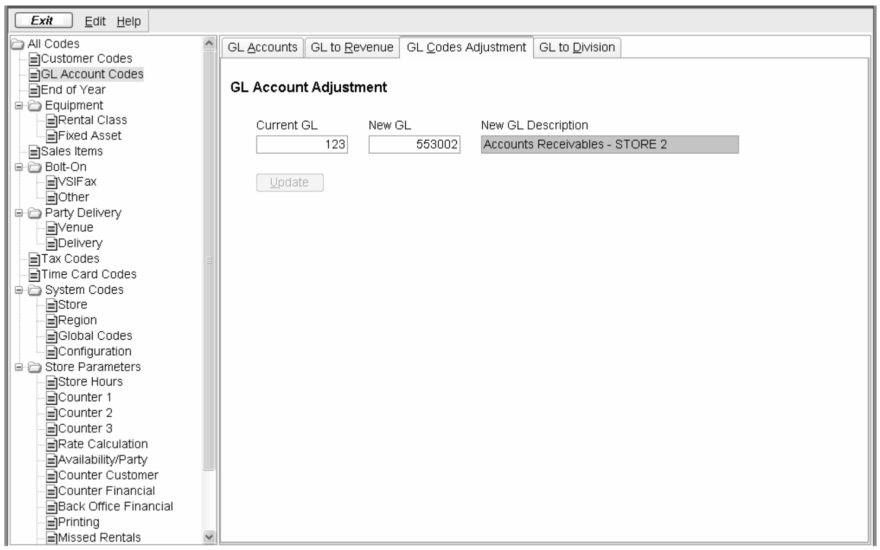
Code	Account #	Description
AR		Accounts Receivable
CA		Cash Account (debited by daily bank deposits from the counter)
DE		Customer Deposit Liability Account
DW		Damage Waiver Income Account
E1		Environmental Charge 1
E2		Environmental Charge 2
EX		Internal Repair Expense (generated from the **Work Order System**, an Advanced module sold separately)
LB		Labor (generated from the **Work Order System**, an Advanced module sold separately)
RO		Cash Account (debited by daily bank deposits from AR/ROA)
SM		Special Rental Tax (optional)
ST		Sales Tax Liability Account

GL Account Codes Adjustment

This program allows you to fix improper allocations to a "bad" GL account. For instance, if your sales tax account is 2350, but monies were improperly allocated to a "bad" account 2360, you can use this program to move the allocations that were inadvertently entered into account 2360 into account 2350.

CAUTION: Use this feature with extreme caution! We suggest you contact a Help Desk representative before attempting to fix a General Ledger problem with this program!

To access **GL Account Codes Adjustment**, in **Codes and Setup**, select **GL Account Codes.** The third tab is **GL Codes Adjustment**.



Field Descriptions

Current GL

Enter the current GL account number you want to change.

New GL

Enter the new GL account number.

New GL Description

Enter a description for the new GL account number. Then click Update to make the change. Click OK to confirm.

GL -> Division Table Association

Some third party accounting packages allow you to use letters as well as numbers in their Chart of Accounts. Since Alert EasyPro does not allow letters in GL account numbers, you can use this program to automatically "insert" the correct characters so that Alert EasyPro financial information can be read by these third party packages.

NOTE: Alert EasyPro users should not attempt to set up this program without assistance from the Help Desk.

Equipment Codes

Contents

Rental Groups

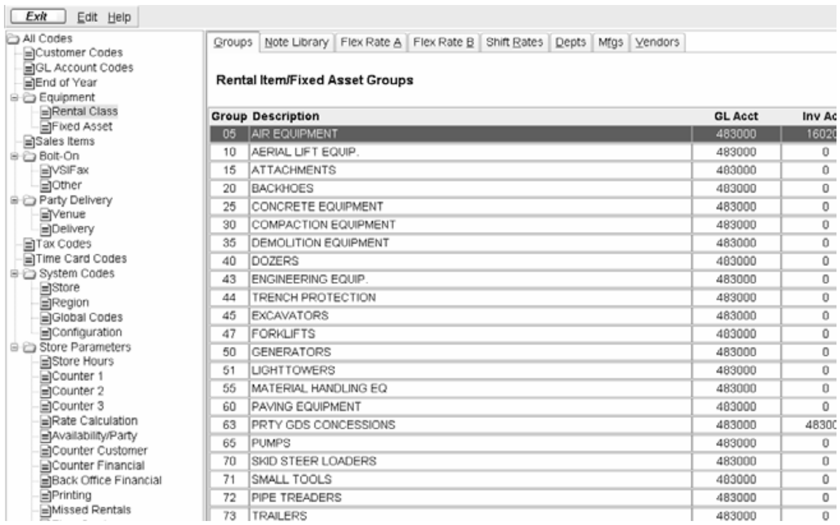
Rental Groups are used to classify your rental inventory into meaningful sub-categories using a two character alpha-numeric group number. For example, your equipment might be broken down into rental groups as follows (not a complete list):

Group	Description
01	Automotive Tools
02	Blades
CH	China
CO	Convention and Meeting

INITIAL SETUP: An Alert staff member has probably already discussed Rental Groups with you and helped you to define a strategy for assigning Rental Groups. We have provided sample Rental Groups for you in Appendix A. See also Appendix B and C for examples of how Rental Groups are set up to correspond with Rental Class and Fixed Asset numbering/lettering systems.

INITIAL SETUP: Carefully consider how you will classify your rental inventory using Rental Groups codes! Once you begin entering rental items in Alert EasyPro, you will assign each item to a rental group. If you decide to alter your Rental Groups later on, you will have to re-enter the Rental Group code for every item on your system.

To edit **Rental Groups**, in **Codes and Setup**, under Equipment, select **Rental Class.** The first tab is **Rental Groups**.



Field Descriptions

Group

Enter a two character code for this rental group.

Description

Enter the name of this rental group.

GL Account

Enter the number of the General Ledger account (from your GL Account codes) to which income from this category will be accumulated. You can also click on **Help** to see a list of available General Ledger accounts.

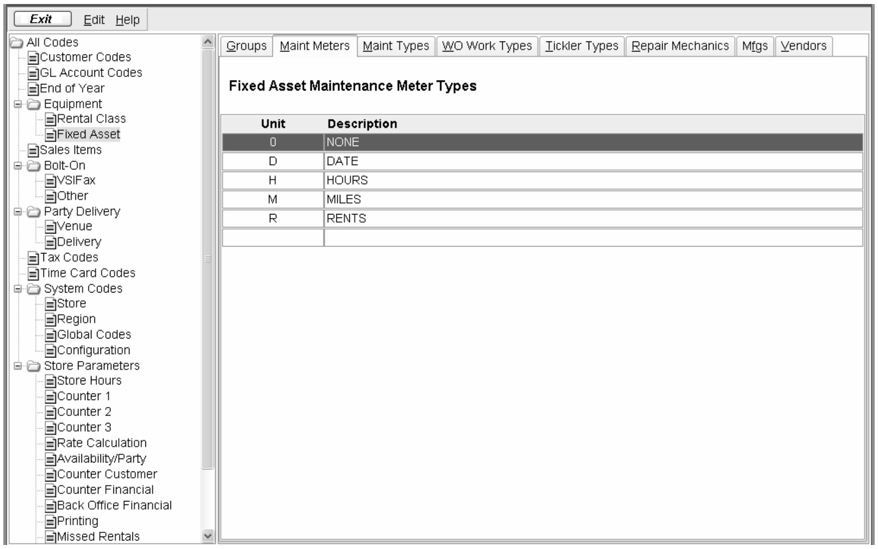
Pr

Enter a priority code (0-99) for the rental group. This priority code is used to sort the rental items on the **Expanded Truck Report** (this report is a feature of Party Affinity and is not included baseline Alert EasyPro. This field has no impact on your system unless you have Party Affinity).

Fixed Asset Maintenance Meter Types

Maintenance meters keep track of how often a piece of equipment needs to be serviced. Maintenance meter type codes are entered in the Maint Unit field in the Fixed Asset file. Baseline Alert EasyPro data comes with maintenance meter types pre-defined. Please review them and modify as needed.

To edit **Fixed Asset Maint. Meter Types**, in **Codes and Setup**, under **Equipment,** select **Fixed Asset**, then the **Maint. Meter tab.**



Field Descriptions

Maintenance Unit

Enter a one character code for the meter type that will be used to track maintenance requirements.

Description

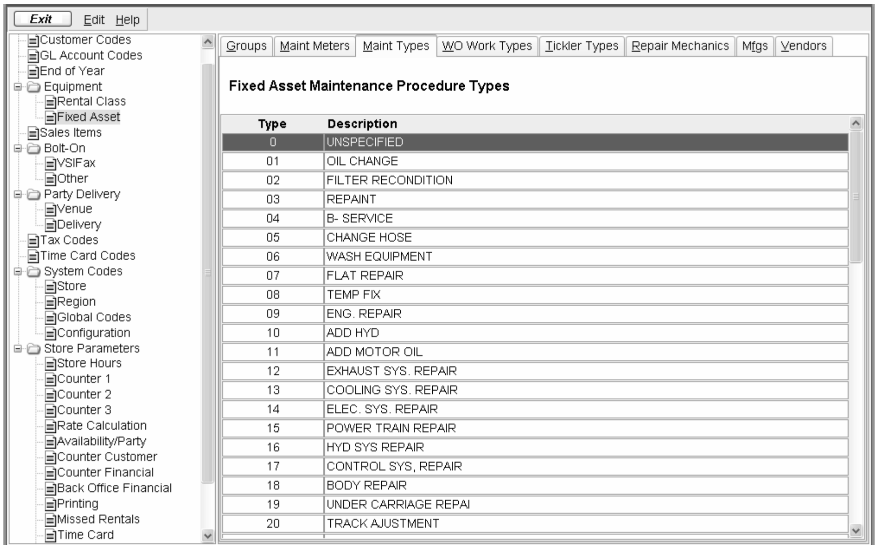
Enter the full name of this meter. Examples of maintenance meters include hours, miles, rents, etc.

Maintenance Procedure Types

This file holds codes for the various types of service work done on your rental equipment, such as oil change, safety check, etc.

You can record maintenance work performed on a piece of equipment using the **Maintenance Menu** option on the **Edit** menu in Fixed Asset File Maintenance.

To edit **Maintenance Procedure Types**, in **Codes and Setup**, under **Equipment** select **Fixed Asset.** Then click the **Maint. Types** tab**.**



Field Descriptions

Procedure Type

Enter a two character code for the maintenance procedure type.

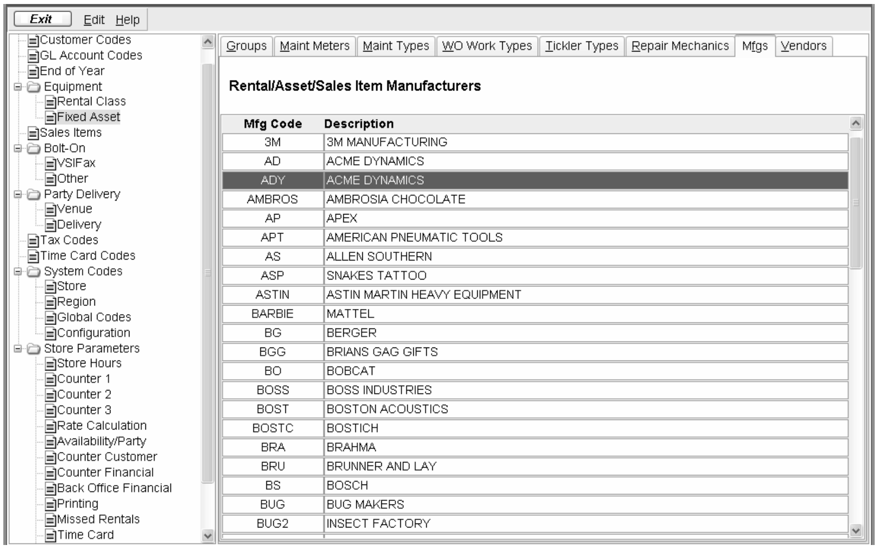
Description

Enter the type of maintenance work for this code.

Manufacturer Codes

Manufacturer Codes are entered into this file so you can denote the manufacturer for each rental and sales item in your system.

To edit **Maintenance Procedure Types**, in **Codes and Setup**, under **Equipment** select **Rental Class.** Then click the **Mfgs** tab**.**



Field Descriptions

Manufacturer Code

Enter a two character code for this manufacturer.

Description

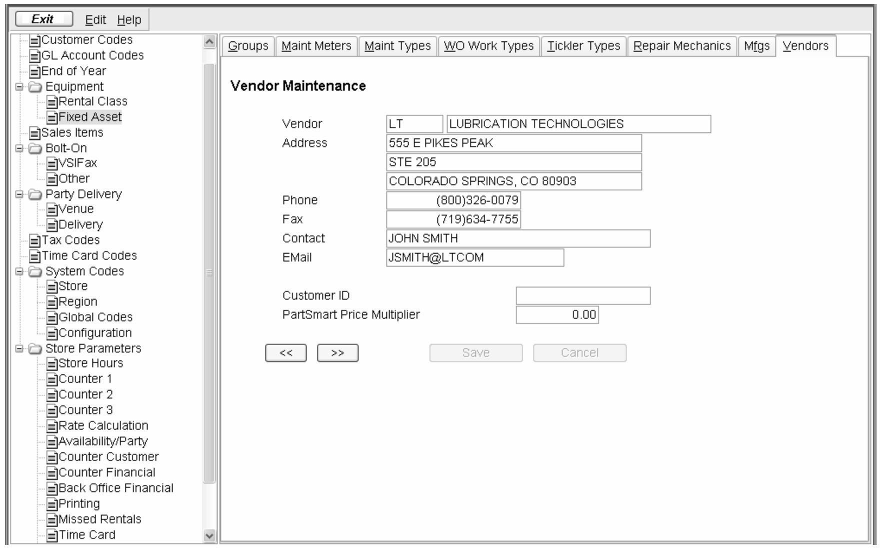
Enter the name of this manufacturer.

Note: Any vendor change here will also change the vendor list under Fixed Assets, and Sales Categories.

Vendor Codes

Vendor Codes are entered into this file so you can denote the vendor for each rental and sales item in your system.

To edit **Maintenance Procedure Types**, in **Codes and Setup**, under **Equipment** select **Rental Class.** Then click **Vendors.**



Field Descriptions

Vendor #

Enter a six character code for this vendor.

Description

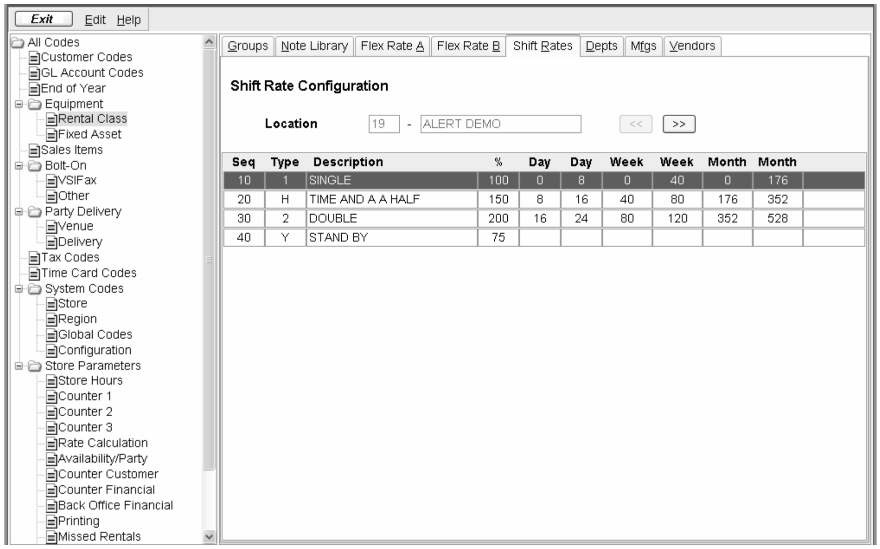
Enter the name of this vendor.

Note: Any vendor change here will also change the vendor list under Fixed Assets, and Sales Categories.

Shift Rates

The purpose of Shift Rates is to allow for an additional charge to be assessed for metered usage above the standard eight hours per day. The Shift Rates menu option in Codes and Setup is where the usage “bands” are defined. The usage bands apply a multiplying factor to the standard rate according to the metered usage.

To edit **Shift Rates**, in **Codes and Setup**, under **Equipment,** select **Rental Class**. Then select the **Shift Rates** tab**.**



Field Descriptions

Seq

The sequence number defines the listing order on the screen.

Type

The **Type** is a single character that describes the shift rate band. The allowed type codes are **1**, **H**, **2** and **Y**.

Description

This field describes the shift rate band being defined.

% of Single Shift

The single shift rate is equal to the regular rate of a rental item. This field indicates the multiplying factor to apply to the regular rate if more then the allowable meter units are used. For example, the **% of Single Shift** for **Time and a Half** is 150. This means that the rental rate charged for excess meter units will be 150% of the regular rate.

From and To

The **From** and **To** columns provide the parameters in which the shift rate will apply. The **Day**, **Week**, and **Month** row should contain the minimum (from) and maximum (to) allowable meter units for each shift rate band defined. For example, the **Single Shift** rate for 1 day applies for 0-8 metered units used. If more then 8 units and less then 16 units are used, then the **Time and a Half** shift rate applies.

Setting up Rental items for Shift Rates

Rental items that will use shift rates need to be flagged in Rental File Maintenance. Pull up the rental item in **Rental File Maintenance** and change field 8, **Shift Rate**, to **Y**. The rental item must be a metered item otherwise you will not be able to access this field.

Shift Rates at the Counter

When a rental item that uses shift rates is added at the counter, the user can select the appropriate shift rate from the drop-down list. If the regular rate is selected, then the single shift rate will be applied.

At check-in, the shift rate can be raised or lowered based on the meter usage entered if the usage falls outside of the original shift rate band. For example, a generator is rented for one day with 8 allowable meter units (hours). At check-in it is determined that the generator was used for 10 hours. The original shift rate was single, but after check-in the shift rate was changed to time and a half, of 150% of the regular rate.

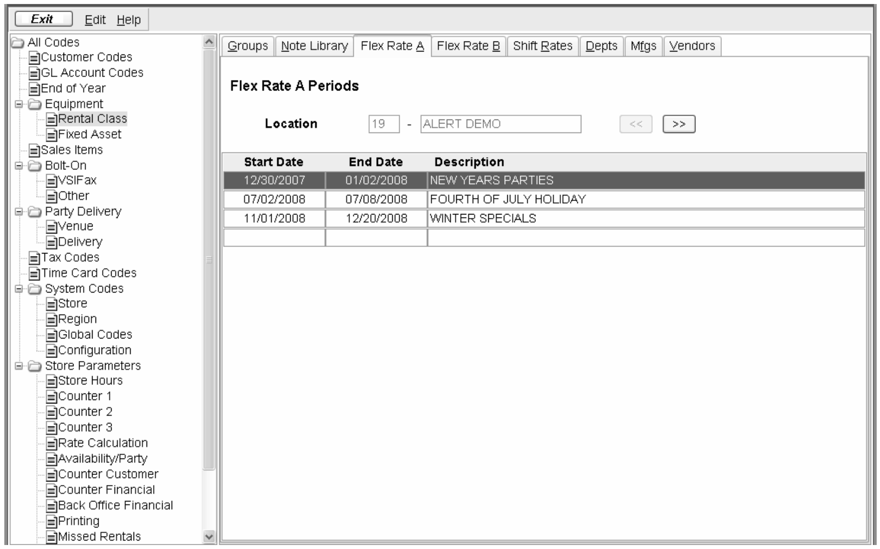
Flex Rate Table Setup

Flex rates provide you with the ability to adjust your rental rates (based on the rental class) according to a date range (Flex Table A) or according to days of the week (Flex Table B). The rate change will happen automatically once you have set up the appropriate flex rate table, specified flex rates in Store Parameters, and added a flex rate structure to the rental class rate tables. This section will cover the two flex rate tables found on the Rental/Sales Codes menu. The File Maintenance Manual covers how to add rate structures to accompany your flex rate table.

To edit **Flex Rate Table Setup**, in **Codes and Setup**, under **Equipment**, select **Rental Class**. Then click **Flex Rate A.**

Flex Rate Table A

There are two types of flex rate tables that can be defined. **Flex Rate Table A** is based on a date range. This is used when you want to apply discounted or increased rates based on demand during certain times of the year.



Field Descriptions

Location

This field shows the store location for which you are creating a flex rate table. To see a flex table for a different store, click the left or right arrows to the right of the listed location.

Start Date

Enter the day of the year you want the flex rate to start on in **MMDDYYYY** format.

End Date

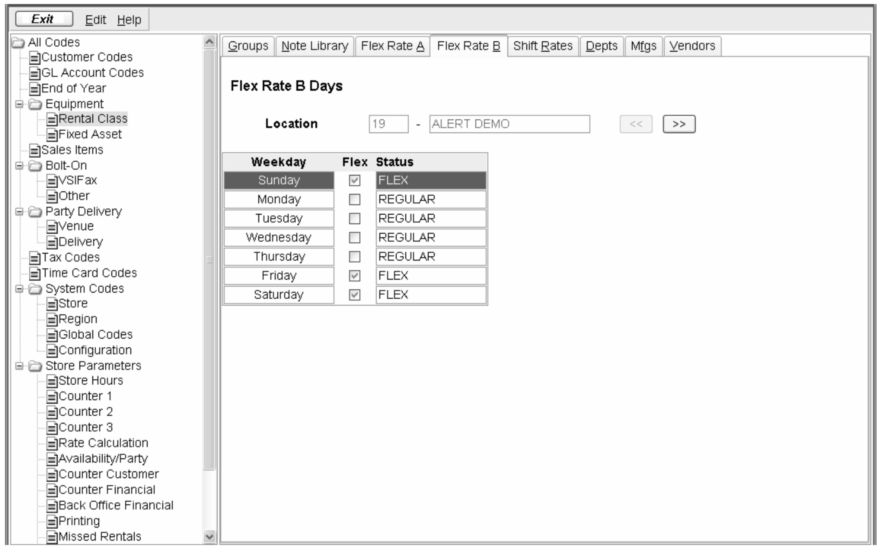
Enter the day of the year you want the flex rate to end on.

Description

Enter the description for the Flex Rate date range.

Flex Rate Table B

Flex Rate Type B is based on the day of the week. This is used when you want to apply discounted or increased rates for specific days of the week. This type of flex rate is useful in attempting to encourage or discourage demand for items during the week or on weekends.



Field Descriptions

Location

This field shows the store location for which you are creating a flex rate table. To see a flex table for a different store, click on the right and left arrows located to the right of the located listed.

Day of the Week

The days of the week are listed in this column.

Flex Status

This is a two field column. The first field can be edited to have either an R (regular rate) or an F (flex rate). The second column will reflect the description of your selection.

Sales Item Codes

Contents

Sales Item Categories

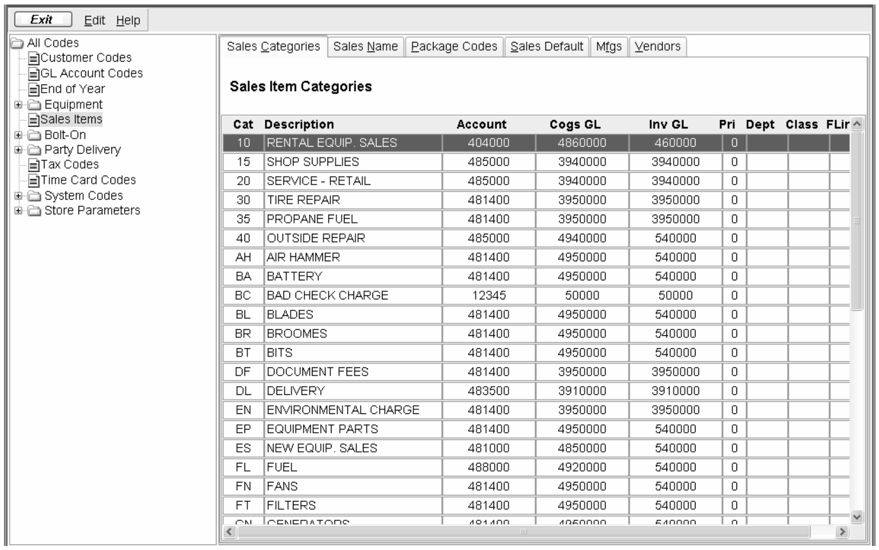
Like rental groups, Alert EasyPro allows you to classify sales items according to categories (see Rental Groups for examples of numbering). The sales category is a two character field that is alpha-numeric.

There are a few sales categories that Alert recommends you have setup. These include, but are not limited to New Equipment Sold, Rental Equipment Sold, Delivery Income, etc. Discuss these sales categories with your assigned Alert installer to determine which ones meet your business needs.

INITIAL SETUP: An Alert staff member has probably already discussed Sales Groups with you and helped you to define a strategy for assigning Sales Groups.

INITIAL SETUP: Carefully consider how you will classify your sales inventory using Sales Groups codes! Once you begin entering sales items in Alert EasyPro, you will assign each item to a sales group. If you decide to alter your Sales Groups later on, you will have to re-enter the Sales Group code for every item on your system – a long and tedious exercise!

To edit **Sales Item Categories**, in **Codes and Setup**, select **Sales Items**, then click the **Sales Categories** tab.



Field Descriptions

Category

Enter a two character code for this sales category.

Description

Enter the name of this sales category.

Sales Income Account

Enter the General Ledger account number to which this category will be associated. Click **Help** to view a list of available General Ledger accounts.

Cogs GL

Enter the General Ledger account number associated with cost of goods sold for the sale of an item in this category. Click **Help** to view a list of available General Ledger accounts.

Inv GL

Enter the General Ledger account number associated with the Inventory Asset account to be reduced each time an item from this category is sold. Click **Help** to view a list of available General Ledger accounts.

NOTE: If you immediately code items purchased for resale to cost of goods sold, use your Income Account GL account number for all three columns above.

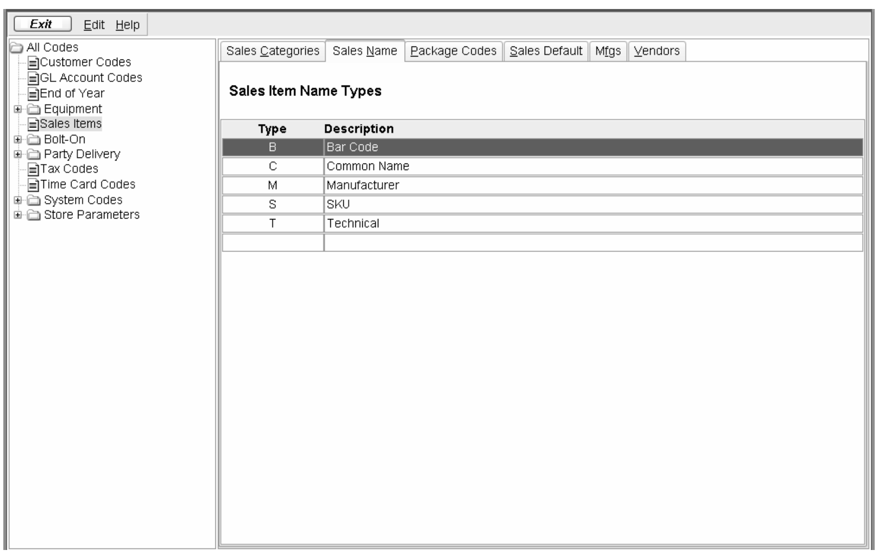
Pr

Enter a priority code (0-99) for the sales category. This priority code is used to sort the sales items on the **Expanded Truck Report** (this report is a feature of Party Affinity and is not included in baseline Alert EasyPro).

Sales Name

This file specifies the various name types that can be used when adding common names to the Sales file.

To edit **Sales Item Categories**, in **Codes and Setup**, select **Sales Items**, then click the **Sales Name** tab.



Field Descriptions

Type

This field lists the various type codes. You are not allowed to change this field.

Description

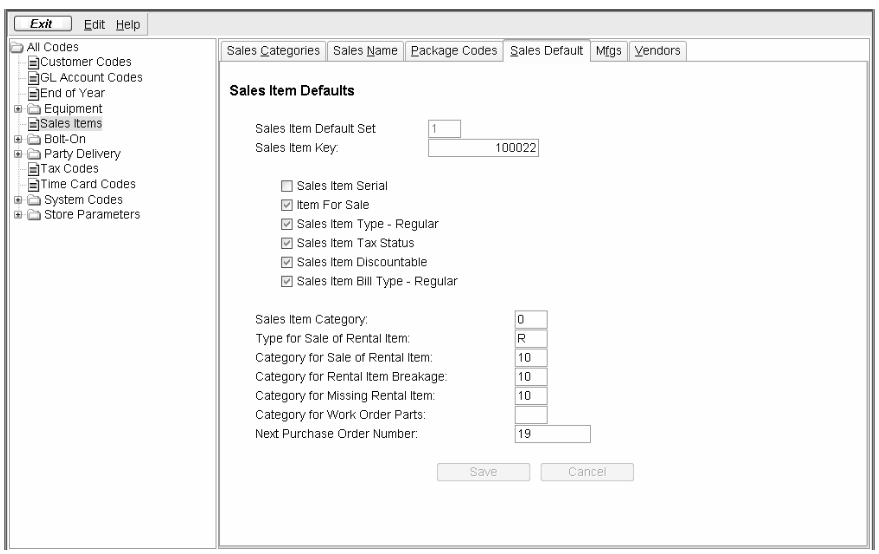
Enter a description for the type code listed. The descriptions can be changed for each name type.

Sales Default

This parameter file governs default settings for sales items that are added to the system from the counter "on the fly," as well as defaults when selling rental items using the Sale of Rental Item feature (or when rental items are sold because they were broken or lost). These defaults are used for items not maintained as part of your sales inventory.

NOTE: Adding sales items "on the fly" is explained in "Sales Screen Functions" in the Counter Manual. The Sale of Rental Item feature is explained in "Rental Screen Functions" in the Counter Manual.

To edit the **Sales Default**, in **Codes and Setup**, select **Sales Items**, then click the **Sales Default** tab.



Field Descriptions

Sales Item Default Set

NOTE: This field is set to **1** and should never be changed.

Sales Item Key

NOTE: This field holds the sales key for the next sales item added on the fly and is automatically updated by the system.

Sales Item Serial

Check this item if most sales items added on the fly will be serialized.

Item for Sale

This field holds the default setting for whether the item is for sale or not. (Sales items can be added to the system without making them available for sale through the counter.)

TIP: Since this parameter stores the default setting for this field when adding sales items at the counter, it should be marked.

Sales Item Type - Regular

Check the box if most sales items added at the counter should be set up as regular sales items. If most will be defined as an "other" sales item (usually reserved for delivery, cleaning charges, etc.), then leave the box unchecked.

TIP: Normally, this field should be set to checked, since "other" sales items are not usually added at the counter.

Sales Item Tax Status

If most items added at the counter are taxable, then check the box.

Sales Item Discountable

If most items added at the counter are discountable, then check the box.

Sales Item Bill Type - Regular

Check the box if most sales items added at the counter should be set up with a regular bill type. If most will be defined as Final sales items (i.e. fuel or other charges that need to be verified at the end of the rental term), then leave the box unchecked.

TIP: Normally, this field should checked, since Final sales items are not usually added at the counter.

Sales Item Category

Enter the default sales category to be used for sales items added at the counter.

Type for Sale of Rental Item

If most rental items sold using the Sale of Rental Item feature should be added to the sales files as regular sales items, enter **R**. If most will be defined as an "other" sales item (usually reserved for delivery, cleaning charges, etc.), enter **O**.

TIP: Normally, this field should be set to R, since rental items sold at the counter would rarely be classified as an "other" sales item.

NOTE: Selecting a sales category where indicated will also determine the GL account to which this sale is associated. You may want to create a special sales category for each of the following types of sale so they can be tracked separately in your General Ledger.

Category for Sale of Rental Item

Enter the default sales category to be used for rental items sold using the Sale of Rental Item feature.

Category for Rental Item Breakage

Enter the default sales category to be used for rental items sold using the Breakage feature.

Category for Missing Rental Item

Enter the default sales category to be used for rental items sold because they were lost by the customer.

Category for Work Order Parts

Enter the default sales category to be used for parts added for use with the Work Order system. (Work Order is an advanced module and may be purchased separately).

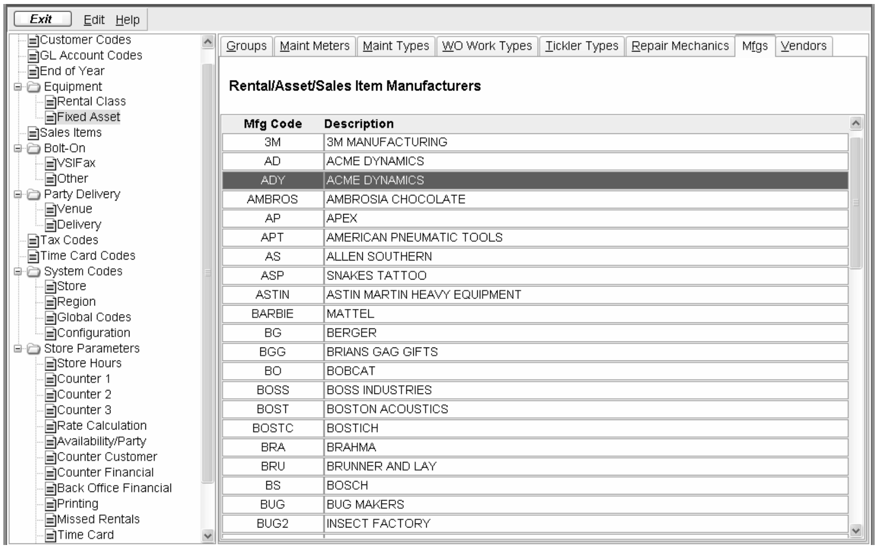
Next Purchase Order Number

This field is only used with the Purchase Order module. If you are using the Purchase Order module, then enter your starting purchase order number here. The Alert system will then automatically update this field and use it to determine the next purchase order number.

Manufacturer Codes

Manufacturer Codes are entered into this file so you can denote the manufacturer for each rental and sales item in your system.

To edit **Maintenance Procedure Types**, in **Codes and Setup**, select **Sales Items.** Then click the **Mfgs** tab**.**



Field Descriptions

Manufacturer Code

Enter a two character code for this manufacturer.

Description

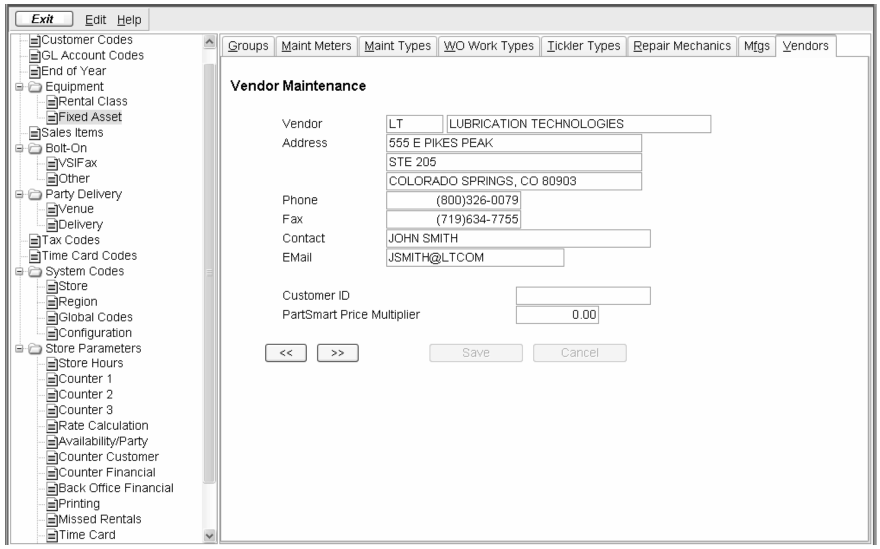
Enter the name of this manufacturer.

Note: Any vendor change here will also change the vendor list under Fixed Assets, and Rental Class.

Vendor Codes

Vendor Codes are entered into this file so you can denote the vendor for each rental and sales item in your system.

To edit **Maintenance Procedure Types**, in **Codes and Setup**, select **Rental Class.** Then click **Vendors.**



Field Descriptions

Vendor #

Enter a six character code for this vendor.

Description

Enter the name of this vendor.

Note: Any vendor change here will also change the vendor list under Fixed Assets, and Rental Class.

Sales Item Package Codes

Sales Item Package Codes are used to specify the types of packages your sales items are sold in. The codes setup here will be available for selection in Sales File Maintenance. The code file has a few default entries. More entries can be added, or edit the existing ones. See the File Maintenance Manual for additional details.

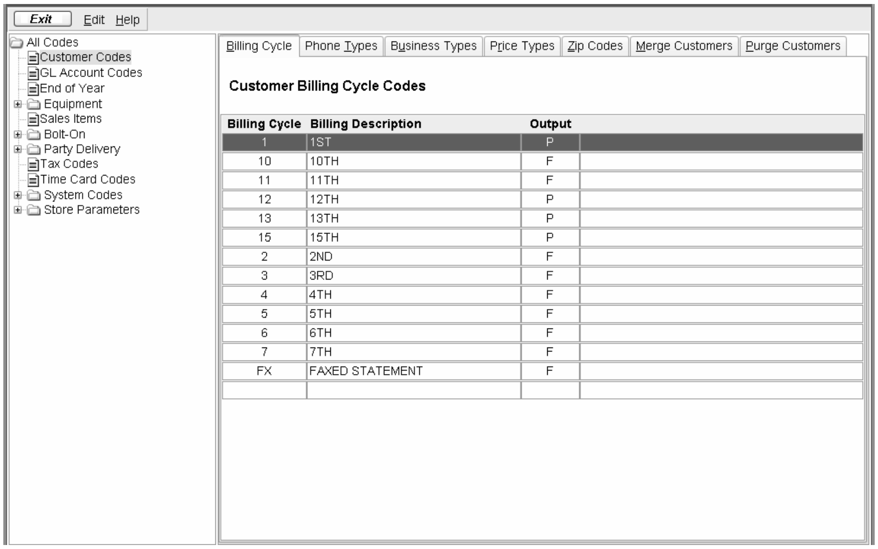
Customer Codes

Contents

Customer Billing Codes

Customer Billing Codes allow you to set up multiple billing cycles for customers. For instance, customers can be on a billing cycle that begins on the first of the month or on the 15th of every month.

To edit **Customer Billing Codes**, in **Codes and Setup** select **Customer Codes** then click the **Customer Billing Codes** tab.



Field Descriptions

Billing Cycle

Enter a two-digit billing cycle code.

Billing Description

Enter a description for this billing code.

Output

Enter **P** to output the statements to a printer, or **F** to output the statements to the fax line.

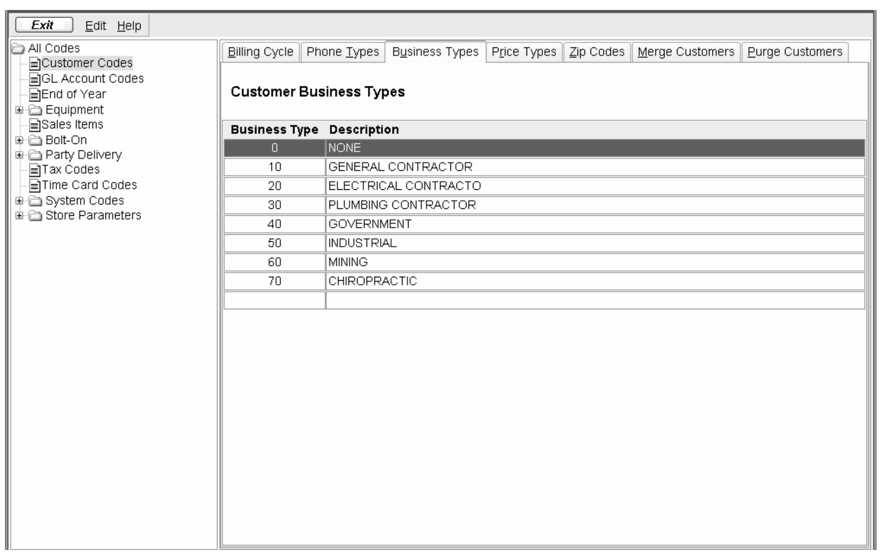
NOTE: The fax option is only valid if you have purchased and installed VSIFAX. If you do not have VSIFAX, then enter **P**.

Customer Business Types

This file holds Customer Business Types. Business Types are used to classify subsets of your customer base. This classification can then be used when printing reports.

For instance, if you want to send a flyer to all your contractor customers informing them of new equipment you have available of special interest to contractors, you can print **Customer Labels** (found on the **Marketing Menu**) by Business Type.

To edit **Customer Business Types**, in **Codes and Setup**, select **Customer Codes** then click the **Business Types** tab.



Field Descriptions

Business Type

Enter the code for this type of business. Alert recommends keeping the 0-None business type to keep your data accurate. (This field has a two character limit.)

Description

Enter the description for this business type.

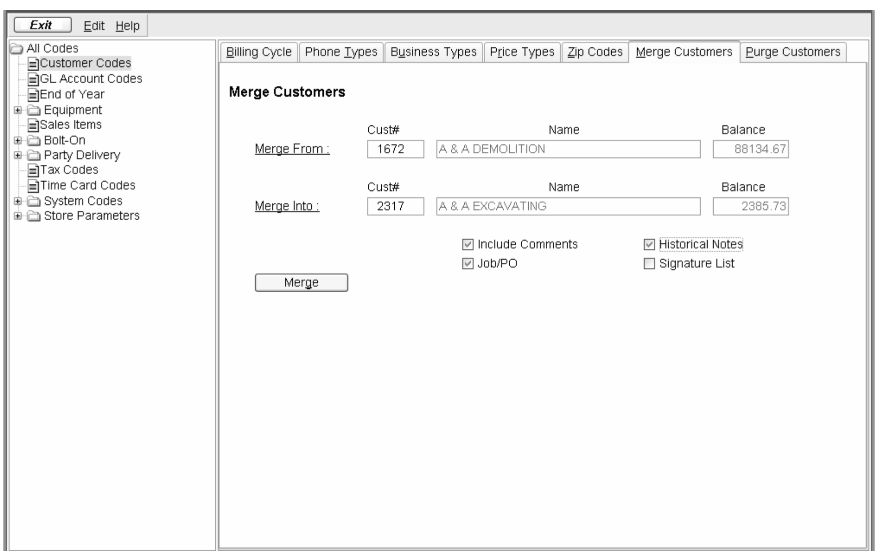
Customer Price Type Codes

NOTE: **Customer Price Type Codes** is only used by clients who have purchased the **Parts and Sales** module. See the **Parts and Sales Manual** for details.

Merge Two Customers

The Customer Account Merge option allows you to combine two customer accounts in Alert EasyPro. Account balances are combined and updated when the End of Day process runs.

You need the customer account numbers for the two accounts that you are going to merge (or use the drop-down arrow for a list of customers), and you need to decide what information you would like to have kept intact when the accounts are merged.



Field Descriptions

Cust #

Enter the account numbers of the customers you want to merge.

Name

The names of the selected customers will appear in these fields.

Balance

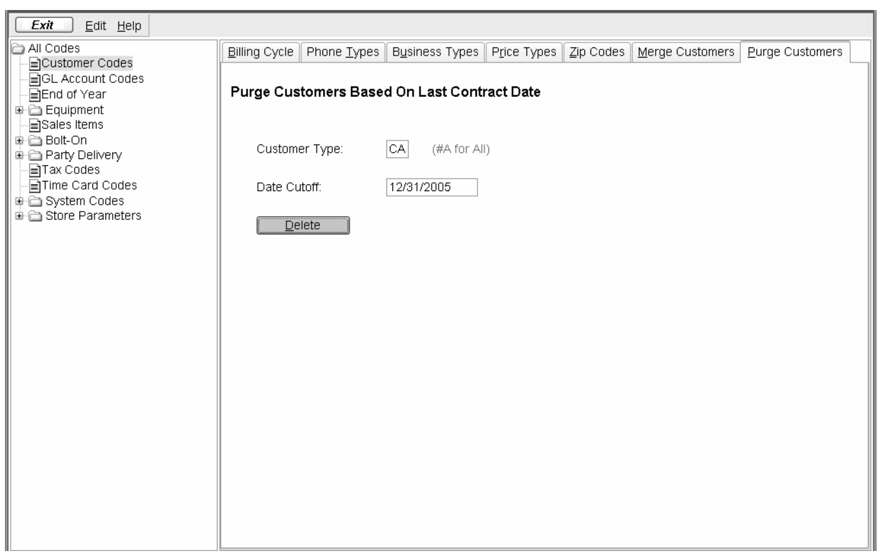
The current account balance will appear in this field for each customer selected.

NOTE: Prior to running the Customer Merge Program, the live data must be copied demo data using the operator login, an aging for all customers must be run, and a ledger card for the selected customers must be run.

Customer Account Purge

The Customer Account Purge feature allows you to purge customers from the Alert EasyPro system using two criteria: customer type and a cutoff date.

The last contract date for customers must be on or before the cutoff date. Customers will not be purged if there are any open invoices, unapplied payments, or open tickets for that customer.



Field Descriptions

Customer Type

Enter the two character code for the Customer Type that you would like to purge. If you would like the purge to apply to all customers, then type #A.

Cut Off Date

Enter the cut off date for the purge.

NOTE: Alert does not recommend that the customer type of “BG” be purged from your system.

Customer codes in System Wide Codes

NOTE: **Zip Codes**, and **Phone Type Codes**, are described in the chapter **System Wide Codes**.

Default Sets, Credit Warning Parameters and Advanced Setup

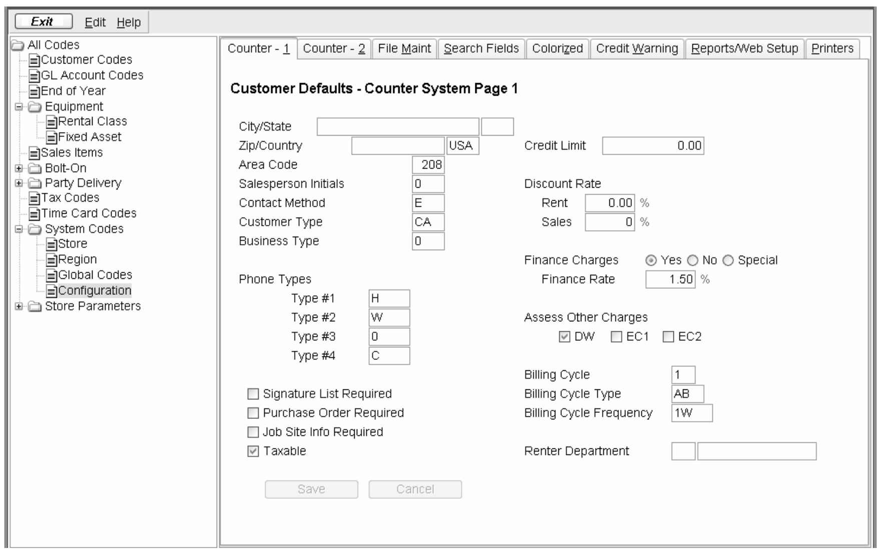
Contents

Customer Defaults at the Counter System

Default Sets allows you to set up default values for fields of information you need to fill in when adding a customer. When a customer is added, the values entered in this screen will be entered as the default value for the corresponding field. (Of course, an alternate value can always be entered into the field.)

This section applies to default values that will be used when adding a customer at the counter.

To set up **Customer Defaults** for the Counter System, in **Codes and Setup**, under **System Codes**, select **Configuration**. The **Counter-1** tab is where the Customer Defaults are defined.



Field Descriptions

City/State

Enter the default city and state that should be used when adding customers at the counter.

Zip Code/Country

Enter the default zip code and country.

Area Code

Enter the default phone area code.

Salesperson Initials

If you track revenue by salesperson, you can default a salesperson's code here. If you don't track revenue by salesperson, enter **0** (zero).

Contact Method

Enter the default contact method – **E** for Email or **F** for Fax.

Customer Type

Enter a default Customer Type.

Business Type

Enter a default Business Type. This should be the Business Type most used to classify your customers when they are added at the counter. If you have a diverse customer base, you may want to enter **0** (zero) here to leave the default empty.

HINT: Since in many cases, more **CA** (cash) customers are entered at the counter vs. charge customers, you may want to enter **CA** as the default Customer Type here.

Phone Type 1-4

Enter a default phone types for each of the four phone fields. These may include Home, Cell, Work, Fax, etc.

Signature List Required

Check the box if most of the customers added at the counter will require a signature list.

Purchase Order Required

Check the box if most of the customers added at the counter will require a purchase order number.

Job Site Info Required

Check the box if most of the customers added at the counter will require that a job site be indicated on rental tickets.

Taxable

Check the box if most of the customers added at the counter will be taxed.

Credit Limit

Enter the default credit limit for new accounts entered at the counter.

Discount Rate (Rent and Sales)

Enter the default discount rate for new accounts added at the counter for rental and sales items. If no discount should be given, enter **0** (zero).

Assess Finance Charges

If most customers added at the counter will be assessed finance charges, then select Yes. Otherwise select No or Special.

Finance Rate

Enter the normal rate at which finance charges are applied.

Assess Other Charges (DW, EC1 and EC2)

If most of the customers added at the counter will be charged damage waiver and/or an environmental charge(s), then place a check mark in the appropriate box (by clicking in the box). Leave the any of the boxes blank if the charges are not usually assessed.

Billing Cycle

Enter the default billing cycle (as entered in Customer Billing Codes in Customer Codes) to use when adding customers at the counter.

Billing Cycle Type

Select the usual billing cycle type, Advanced Bill or Renewal Bill.

Cycle Billing

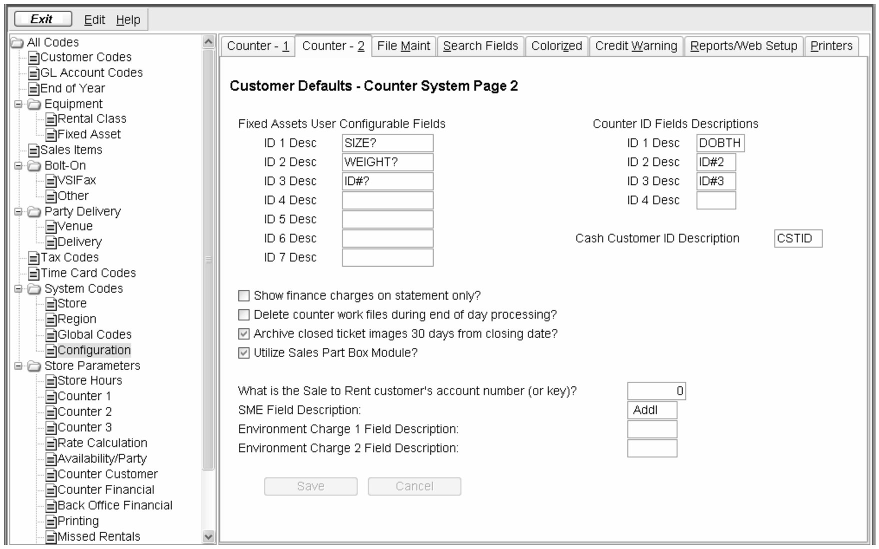
Enter in the default cycle billing type for customers added at the counter, then the default billing frequency.

Renter Department

Select the default Renter Department. You may want to select a null option (such as None) to avoid having customers incorrectly classified.

Customer Defaults at the Counter System – page 2

The Counter-2 page lists additional defaults that apply to customers added in the Counter System.



Field Descriptions

Fixed Assets User Configurable Fields

Seven user configurable fields have been added to the Fixed Asset master record. Use the space available to indicate the field labels. In Fixed Asset File Maintenance, the first four fields have a 20 character limit; the next three have a 15 character limit. These fields are for information only and are not used on any current Alert reports but you can use them to customize your own reports using the Report Writer.

Show Finance Charges on Statement Only

Place a check in the box if you want finance charges to accrue, but not be charged to the customer until they have been paid. This prevents you from having to credit the charges back off the account should the customer refuse to pay the charges.

Delete counter work files during end of day processing?

Place a check mark in the box if you want the work files deleted during end of day processing. This option should not be selected unless your site is having trouble with tickets stranding. Please consult with an Alert Help Desk technician before checking this option.

Archive closed ticket images 30 days from closing date?

Place a check in the box if you want closed ticket images to be archived after 30 days. Images that are not archived will be purged from the system after 30 days.

Utilize Sales Part/Box Module?

Place a check in the box if you want to use the Sales Part/Box module. This module is described in detail in the File Maintenance Manual.

SME Field Description

If your store charges additional taxes on rentals, you may enter a description for this tax here. For example, if you charge SME tax, enter **SME**; or, if you charge a town tax, enter **City**. This description is limited to 4 characters.

Environment Charge 1 Field Description

Enter a description for the first environmental charge. The description is limited to 5 characters (alpa-numeric).

Environment Charge 2 Field Description

Enter a description for the second environmental charge. The description is limited to 5 characters (alpha-numeric).

ID 1 Description

Enter the first type of customer identification. This description is limited to five characters, and the form of ID must be a date format. (Most use this field for date of birth, and enter **DOBth** in this field.)

ID 2 Description

Enter the type of identification that will be used as the second form of ID. Your description of this ID is limited to five characters. (The second form of ID is limited to 11 characters, so a social security number is an ideal form of ID for this field. Many enter **SSN** to denote this field for entering social security numbers.)

ID 3 Description

Enter the type of identification that will be used as the third form of ID. The third form of ID is limited to 10 characters.

ID 4 Description

Enter the type of identification that will be used as the fourth form of ID. The fourth form of ID is limited to 11 characters.

Cash Customer ID Description

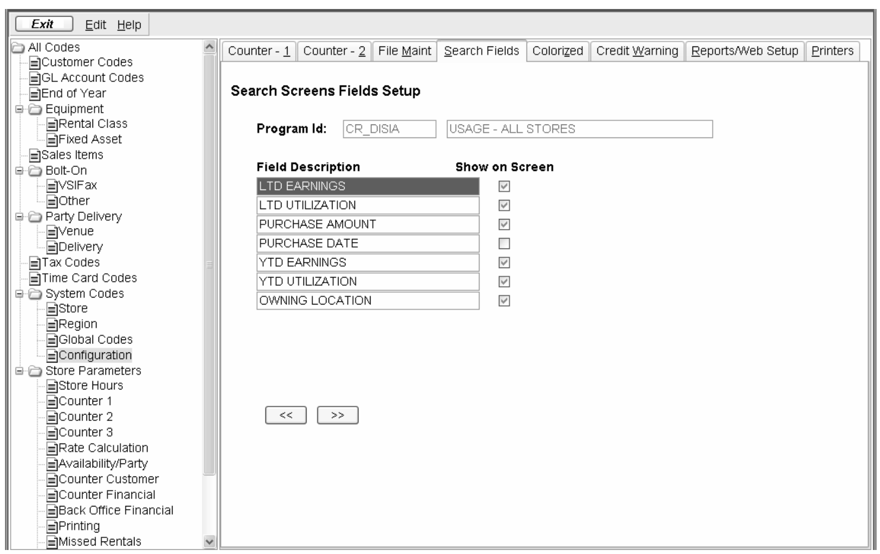
Enter the type of identification that will be used for cash customers. This type of ID is limited to 20 characters and is usually the customer's drivers license. Your description of this ID is limited to 5 characters. (Most users enter **Driv#** in this field.)

Customer Defaults in File Maintenance

This section applies to default values that will be used when adding a customer through **File Maintenance**. Under Configuration, select the **File Maint** tab. Screen and field descriptions are the same those listed under **Customer Defaults at the Counter**.

Search Fields

Search Screens Fields Setup allows you to specify which columns of information will be displayed with searching for Fixed Assets. Place a check next to the information you want to have displayed. Use the left and right arrow keys under all the fields to scroll through the various Fixed Asset search screens.

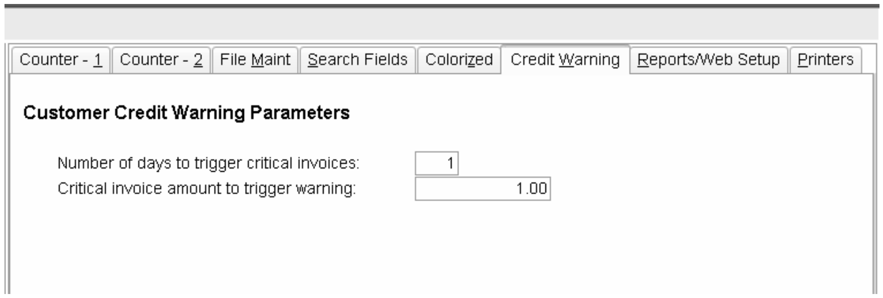


Credit Warning parameters

Credit Warning parameters define when a customer's credit information will display at the counter. The display is governed by two factors: number of days late and total amount due.

When a customer's credit activity meets both of the criteria set in this parameter file, a box appears on the counter screen when the customer's name is added to a ticket. The box shows payment, age, and volume analysis for the customer's account.

To set up **Credit Warning Parameters**, at the **Codes and Setup Menu**, select **Credit Warning Parameters**.



Field Descriptions

Number of days to trigger critical invoices

Enter the number of days an invoice can be overdue before it triggers a credit warning message. For instance, if 30 is entered here, any invoice over 30 days old will trigger the credit warning message at the counter.

NOTE: The invoice amount, plus any other invoices over 30 days old, must also exceed the value set in the "Critical invoice amount to trigger warning" parameter.

Critical invoice amount to trigger warning

Enter the dollar limit allowed before a credit warning is displayed at the counter. Continuing our example, if $1,000 is entered in this parameter, the credit warning will be triggered if the sum of all invoices over 30 days old exceeds $1,000.

NOTE: Since invoice history is updated during end of day, credit warnings do not include any business activity completed since the last end of day was run.

Reports/Web Setup

Reports/Web Setup parameters are located in Codes and Setup, under Configuration. Select the Reports/Web Setup tab to view the parameters. Changing these settings may affect the viewing of reports and tickets, saving of ticket image, and the ability for the system to retrieve pictures associated with rental items.

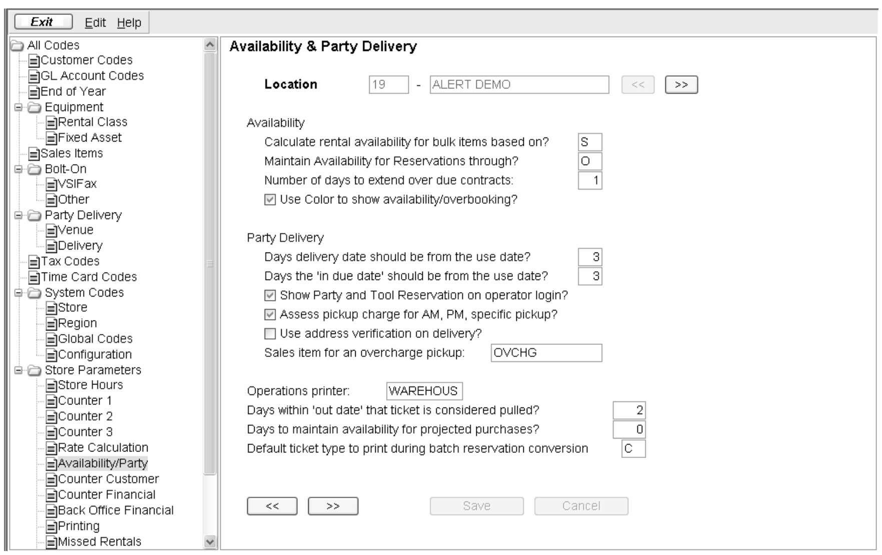
Region Setup Menu

The setup of regions allows the user to select if availability at the counter will be reported based or local, regional, or system wide. The user will also be able to set, at the store level, the default search scope for rental item search screens: local or regional.

NOTE: Be sure to have all of your stores added to the Alert system before beginning Region Setup.

Before beginning Region Setup, you will need to access Store Parameters for each store and set the bulk rental item availability calculation. This can be found in **Codes and Setup**, under **Store Parameters**. Select the **Availability/Party** option.

NOTE: Use the **Copy** button on the **Store Details** page under **Store Parameters** to copy store parameters and rental rates (optional) from an existing store to a new store. This new store will still need to be assigned to a region.



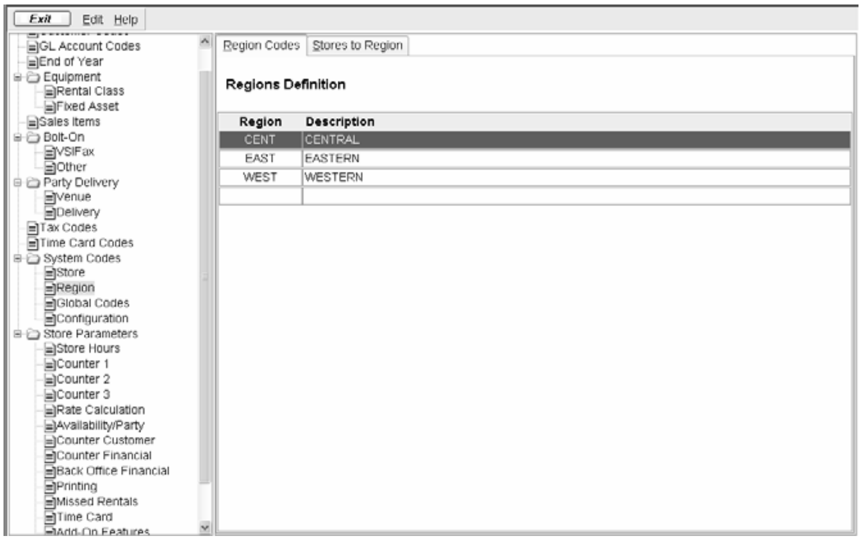
The first option needs to be changed to either S for system wide availability or L for local availability. See the table below for information on how the availability will be calculated.

Availability Flag	Tickets selected for quantity committed	Quantity selected for availability
(S) System	All open reservations and contracts that are impacted by the dates on the ticket	Fixed asset maintenance total quantity

(L) Local	All open reservations and contracts for the same location as the ticket being written that are impacted by the dates on the ticket	Fixed asset quantity for that bulk item at that location

Adding Region Codes

Once this has been completed, you can move onto the next step of creating regions. Regions can be added in **Codes and Setup**. Select **Region** under **System Codes**. The first tab is **Region Codes**. Click **F5Add** to begin adding regions.



Field Descriptions

Region

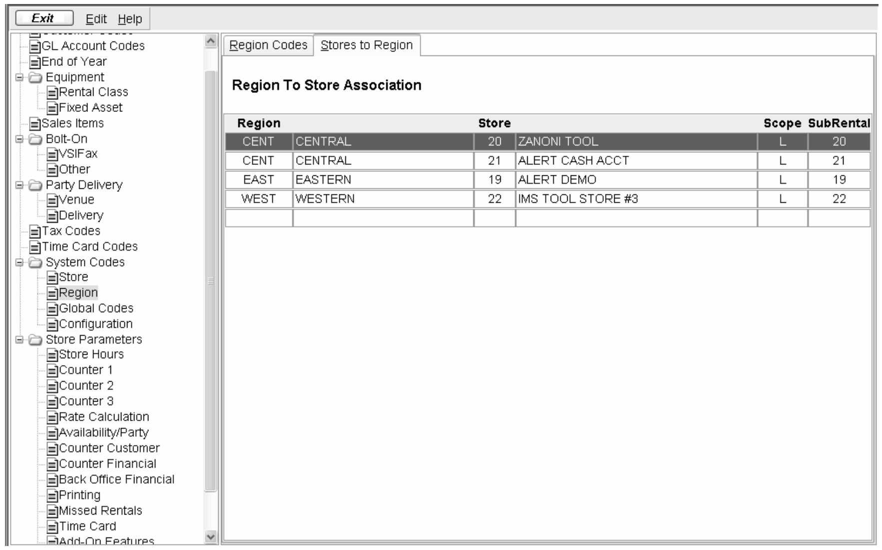
Enter a code for the region, up to 5 characters.

Description

Enter a description for the region code.

Associate Stores to Regions

The next step is to begin associating each store to a region. When associating stores to a region, the system can be set to have a default search scope at the counter rental item search screen. Click the **Stores to Region** tab.



Field Descriptions

Region

Select the code for the region you are going to associate a store to.

Store

Select the store number for the store you want to associate to the region selected.

Search Scope

Enter either L (local) or R (region). This sets the default search at the counter rental item search screen. If you select R, then the system will display all items for any store in the region. If you select L, then the system will display only equipment from that store. You will be able to toggle back and forth from a Region to Store search scope at the Counter.

NOTE: Selecting R will allow stores that do not carry their own inventory to easily see rental items from all stores in the region without having to reset the search area.

Setting up Environmental Charges

Environmental Charges are used to charge additional taxes or fees. There are two environmental charges, you can choose to use one or both. Before these charges can be used at the counter you need to complete the setup described below.

Setting up Environmental Charges:

1. In **Codes and Setup**, under **Store Parameters**, select **Counter Financial**. Enter in the Environmental fee percentage for one or both Environmental fees.
2. The field labels for the two environmental charges can be changed on the **Counter-2** tab in **Configuration** under **System Codes**.
3. If the environmental fee is subject to sales tax, then you will need to set up the rate of the sales tax charged in the **Sales Tax Table**. Access the Sales Tax Table (Select Tax Codes, then the Tax Area tab), and enter the applicable sales tax rate in the EC1 and EC2 columns.
4. Next you need to set up a **GL Account** for the environmental fee. Select **GL Account Codes** in **Codes and Setup** – then **GL Accounts**. Click **F5Add** to add GL account codes for one or both fees.
5. Once you have created a GL account for one or both environmental fees, you will need to adjust the **GL <-> Revenue Source Association**. Use your arrow keys to highlight E1 (Env fee 1) and/or E2 (Env fee 2). Then press **F6Chng** and input the corresponding GL Account code.
6. In order for the environmental fees to be charged, both the customer on the ticket and the rental item(s) must also be flagged to require the environmental fee(s).
    a. A customer can be flagged to require one or both environmental charges. Pull up the customer and click on the Contract tab on the bottom half of the screen.
    b. Fixed Assets can be flagged to require one or both environmental charges. Pull up the fixed asset and click on the Env Charge tab to change the settings.
7. It is recommended that you edit the **Customer Default Sets** under **Configuration** menu to require the Env 1 and 2 fees when a new customer is added.

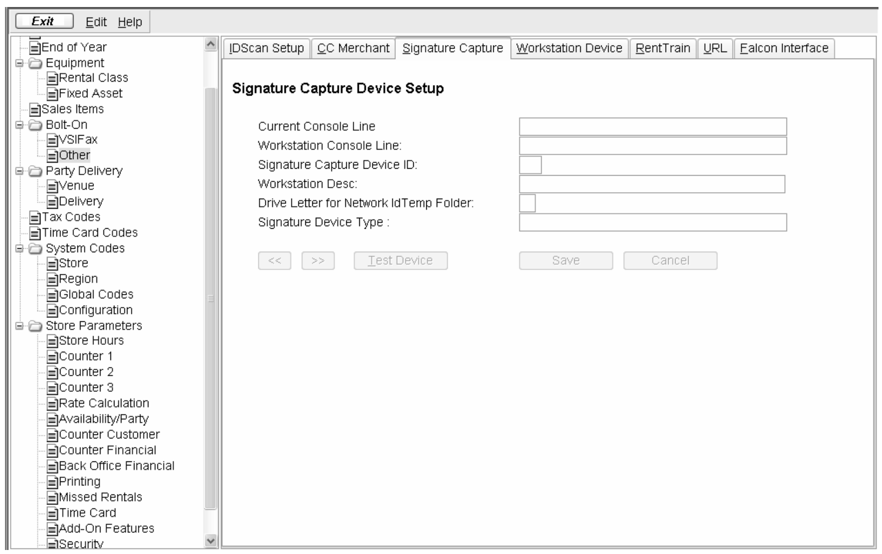
Signature Capture

Signature Capture allows you to save the image of a customer's signature along with the contract in Alert. This feature requires additional setup by Alert. Please contact the Alert Sales Department at (800) 530-8050 ext 4 for a custom quote.

Signature Capture Setup

The first step that needs to be completed is to indicate in Store Parameters that you will be using Signature Capture. In **Codes and Setup**, under **Store Parameters**, select **Printing**. Flag the “Utilize Signature Capture?” field with a check mark for each location using the feature. Use the **F2Prev** and **F3Next** to navigate to other store locations setup on your system. You will also need to mark the “Save Contract Image?” on **Counter-1** in **Store Parameters**.

Next, you will need to define each workstation that will be using Signature Capture. In **Codes and Setup**, under **Bolt-on,** select **Other.** Then select the **Signature Capture** tab.



The Signature Capture setup screen allows you to add a record for each workstation that has a signature device. This screen uses the PC Workstation identifier (console) for the workstation name. Your current console name is listed in the first field on the screen. To add an entry, you will want to access this screen logged in from the actual workstation that the signature device is connected to.

Click **F5Add** to begin adding the workstation record.

Workstation Console Line – This field will automatically be populated when you click F5Add.

Signature Capture Device ID – Enter a unique device ID number for each workstation. If you have a dynamic DHCP, there is a possibility that the console setting could change for the workstation. The signature capture device ID can also be set in the user line file (al_line) if this becomes a problem. Contact Alert Support if you need assistance at (800) 326-0079.

Workstation Description – Enter a description for the workstation.

Drive Letter for Network IDtemp Folder – You must map a drive letter from your workstation to the server IDtemp folder. Enter the drive letter you setup.

Signature Device Type – Select the correct device type for the signature device you have setup on your workstation. (The Ingenico option is currently unavailable).

Once you have entered this information, click **Save**, then click **Test Device**. If the setup is correct, then a signature screen will display. Sign the device and press Accept. Alert will confirm that an image file was created. If no image is found, then a message will appear asking you to double-check the setup.

Using Signature Capture at the Counter

Signature Capture is only available for open contracts and will be activated when the following apply:

- The ticket is a contract
- If there is a change to the ticket total on a contract then the signature screen will appear. Simply click Cancel if you do not want to capture a signature.
- If a payment has been made and the contract is to be printed. Signature Capture is not activated when Save Only is selected.
- The option to use Signature Capture has been added to the View/Print/Fax screen.
- Signatures that have been captured are stored on the ticket save image in the log files. To display a contract with a signature, simply click on the display for the log entry.

Ticket Bar-coding

Ticket Bar-coding was designed to reduce labor costs. This is achieved by streamlining the check-in process, generating department specific reports, and assigning tickets to the **Expanded Truck Report** in order of delivery/pickup.

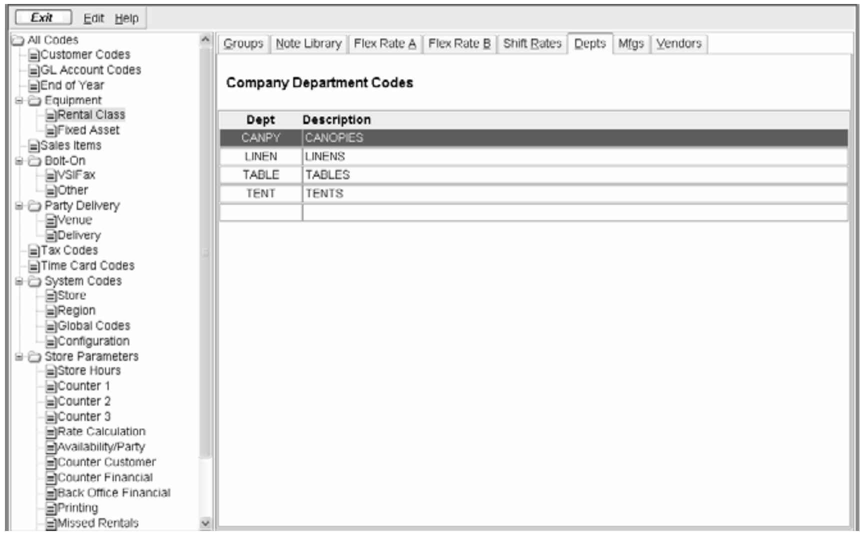
Implementation of Ticket Bar-coding requires system integration to change the contract form to print a bar code. Contact the Alert sales department for a quote at (800) 530-8050 ext 4.

Hardware Requirements: Laser printers supporting barcode fonts and a barcode scanner.

Software Requirements: true type fonts need to be loaded on every PC that prints tickets and you must be running Alert version 7.2 or newer.

Company Department Codes

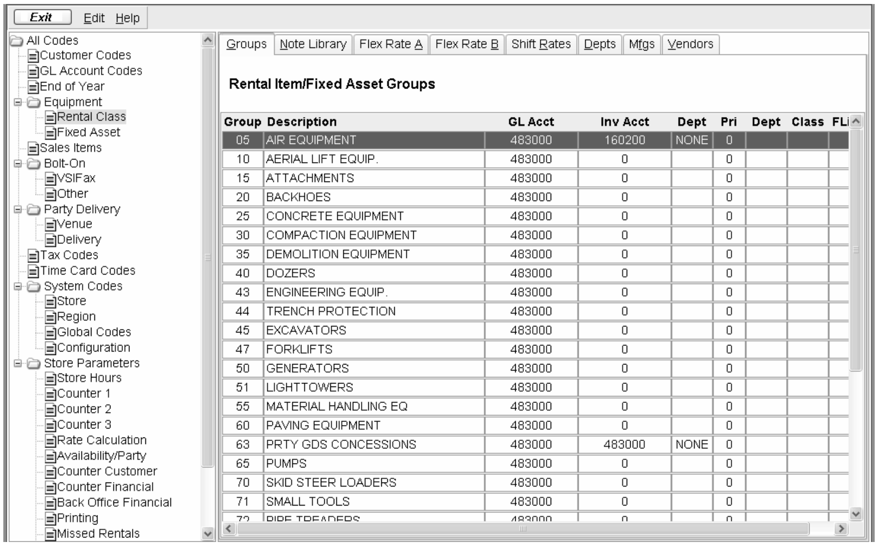
Company Department Codes allows you to assign codes to different areas of your company/warehouse. For example, you might have a linen department, a tent department and a china department. **Company Department Codes** under Equipment in **Rental Class**. Then select the **Depts** tab.



Adding Company Codes:

1. To add a new **Company/Department** code click **F5Add**.
2. To change an existing code, click **F6Chng**.
3. The first field contains the Department code. This field holds 5 alphanumeric characters. Press **Enter** after entering in the department code.
4. The second field contains a description of the department code. Type in a description for the code entered in step 3, then press **Enter**.

The next step is setting up Ticket Bar-coding is to assign each rental group to a company/department. **Rental Groups** can be accessed under **Equipment** in **Rental Class**.



Assigning Rental Groups:

1. The **Dept** column has been added to allow you to assign rental groups to a department code. Highlight the rental group you want to assign and press **F6Chng**. You can also double-click on the Dept field.
2. Press **Enter** until you are in the **Dept** column.
3. Type in the Dept code, or press **F1Help** for a list of available department codes.
4. Not all rental groups need to be assigned a department code. Assign codes to those you choose, and then exit by pressing **F10Back**.

Expanded Truck Report

The **Expanded Truck Loading Report** can be used with Ticket Bar-coding to scan tickets in the order or delivery/pickup. The Expanded Truck Report can be found on the Delivery/Pickup Reports menu located on the Counter Reports menu.

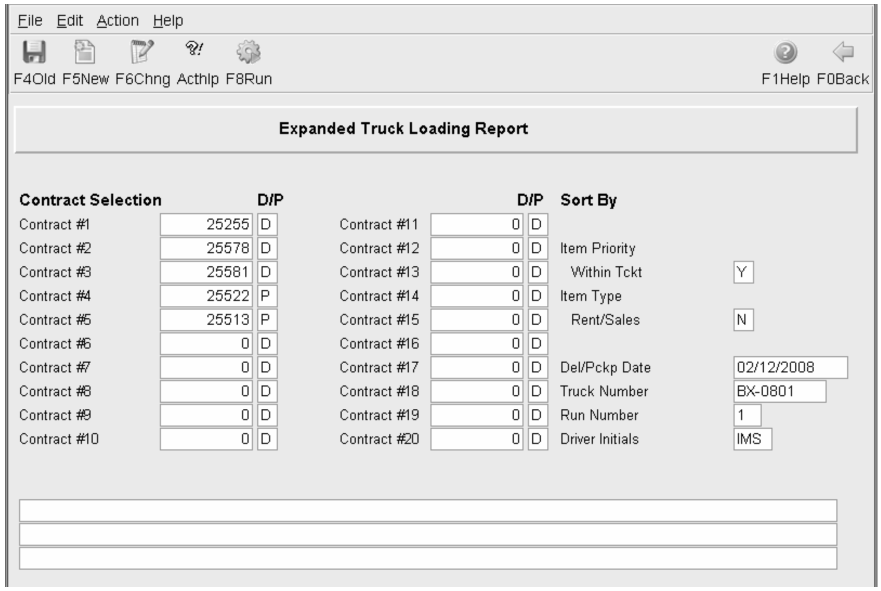
Select **Scan Ticket** from the **Action** menu. The system will then ask if this is a new truck report or an existing truck report.

New Truck Report

If the truck report is a new report, the system will default the current date and activate the barcode field. You can scan in tickets in the order of delivery/pickup. If the ticket out date is for today or in the future, then Alert will assume it will be a delivery. If the ticket out date is in the past, then Alert will assume the ticket will be picked up.

Existing Truck Report

If the truck report is an existing report, then Alert will prompt for the date, truck number, run number and driver. Any existing information will be displayed and the barcode field will be displayed. You can begin scanning in additional tickets. Enter a 0 in the barcode field to exit scan mode. You will then be able to run or change the information as needed.



Warehouse Ticket Check-in

The **Scan Ticket for Check-In** option is located on the on the main menu under Counter Menu. This allows warehouse staff to enter their initials and scan each returned contract. For each contract that is scanned, Alert checks in all the rental items using the current date/time and prints out a report by company/department (as setup in Rental Groups) of the items returned. The report can then be distributed to the various departments to check the return. Final sales items will not be processed.

Print and Screen Note Library

Contents

Using the Print and Screen Note Library

The **Print and Screen Note Library** allows you to create, change and save lines of text that are linked to a rental or sales item and appear on either the printed ticket or the counter screen.

NOTE: Only Print notes can be linked to a sales item, however you can specify for the print note associated to a sales item to be display only – the note will not print on the contract.

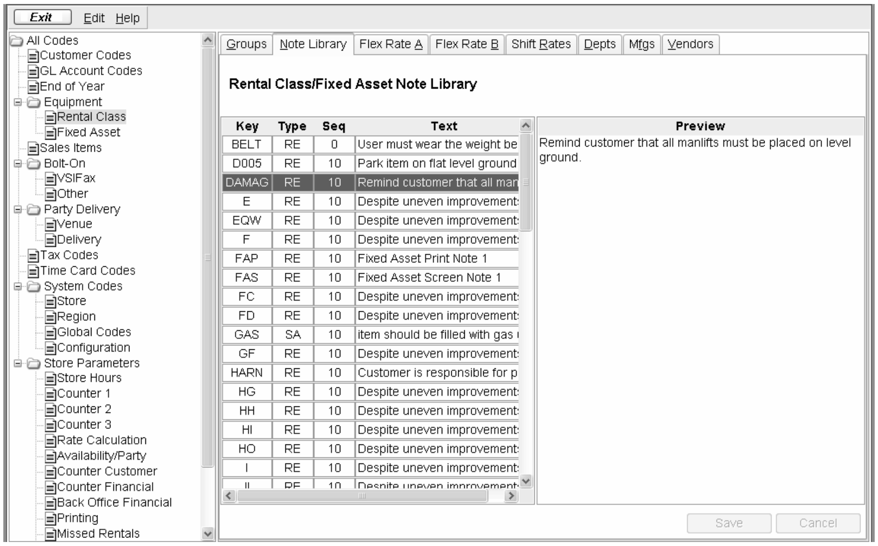
To access the **Print and Screen Note Library**, at the **Codes and Setup Menu**, select **Rental/Sales Item Codes** → **Print and Screen Note Library**.

Creating a Print or Screen note

Print and Screen notes are created by entering a Note Key, a Note Class, and then entering the text of the note. Note Keys are five digit codes (letters or numbers) that are used to add the Print or Screen note to a ticket or link the note to a rental or sales item. The Note Class determines if the note you are setting up will be used for rental or sales items.

How to add a Print or Screen note:

1. In **Codes and Setup**, under **Equipment**, select **Rental Class** then select the **Note Library** tab.



2. To add a new note, click **F5Add**.
3. Enter a Note Key for this note. It may be any combination of letters and numbers but must be unique.
4. Enter a Note Type for the note. Enter **RE** if this note will be linked to rental items or **SA** if it will be linked to sales items.
5. Enter the text of this note.
6. When you are done entering the note, click **Save**.

Linking a note to a rental or sales item

Notes you have added to the Print and Screen Note Library are normally linked to a rental or sales item so that when the item is added to a ticket, the note automatically prints on the ticket (Print note) or is automatically displayed on the screen (Screen note).

HINT: You can also select a Print note at the counter, even if the Print note isn't linked to any of the items selected on the ticket.

How to link a note to a rental item:

1. From the **Main Menu**, select **Rental Class**
2. Enter the item's Rental Class number or name, and select it from the index.

3. To add a Print note (i.e. appear on the printed contract), select **Print Notes** from the **Edit** menu.
4. To add a Screen note (i.e. appear on the counter screen), select **Screen Notes** from the **Edit** menu.
5. A screen with all current notes related to this item will appear. To add the new note, click **F5Add**.
6. Enter the Note Key. If you do not know the Note Key, you can view a list of available notes by clicking **F1Help**.
7. When creating a Print note, you will be prompted to select the type of Print note you want. You have five options:
   - Enter **B** (for Bottom) if you want the note to appear at the bottom of the ticket, after all items.
   - Enter **T** (for Top) if you want the note to appear at the top of the ticket before all items.
   - Enter **L** (for Lock) if you want the note to appear immediately after the rental item.
   - Note types **P** (pickup) and **D** (delivery) are reserved for Party Affinity and only used on the Expanded Truck Report.
8. In the collapse column, enter a **Y** if you want the note to collapse on kit tickets, otherwise enter **N**.
9. The text will now appear on the screen, and the note has now been linked to this rental item. Whenever it is selected, the note will appear as indicated by its type.

How to link a print note to a sales item:

1. From the **Main Menu**, select **Rental Class**.
2. Enter the item's manufacturer catalog number or name.
3. If you entered an exact catalog number, skip to step four. Otherwise, select the correct item from the index.
4. To add a Print note (i.e. appear on the printed contract), select **Print Notes** from the **Edit** menu.
5. A screen with all current notes related to this item will appear. To add the new note, click **F5Add**.
6. Enter the Note Key you selected when creating this note originally. If you do not know the Note Key, you can view a list of available notes by clicking **F1Help**.

7. The computer will ask you to select the type of Print note you want. You have four options:
   - Enter **B** (for Bottom) if you want the note to appear at the bottom of the ticket, after all items.
   - Enter **T** (for Top) if you want the note to appear at the top of the ticket before all items.
   - Enter **L** (for Lock) if you want the note to appear immediately after the sales item to which it is linked.
   - Enter **D** (for Display) if you want the note to display only (does not print).
8. The text will now appear on the screen, and the note has now been linked to this sales item. Whenever it is sold, the note will appear as indicated by its type.

Toolbar options available in the Note Library

Edit – Add or F5Add

If you want to add new lines of text to an already existing note, click **Add**. Then enter the Note Key of the note you want to add to. When the note appears, simply begin typing the new text. When you are finished, click **Save**.

Edit – Change or F6Chng

If you want to change any part of a note, scroll through the notes and highlight the note you want to change. Click **Change** and then press **Enter** until you get to the entry that you want changed. Enter your corrections, and then click **Save.** You can also double-click any field to change it.

Customizing your system with Store Parameters

Contents

What are Store Parameters?

Store Parameters are sets of questions that allow you to customize the way Alert EasyPro works at your rental store. Examples of parameters include your store's hours, accounting procedures, methods for handling weekend rates, and security controls for accessing areas of the Alert EasyPro system.

Store Parameters are set up initially by an Alert staff member, using information you provided when you completed the Installation Questionnaire.

To review and change settings in Store Parameters:

At the **Main Menu**, select **Codes and Setup**. All of the information listed under **Store Parameters.**

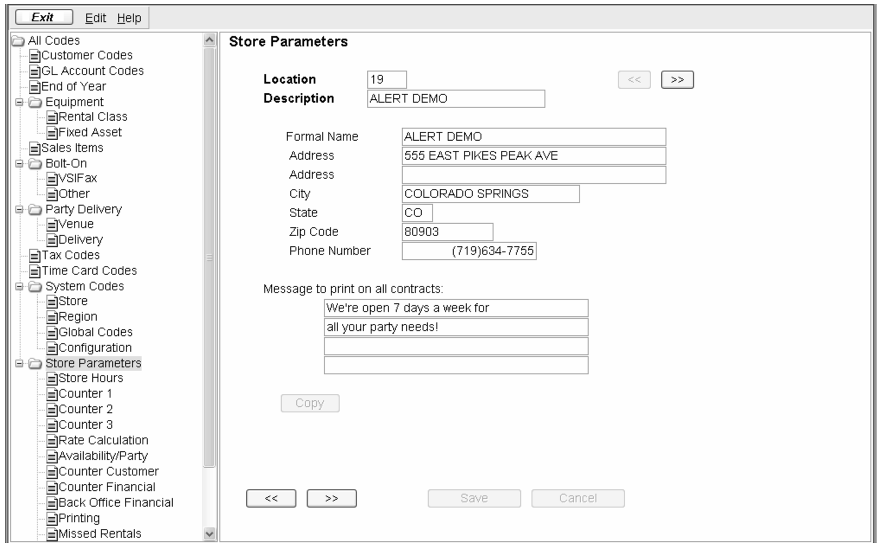
NOTE FOR MULTI-STORE LOCATIONS: When you access store parameters, before reviewing/editing any information, you should select the store you want to view parameters for. To do this, on page one, click **F2Prev** or **F3Next** until the store you want appears in the Store ID box.

INITIAL SETUP FOR MULTI-STORE LOCATIONS: Store parameters must be entered for each store location. Your Alert installer can assist you in copying store parameters for your first store to the remaining store locations.

Store Details

The first page of **Store Parameters** contains information about your store's location and any message you want automatically printed on tickets. **Store Details** can be found by clicking on the **Store Parameters** folder.

To add a store, click **F5Add**. Use the directional arrows to the left of the store name to browse to additional stores. Use the arrows at the bottom of the screen to move to the next page of Store Parameters.



Field Descriptions

Location

This field holds the code for the current store. This field can hold up to three alpha-numeric characters. This field should not be changed after initial setup.

Description

This field holds a unique description for this location and should not be changed after initial setup.

Formal (printed) name for this location

Enter the full name you want to appear on tickets and statements.

Address

Enter this store's address.

Address (if necessary)

If your store has a second street address or P.O. Box, enter it here.

City, State, Zip Code

Enter the store's city, state and zip code in these fields.

Phone Number

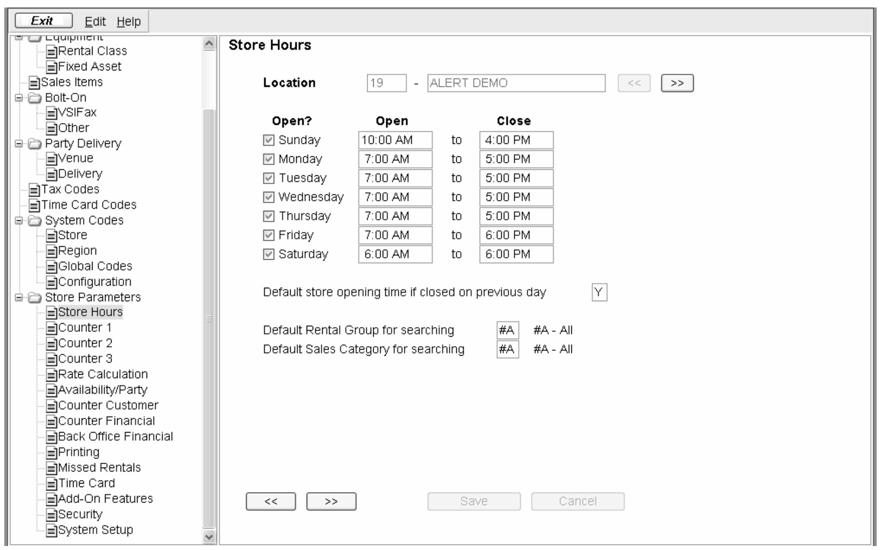
Enter the phone number for this store. Do not use dashes or parentheses.

Message to print on all contracts

These fields allow you to enter a message that will appear on all printed tickets. Each line of the message is limited to 30 characters. This message can be changed at any time for marketing or other announcements about your business. When you run out of room on the first line, press **Enter** and continue typing the message on the next line.

Store Hours

The second page of Store Parameters contains information about your store hours, as well as two parameters that govern what rental groups and sales categories appear in search listings.



Field Descriptions

Store Hours

The top part of the page is used to set up your store hours. Place a check-mark next to each day of the week you are open. Then enter the opening and closing time for each day of that you are open. Time must be entered using a 24-hour clock (military time) and in the format **HH:MM:SS**. The time will be converted automatically to a 12-hour clock and indicate AM and PM.

NOTE: If you are closed on a given day, you should still enter opening and closing times, but make sure the day is marked as closed.

Default Rental Class for searching

When searching for a rental item, Alert EasyPro allows you to search the entire listing of rental items, or narrow your search by selecting which **rental group** to search in.

We suggest you accept the default entry of **#A** (for All). This will ensure that when you first enter a rental search screen, all rental groups will be displayed in the index. If you would like to restrict all initial rental searches to just one Rental Group, enter a two-digit Rental Group in this field or click on the drop-down list to select a rental group.

Default sales category for searching

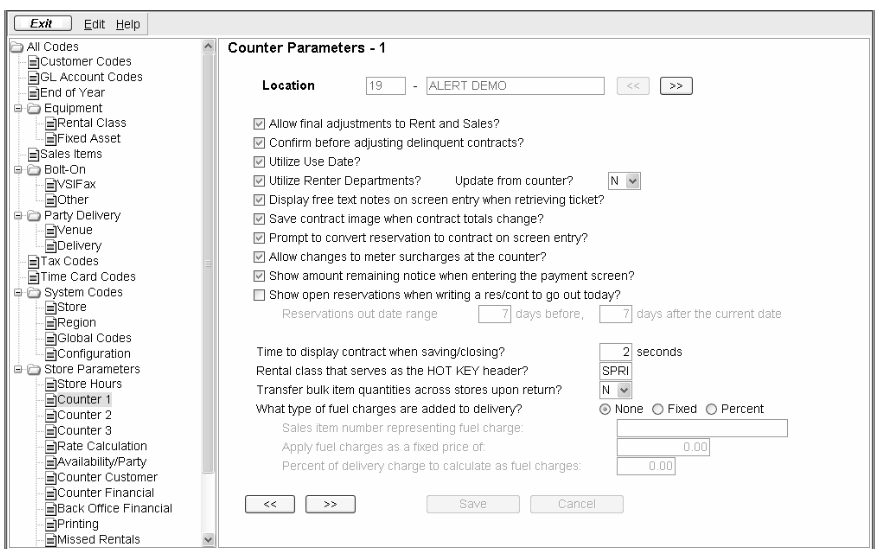
When searching for a sales item, Alert EasyPro allows you to search the entire listing of sales items, or narrow your search by selecting which **sales category** to search in.

We suggest you accept the default entry of **#A** (for All). This will ensure that when you first enter a sales search screen, all sales categories will be displayed in the index.

If you would like to restrict all initial sales searches to just one sales category, enter a two-digit sales category in this field or click on the drop-down list to select a category.

Counter 1

The parameters on this page determine many of the ways the Counter System will work for your store.



Field Descriptions

Allow final adjustments to Rent and Sales?

If you want your staff to be able to adjust the total rental or sales charges on the Payment screen, then check the box.

Confirm before adjusting delinquent contracts?

When an open contract is accessed at the counter, the system compares the In Date with the current date. If the In Date is prior to the current date, the system considers the contract as "delinquent". You can either have the system automatically change the In Date to the current date and time without notifying you by leaving the box blank, or you can have the system notify you that the contract is delinquent and confirm the ask if you want change the In Date to today's date and time by checking the box.

Utilize Use Date?

The Use Date is an informational field that holds the date the rental items on a ticket will be used. This feature is usually used by party/event rental stores who need to know when the items will be used to better coordinate setup and delivery.

If you want to be able to enter Use Date information when writing a ticket at the counter, then place a check mark in the box.

Utilize Renter Departments?

Renter Departments provide a method for tracking rental income. The departments broadly categorize each rental transaction by type. Common Renter Department types include contractor, party, and homeowner. (Renter Departments are commonly used to track rental types for insurance purposes or to track how a customer heard about your rental store.)

If you enter check the box, you will be asked to classify each customer when writing tickets at the counter. If you note, the Renter Department will not be required.

NOTE: Because the Renter Departments feature categorizes transactions, not specific customers, you will be asked for a Renter Department for each transaction (even if the customer you select is a returning customer).

Update from Counter (A)Always, (P)Prompt, or (N)Never?

Type in the corresponding letter (A,P or N) to indicate how you want Alert to update the Customer Renter Dept based on information entered from the Counter system.

Display free text notes on screen entry when retrieving a ticket?

One of the free text note types is **D** (for display). If you enter check this box, then free text notes of this type will appear on the screen when you are pulling up an existing ticket. If you do not want these free text notes to automatically appear, then leave the box unchecked.

Save contract image when contract totals change?

If you would like to capture the image of a contract when totals on the contract change, then check the box. The image of the contract is stored in the log file. The log file can be accessed by typing **LOG** into the function box when a ticket is pulled up in the counter system.

Prompt to convert reservation to contract on screen entry?

If you enter check the box then, when a reservation is accessed at the counter and the out date is today's date, a prompt will ask the user if the reservation should be converted to a contract. If you do not want to be prompted, then leave the box blank.

Allow changes to meter surcharges at the counter?

If you enter **Y**, then, when a returned metered item has excess meter units and a meter surcharge is automatically calculated, the user will be able to edit the number of excess meter units and the resulting amount that was charged for the excess meter units.

Show amount remaining notice when entering the payment screen?

If you enter check the box, then when you enter the payment screen a box will display the amount due from/to the customer. The user will need to click the OK button to clear the box. If you do not want this notice to appear, then leave the box blank.

Show open reservations when writing a res/cont to go out today?

When a reservation or contract is being created, and is scheduled to go out today, the system will display existing open reservations for that customer. This feature helps prevent ticket duplication in your system. If you check this box, then you will need to edit the Reservation out date range below as well.

Reservations out date range __days before, __days after the current date.

This field should only be changed if the previous question has been checked. This day range establishes which reservations and contracts already in the system for that customer will be displayed.

Time to display contract when saving/closing?

Enter the number of seconds you would like ticket information to be displayed after you save, print, or close a ticket. Ticket information includes the ticket number, and the amount due.

Rental class that serves as the Hot Key header

Enter the four-digit **Rental Class** that will be used to designate Hot Key items. This must be a unique, four character rental key. See the **File Maintenance Manual** to learn how to set up Hot Key items.

Transfer bulk item quantities across stores upon return?

In a multi-store environment, the Alert system can transfer bulk items when they are being returned on a contract. If you want to use the bulk item transfer feature then you will need to enter either **P** or **T**. Entering **P** will cause the system to prompt you for a return location each time you return bulk items. Entering **T** will automatically return the bulk items to the current terminal location. Once items have been transferred, a log entry will be made in the maintenance notes section in File Maintenance. If you do not want to use this feature, then enter an **N** here.

What type of fuel charges are added to delivery?

If you do not want to add a fuel surcharge to delivery tickets, then select **None**. If you do want to add a fuel surcharge, then you will need to decide how you want to calculate the charge. To calculate the charge as a percent of the total delivery fee, select **Percent**. Otherwise you will need to decide on a fixed amount and select **Fixed**.

Sales item number representing fuel charge

If you are going to assess a fuel surcharge to delivery tickets, then you will need to setup a sales item that will be added to the ticket for the surcharge. Once you have added the sales item to your system you can indicate it here.

Apply fuel charges as a fixed price of ___

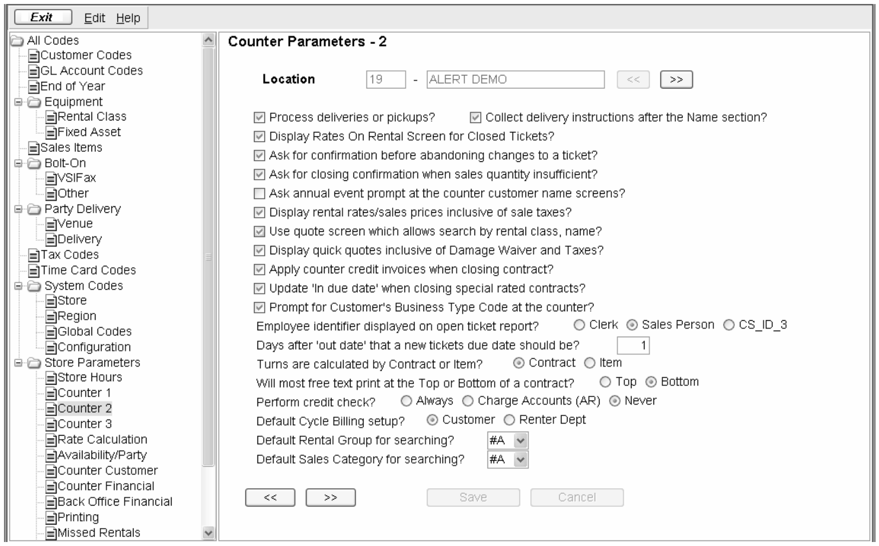
Type in the amount you want to assess on delivery tickets for a fuel surcharge. The system will use this amount if you selected Fixed.

Percent of delivery charge to calculate as fuel charges:

Type in the percentage of the delivery charge you want to assess on delivery tickets.

Counter 2

The parameters on this page determine many of the ways the Counter System will work for your store.



Process deliveries or pickups?

If your store delivers and/or picks up items, then check the box. If you do not check the box, then the Delivery, Pickup, and Area fields in the Time box at the Counter screen will not appear.

Collect delivery instructions after the Name section?

You can set up your system to automatically prompt for delivery instructions after entering customer information on a ticket. If you deliver your items more often than not, we suggest you select this feature. If you do not, then the system will not automatically prompt for delivery instructions. (You may, however, enter delivery instructions using the Free Text note feature.)

NOTE: If you select this option, you should follow this sequence when writing a ticket: Click F3Time first and set delivery to Y when writing a ticket. Then click F4Name and enter customer information. The system will then take you to the Free Text notes screen and you may begin to enter specific instructions for your driver.

Display Rates on Rental Screen for Closed Tickets

When displaying closed tickets (either at the counter or from the customer's file), you can view information on the rental items that were on the ticket by pressing **F5Rent**. If this parameter is selected, rates information will appear for each rental item on the ticket. If not, Out and In meter reading information will be displayed instead.

Ask for confirmation before abandoning changes to a ticket?

If you check this box, and have made changes to a ticket and choose to exit the Counter System without saving, then you will be prompted to confirm that you want to abandon changes.

Ask for closing confirmation when sales quantity insufficient?

If you close a ticket and the system shows that there are not enough sales quantities on hand to complete your order, the system will prompt you to confirm the closing of the ticket if you select this option. Otherwise there will be no check for confirmation.

Ask annual event prompt at the counter customer name screens?

If you would like to track whether a ticket is for an annual event (thus enabling you to contact the customer next year to proactively ask for the same order next year), then check this box. When this parameter is selected, a prompt will appear ("Is this going to be an annual event?") after the customer name is added to a ticket. If you click **Yes** at the prompt, the ticket will appear on the **Annual Events Report** (found on the **Marketing Menu**). If you don't want the prompt to appear, enter then do not check the box.

Display rental rates/sales prices inclusive of sales taxes?

This parameter is currently used only by Alert EasyPro clients in Australia. If selected, sales tax is automatically added to the rates displayed on equipment listings when selecting rental equipment at the Counter.

NOTE: Damage waiver and SME tax are not added to the rate. We suggest that American clients do not use this feature.

Use quote screen which allows search by rental class, name?

Select this option if you would like to be able to search for rental items by Rental Class, then by name. Otherwise do not select the box.

Display quick quotes inclusive of damage waiver and tax?

Select this option if you would like the Quick Quote function at the counter to show rental rates including damage waiver and tax.

Apply counter credit invoices when closing contract?

If this parameter is selected, when you close an AR ticket with a negative amount, a prompt appears: "Do you want to apply this credit invoice to an existing invoice?" If you click **Yes,** the Credit Memo processing screen appears and you can apply the negative contract to an outstanding invoice. For complete instructions on creating a negative contract, see "Applying negative contracts to open invoices or debit memos" in the **Customer Manual**.

Update in due date when closing special rated contracts?

Normally, if a ticket uses Special Rates, the system will not enter information in the In Due Date field (the date of the last checked in item). However, if you do want the In Due Date to be updated on a ticket with Special Rates, then select this field.

NOTE: For more information on Special Rates, see "Time In / Out Functions" in the **Counter Manual**.

Prompt for customer business type at the counter?

If you check this option, then at the counter when you are adding a customer to a ticket, the cursor will stop on the business type field. The current business type for the customer will be the default entry. If the business type is changed, then the main customer record will also be changed to reflect the new entry. If you do not want the opportunity to change the business type at the counter, then leave the box unselected.

Employee identifier to show on open ticket report

An employee identifier can now be printed on the Open Tickets Report. Select the option that you would prefer to have printed, clerk initials, Salesperson initials, or the contents of CD_ID_3.

NOTE: CS_ID_3 is a field contained in the customer file. The label for CS_ID_3 can be changed on Counter-2 in Configuration under System Codes. The field in the customer file is 10 characters long.

Days after 'out date' that a new tickets due date should be?

Enter the number of days after the Out Date that you want as the default Due In Date for a ticket. For example, if most of your rentals are for one day, enter **1** in this field.

Turns are calculated by Contract or by Item

If turns or rents are calculated by contract, select **Contract**. If they are calculated by each item on the contract, select **Item**. For example, if a contract with 8 tables is counted as one turn, select **Contract**. If, however, that contract would be counted as 8 turns because of the 8 items on the ticket, select **Item**.

Will most Free Text print at the Top or Bottom of a contract?

This parameter determines whether the default placement of a Free Text note is printed at the top or the bottom of a ticket. (A Free Text note is a comment that you can type in when writing a ticket. This note is then printed on the ticket.) If you would like Free Text notes to normally print at the top of the ticket (before the rental items), select enter **Top**. If you would like them to print on the bottom of the ticket (after the rental items), select **Bottom**.

Perform credit check

Select **Never,** if you do not want any warning when customers are over their credit limit. Select **Always** if you always want a warning when a customer is over their credit limit. You can also select **Charge Accounts (AR)** to perform a credit check only on accounts receivable customers. If a credit warning appears, a manager's employee number will be required to clear the credit warning.

Default Cycle Billing setup?

If you are using Cycle Billing, select **Customer** if you want the ticket level cycle billing to default to data stored in Customer File Maintenance. Or you can select **Renter Dept** to default to cycle billing based on the Renter Dept selected on the ticket.

Default Rental Class for searching

When searching for a rental item, Alert EasyPro allows you to search the entire listing of rental items, or narrow your search by selecting which **rental group** to search in.

We suggest you accept the default entry of **#A** (for All). This will ensure that when you first enter a rental search screen, all rental groups will be displayed in the index. If you would like to restrict all initial rental searches to just one Rental Group, enter a two-digit Rental Group in this field or click on the drop-down list to select a rental group.

Default Sales Category for searching

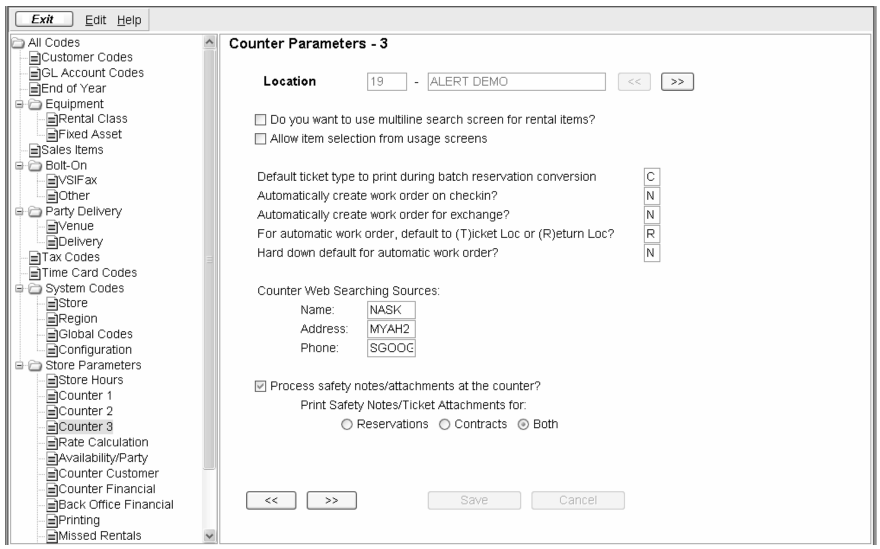
When searching for a sales item, Alert EasyPro allows you to search the entire listing of sales items, or narrow your search by selecting which **sales category** to search in.

We suggest you accept the default entry of **#A** (for All). This will ensure that when you first enter a sales search screen, all sales categories will be displayed in the index.

If you would like to restrict all initial sales searches to just one sales category, enter a two-digit sales category in this field or click on the drop-down list to select a category.

Counter 3

The parameters on this page determine many of the ways the Counter System will work for your store.



Field Descriptions

Do you want to use multi-line search screen for rental items?

If you want all rental rates to be listed on the screen when searching for a rental item, then select this option. This setting allows you to provide complete rate information directly from the search screen, but limits the number of rental items that can appear on each screen.

If you leave this item unchecked, only one line of rates will be shown on the search screen. More rental items will fit on the search screen, but you cannot see the complete rate structure for each rental item until it is added to the ticket.

Allow item selection from the usage screens?

Selecting this parameter will allow counter personnel to pick an item to rent that is out on rent on another contract.

Default ticket type to print during batch reservation conversion?

Select the ticket type you want printed during batch reservation conversion. Available ticket types can be viewed by clicking the drop-down arrow (F1Help): Contract, Delivery, Kit, None.

Note: The next four parameters relate exclusively to the Work Order Generator module. Please refer to the Work Order manual for information regarding these parameters.

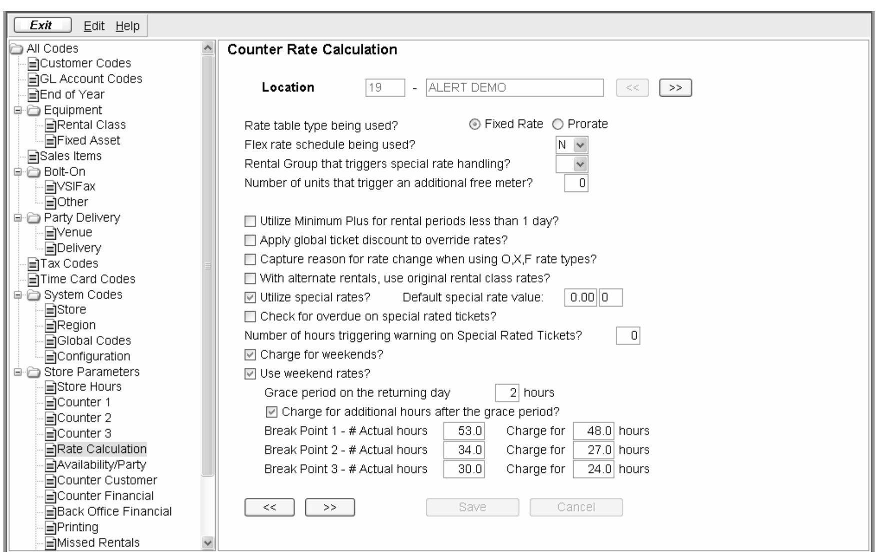
Counter Web Searching Sources

Select the website you want to use for each type of web search: name, address and phone number. The websites are setup under **Bolt-on**. Select **Other** then click the **URL** tab. Alert has a number of URL's pre-entered for each search type. You may add additional URL's if needed. Counter Web Searching is described in detail in the Counter Manual.

Process safety notes/attachments at the counter?

Safety Notes are notes or documents that are associated with rental class. If you want to view and have the option to print safety notes at the counter, then select this option. When this option is selected you will have the choice to process safety notes for only reservations, only contracts, or for both types of tickets. Safety Notes will not be available at the counter if this option is not selected.

Rate Calculation

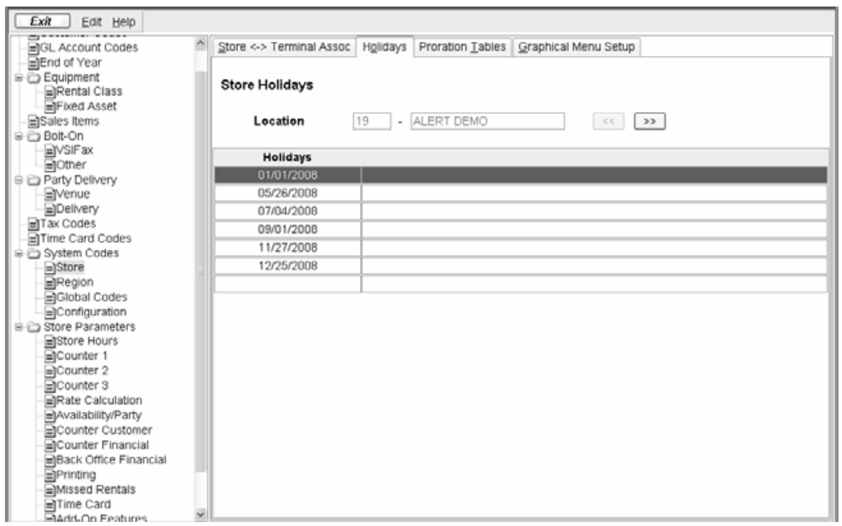


Rate type being used?

If you prorate rental charges, select Prorate**. If your rates are assessed on a fixed rate table, select** Fixed**. (For more information on Pro-ration, see "Holidays**

This file lists the holidays for which your store is closed during the current year. This list should be updated at the beginning of each year.

To edit **Holidays**, under **System Codes**, select **Store**. Then click on the **Holidays** tab.



Field Descriptions

Location

NOTE: This field only needs to be changed by multi-store locations.

This field shows the store location for which the holidays are listed. To see the holiday for a different store, click the left and/or right arrow buttons next to the store location.

Holidays

This field lists the dates for each holiday during the current year. To enter or change a date, use the format **MMDDYYYY**.

Pro-ration Tables by Store" on page 22.)

Do you use flex rates?

Enter **None** if you do not use flex rates. If you are going to use flex rates you need to either enter **A**, **B** or **C**. Enter **A** if you are going to use the flex rate table A which are flex rates based on a date range. Enter **B** if you are going to use the flex rate table B which are flex rates based on days of the week. Enter **C** if you use a combination of both flex rate tables.

Rental Group that triggers special rate handling

Alert EasyPro allows you to set up scaffold rates by assigning a Rental Group in which rate structures will be based on a typical scaffold rate structure (i.e. $5.00 for the first day, $3.00 for the second day, and $2.50 for the third day and all subsequent days). Enter the Rental Group to be used for this special rate handling in this field.

NOTE: For more information on setting up scaffolding rates, see the **File Maintenance Manual**.

Number of units that trigger an additional free meter?

If you award free meter units after a certain number of charged units, enter that number here. This is usually equal to one day's rental. (Thus, after one day, the customer would receive the number of free units initially given.)

NOTE: If you use more "increasing" meters (such as miles or meters) versus "decreasing" meters (such as blade wear), 6 is normally entered here. If you use more "decreasing" meters, enter 0 (zero).

Utilize Minimum Plus for rental periods less than 1 day?

Every rental item's rate structure includes a minimum rental term and a minimum rate. If you do not select this option, then when an item is rented for more than the minimum term, the computer will disregard the minimum rate and simply use the hourly, daily, etc. rates for this item to calculate the total amount charged.

If you select this option, then when an item is rented for longer than the minimum term, the computer will take the minimum rate and charge this amount for the minimum term. Any time over the minimum term will be charged using the hourly, daily, etc. rates.

For example, consider a cement bit with a minimum term of 4 hours and a minimum rate for this term of $5.00. The hourly rate is $1.50. If this item is checked out for 6 hours and the minimum plus rate is not used, the total cost of the rental will be $9.00 (6 hours multiplied by the hourly rate of $1.50).

If the minimum plus rate is used, then the cost is $8.00 (the first 4 hours cost $5.00 and the additional 2 hours are charged at the hourly rate of $1.50).

Apply global ticket discount to override rates?

If you write a ticket for a customer that is set up for a discount (in the Discount Rate field in **Customer Inquiry**) and then override rental rates, you can either give the customer the overridden rates but discard the customer's normal discount, or apply the customer's discount to the overridden rates. If you want the customer's discount to apply to Override rates, then select this option. If not, leave this box unselected.

For example, suppose a customer normally gets a 10% discount and rents an item that has a daily rate of $100. At the counter, the daily rate is overridden to $80. If you choose to apply the customer's discount to this overridden rate, the daily rate would be $72 ($80 minus 10% ($8) = $72). If you choose not to apply the customer's discount, the customer would be charged $80 per day.

Capture reason for rate change when using O,X,F rate types?

If a rate is changed using the Override, X-tra Discount, or Fixed rate types, you can require counter staff to type in a reason why the rate was changed by selecting this option. A prompt will appear: "Reason for change:" The reason entered will appear on the **Exception Report**. If you don't want to require your staff to enter a reason why rates were changed, then leave this option blank.

With alternate rentals, use original rental class rates?

When you select an alternate rental item at the counter (see File Maintenance Manual for setup information) you are asked if you want to use the alternate rental rates or the original rates. If you select this option, then the prompt at the counter will be defaulted to using original rental rates for the alternate. If you do not select this option, then the prompt will be defaulted to using the alternate rental rates.

Do you use special rates?

The special rates feature allows you to fix the time period used to charge for a rental. For instance, you can use the special rate feature to charge the customer for one day, even if the customer had the items out on rental for three days. Special rates are used primarily by party/event rental stores.

If you do not want to use special rates, then leave the box unselected. If you use special rates on some or all tickets, then check this option. Then enter the default rate you want to appear in the Time box. For example, if you want the default rate to be 1 day, type **1** and press **Enter**. Then enter **D** (for Days).

TIP: Other default rates: **H** (Hours), **W** (Weeks), and **0** (zero) for none.

NOTE: If you enter N in the Use Date and Special Rate parameters, the Use Date/Time line and SpecRt field in the Time box will not appear at the counter.

Check for overdue on special rated tickets?

If you select this option, the Counter System will check the In Date and Time of contracts with a Special Rate and provide a warning message if the contract is overdue. The message states: "Ticket has special rate and is late. Press Esc to continue." After pressing the Escape key, you can adjust rental charges to account for the overdue items. The next parameter determines when tickets are defined as overdue.

Enter # Hours which will trigger the warning on Special Rated Tickets

This parameter determines how many hours a contract using Special Rates can be late before an overdue warning is displayed. The warning will not appear unless the parameter "Check for overdue on special rated tickets" is selected.

Charge for weekends?

If you do not charge for <u>either</u> Saturday or Sunday, then leave this field blank. The system will not charge for Saturday and Sunday, even if the contract Out and In dates include weekend days. If you charge for either Saturday or Sunday, then you will need to select this option.

Do you use weekend rate?

Weekend rate calculations allow you to charge less over the weekend because your store is closed on Sunday. Weekend rates are calculated using the three Break Point and Charge for ___ hours parameters below. If you want to discount rental charges incurred over the weekend, then select this option, otherwise leave this option blank. See the description of Break Point and Charge for __ hours for details on how Weekend Rates are calculated.

NOTE: You cannot use Weekend Rates if you are open on Sunday.

Grace period on the returning day?

Enter the number of hours of grace you allow when an item is returned and weekend rates are applied to the rental. For instance, if you open at 8am but do not charge overtime until 10am, you would enter 2 here.

Do you charge additional hours after the grace period?

If you allow weekend rates to be applied if the item is returned after the grace period on the returning day, then select this option.

Break Point - # actual hours / Charge for ___ hours

Weekend Rates are set up by comparing the actual number of hours accrued over a weekend and then defining the number of hours to charge. Up to three break points can be set up to calculate Weekend Rates.

The following scenario will help you to understand how Weekend Rates work. Suppose a customer rents an item on 5pm on Friday and returns the item one hour after the store is opened on Monday.

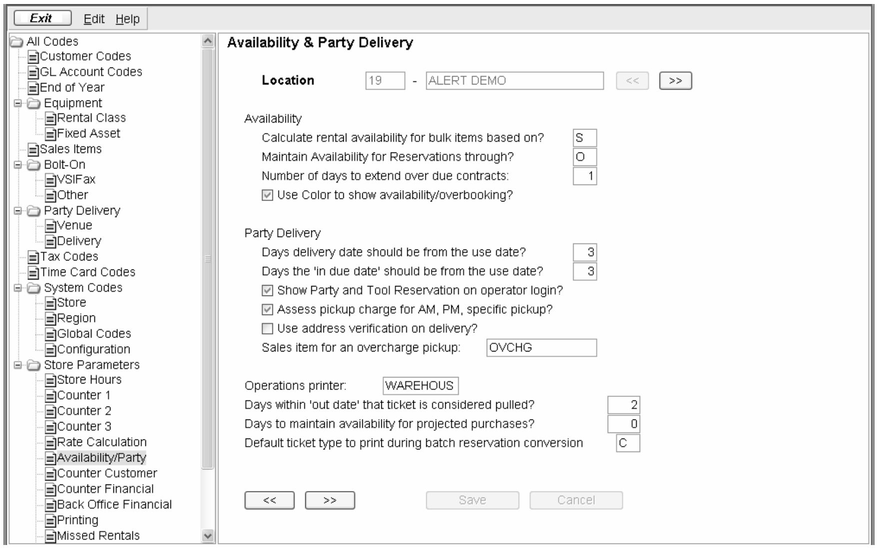
For this store, the actual number of hours that would normally be charged is 48. Because of grace allowances, the customer isn't charged for any time on Friday (because he rented the item one hour prior to the store's closing) and the customer is given a grace allowance on return, so the first hour on Monday is not charged. So, the customer is effectively charged for Saturday and Sunday only.

Using Weekend Rates, you can specify that if a customer would normally be charged for 48 hours, you only want to charge him for 36 hours. To do this, you would enter 48 in the Break Point 1 field and 36 in the Charge for ___ hours field.

Three break points can be set up in this way, using Break Point 1, 2, and 3 and Charge for ___ hours 1, 2, and 3.

Availability/Delivery

The parameters on this page deal with a variety of options, including how availability is calculated for multi-store locations, and delivery parameters.



Field Descriptions

Calculate rental availability for bulk items based on:

Enter **L** if you want availability for bulk items to be based only on the quantity available at the current store location. Enter **S** if you want availability to include items from all store locations system wide.

Maintain availability for reservation through?

If a reservation is not converted to a contract by the expected out date, the system assumes the reservation is incorrect and disregards it when rebuilding availability records at night, enter **Outdate** here if you want the system to continue to calculate availability in this manner. Enter **In Date** to have the system retain these reservations and use their in due date when building availability records.

Number of days to extend overdue contracts:

Enter the number of days an overdue contract should be extended when the system rebuilds availability during the end of day process.

Use Color to show availability/overbooking

Select this option if you would like Alert to color code rental and sales items that are overbooked at the counter.

Days delivery date should be from the use date?

If your store has purchased the **Advanced Delivery** module, when writing a reservation, the system asks for a Use Date before information in the Time box is entered. The system then uses this Use Date to determine the default delivery date. Enter the number of days before the Use Date you want the Default Delivery date to be. For example, if you enter **1** here, and a Use Date of 6/12/08 is entered, the Delivery Date will default to 6/11/08.

Days the 'in due date' should be from the use date?

If your store has purchased the **Advanced Delivery** module, when writing a reservation, the system asks for a Use Date before information in the Time box is entered. The system then uses this Use Date to determine the default In Date. Enter the number of days before the Use Date you want the default In Date to be. For example, if you enter **1** here, and a Use Date of 6/12/08 is entered, the In Date will default to 6/13/08.

Show Party and Tool Reservation on operator login?

If your store uses the **Advanced Delivery** module, when writing a reservation, you are automatically prompted to enter a Use Date instead of being prompted to enter the Out Date (which is how Alert EasyPro normally initiates a reservation). If you would like to be able to write a reservation in both ways, then select this option. A new Toolbar function, **F8TRes** (for Tool Reservation), will appear at the Counter. Clicking **F8TRes** will allow you to write a reservation by entering the Out Date first.

Assess pickup charge for AM, PM, Specific pickup (Y/N)?

The **Advanced Delivery** module includes a Delivery Matrix which is used to schedule and charge different rates for deliveries. If you want to enable the charging of pickups for AM, PM, and Specific Time pickups, then select this option.

Use address verification on delivery?

This feature is only used with the **Advanced Delivery** module. If you select this option, then you will be able to verify a delivery address entered at the counter in Alert EasyPro and then subsequently export the delivery address into Microsoft Streets and Trips routing software.

Sales item for an overcharge pickup

If your store has purchased the **Advanced Delivery** module, when writing a reservation, you are asked if you would like to assess a pickup charge (in addition to a delivery charge). The manufacturer's catalog number of the sales item used for this purpose should be entered in this parameter field.

Operations Printer

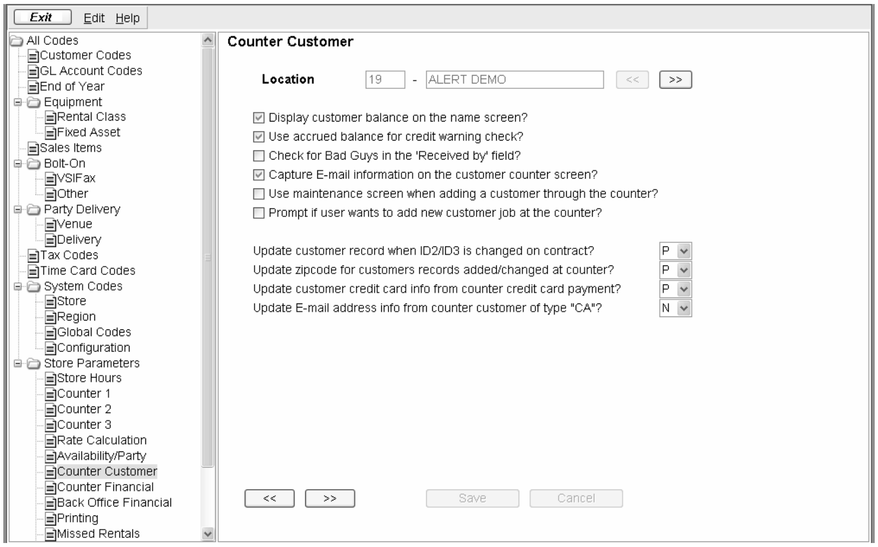
This parameter is only used with the **Advanced Delivery** module. Enter the name of the printer that you would like ticket change notifications printed to. Ticket change notifications will only be printed for tickets that fall within the pull period (see next parameter).

Days within 'out date' that a ticket is considered pulled?

This parameter is only used with **Advanced Delivery**. Enter the number of hours before the out date that a ticket is considered to be pulled (inventory is no longer available). This is a three digit field. Enter a whole number of hours.

Days to maintain availability for projected purchases?

Counter Customer



Field Descriptions

Display customer balance on the name screen?

If you want the current balance for this customer's account to show in the name screen, then select the box.

Use accrued balance for credit warning check?

The accrued balance is the total of all open contracts and the current account balance. Open contracts that have been advanced billed, have special rates, have all rental items checked in or have all rental items set to a fixed rental rate will not be included in the accrued balance. If you enter select this option (by checking the box), then at the counter, when adding a customer to the contract, the accrued balance will appear with other credit information in the lower left hand corner.

Check for Bad Guys in the "Received by" field?

If you want the system to check if the name entered in the Received By field at the counter is a bad guy, then select this option. If not, then leave the option blank.

NOTE: Bad Guy is a Customer Type used to flag customers with bad credit, who stole equipment, refused to pay charges, damaged equipment, etc. When a customer is coded as a Bad Guy, usually a note is entered that describes why the customer was coded as a Bad Guy. This note appears when the customer is selected at the counter and can be viewed in the customer's file.

Capture email information on the customer counter screen?

Select this option if you want to input email information at the counter.

Use maintenance screen when adding a customer through the counter?

When a new customer comes into your store, you have two options for adding his or her information from the Counter screen. If you want to add customer information using the Customer Inquiry screen, then select this option. If you want to simply add the information that is needed on the ticket, then leave this option blank.

TIP: If you do not select this option, you may need to enter additional customer information through **Customer Inquiry** at a later time, especially if you want the customer to be set up as a charge (AR) customer.

Prompt if user wants to add new job at the counter

Flag this field if you would like the Alert system to prompt the counter person to add a new job to the customer main record when the job is added at the counter.

Update main customer record when ID2/ID3 is changed on contract

The ID2 and ID3 fields are custom fields that are used to hold any additional customer information you desire. They are often used to hold the customer's social security number, date of birth, etc.

If you always want the customer's main record to be updated whenever the information in ID2 or ID3 is changed while writing a ticket, enter **A** (for Always). If you never want these fields in the permanent record updated from the counter, enter **N** (for Never). If you want the computer to ask you if you want to update the customer file at the counter, enter **P** (for Prompt).

NOTE: ID1-3 fields establish the description of various forms of customer identification. These descriptions are used at the counter and when accessing customer information through **Customer Inquiry**.

Update Zip Code file for customer's records added/changed at counter

If you would like the Zip Code file to be updated every time a change is made at the counter, enter **A** (for Always). If you would like to be prompted when a change will be made, enter **P** (for Prompt). If you would like the Zip Code file to never be updated from the counter system, enter **N** (for Never).

Update customer credit card information from counter credit card payments

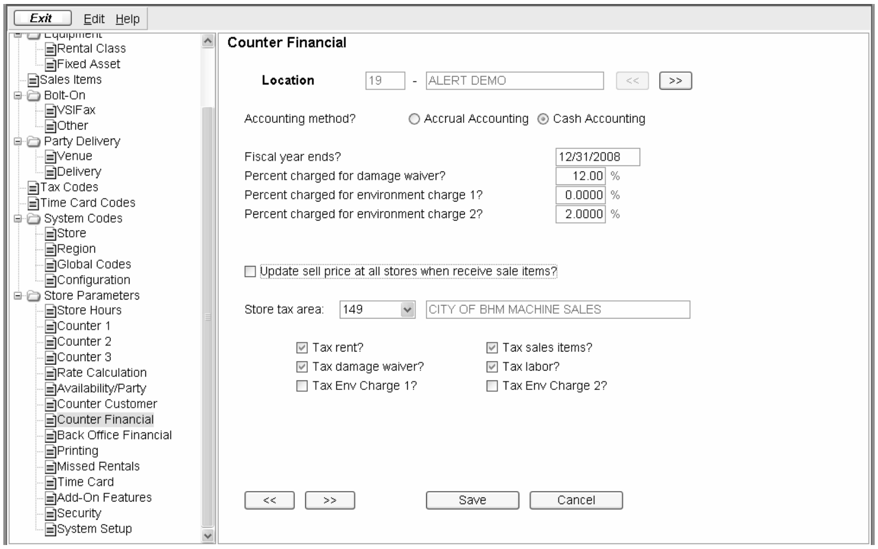
If you would like the customer's credit card information to be updated every time a change is made at the counter, enter **A** (for Always). If you would like to be prompted when a change will be made, enter **P** (for Prompt). If you do not want the customer credit card information updated from the counter system, enter **N** (for Never).

Update e-mail address information from counter customer of type "CA"

If you would like the customer's email address to be updated every time a change is made at the counter, enter **A** (for Always). If you would like to be prompted when a change will be made, enter **P** (for Prompt). If you would like the email address to never be updated from the counter, enter **N** (for Never).

Counter Financial

Counter Financial parameters determine how Alert EasyPro calculates various financial transactions.



Field Descriptions

Accounting Method?

Select the method of accounting that your store uses – Accrual or Cash Accounting.

Fiscal year ends?

Enter the ending date of this fiscal year in the format **MMDDYYYY**.

Percent charged for Damage Waiver?

Enter the percentage of rental dollars on each ticket that you want charged as a damage waiver. This number may include decimals. If you do not use a damage waiver, enter **0.00**.

Percent charged for Environmental charge 1?

Enter the percent to charge for the first environmental charge.

Percent charged for Environmental charge 2?

Enter the percent to charge for the first environmental charge.

Update sell price at all stores when receiving sales items?

Select this option to update the selling price of a sales item for all stores when receiving an item through Sales Receiving. Leave this option blank to only update the price at the current store location.

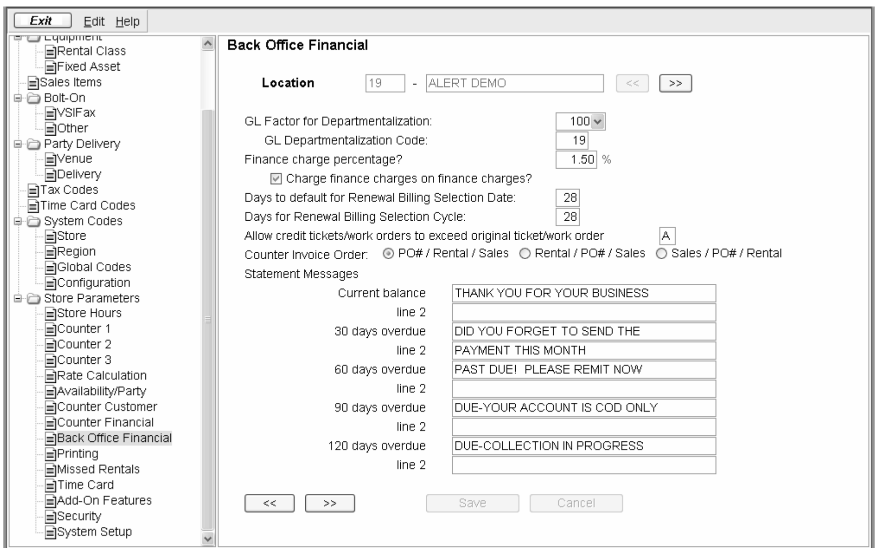
Store tax area?

Enter the tax area that your store is located in, or click the drop-down arrow to view a list of available tax areas.

Taxes

Check the box next to each item that is taxable: rent, sales items, damage waiver, labor, and environmental charges 1 and 2.

Back Office Financial



Field Descriptions

GL Factor for departmentalization

This field informs the computer of how many digits your departmental coding system is. If the code you entered in the first field is one digit, enter **10** here. If it is two digits, enter **100** here. Or, if the code is three digits, enter **1000**.

GL Departmentalization Code

NOTE: This parameter is used for multi-store locations only. Single-store operations should enter **1** in the GL Departmentalization Code field and **0** in the GL Factor for Departmentalization field.

If you are a multi-store location, enter the department code for this store location. A department code should be assigned to each location so that earnings to General Ledger accounts can be separated according to store. The departmentalization code is limited to three digits and must be numeric (no letters are allowed). Examples of department codes include: 01, 02, 001. The department code serves as an identification flag for each branch location when running General Ledger accounts. By setting up department codes for each location, you will be able to tell how much was earned by each store in each GL account.

Finance charge is calculated at what percent?

Enter the percentage at which you want finance charges calculated.

Do you charge finance charges on finance charges?

Select this option if you assess a finance charge on outstanding finance charges.

Days to default for Renewal Billing Selection Date

This parameter controls two issues. First, it controls what Selection Date is used for including contracts for renewal billing. The system uses the transaction date (entered when you begin the renewal billing process) and counts back the number of days entered in this field to determine the renewal billing Selection Date.

Secondly, the value in this field is used as the length of time to bill on the renewal billing ticket (and thus determines the Bill Through date). If the time charged is less than 28 days, the customer may not receive the lowest possible effective rate (i.e. the 4 week rental rate).

Also, if this parameter is set so that the customer is charged a full month in less than 28 days (because of Pro-ration), the customer may end up paying too much. For these reasons, you should probably enter 28 in this parameter.

NOTE: If you select the Advanced Billing option, this parameter determines how many days in advance to bill a contract. For more information, see the **Customer Manual**.

Days for Renewal Billing Selection Cycle

This parameter determines how soon after a contract has been renewal billed it can be renewal billed again. If this parameter is set to 0 (zero), only contracts which have not been billed since the number of days in the Selection Date will be included in the renewal billing list. However, if a number greater than zero is entered in this parameter, contracts can be renewal billed again sooner than the selection date.

Since the purpose of renewal billing is to accelerate cash flow, you will probably want to enter **0** (zero) in this parameter.

Allow credit tickets/work orders to exceed original ticket/work order

This parameter determines whether or not your store allows credit amounts for contracts or work orders to exceed the original contract or work order amount. Select **Always** if it is OK for credit amounts to exceed original ticket amounts. Select **Prompt** if you want to evaluate the situation on a case by case basis. Or select or **Never** if you do not want credit tickets to ever exceed the original ticket amount.

Counter Invoice Order

These fields list different orders for items to appear on invoices from your store. You can choose whether rental items, sales items, or purchase orders appear first on the invoice description line. Select the option that has the order you prefer.

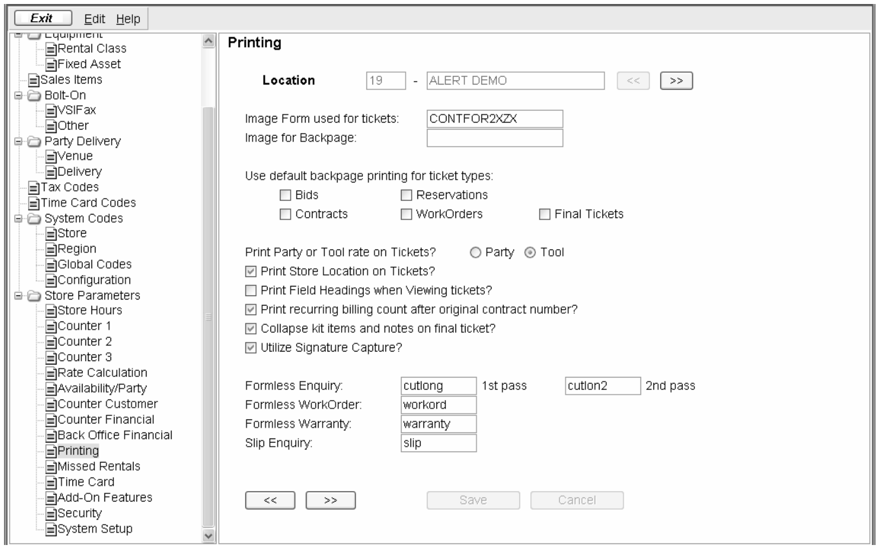
Statement Messages

These fields allow you to create standardized messages that will print on statements that are current, 30 days overdue, 60 days overdue, 90 days overdue and 120 days overdue. When running statements, the system will select the appropriate message based on the past due amount.

For each statement message, enter the first 30 characters on the first line. Then press **ENTER** and finish typing the message on the second line.

Printing

Printing parameters include information for Formless Printing, contract printing customization, and kit tickets.



Field Descriptions

Image Form used for tickets

This field tells Alert which form to pull when using formless printing. It is pre-set by your Alert installer and should not be changed.

Image for Backpage:

This field tells Alert which image to use for the back page of your contracts when using formless printing. This page prints the legal information for your rental contract on a separate page from the actual contract. An Alert installer will set this parameter and it should not be changed.

Use default backpage printing for ticket types:

Place a checkmark next to each ticket type that will use the default back page when using formless printing.

Print Party or Tool rate on Tickets?

This parameter determines what set of rates are printed on every rental line item on the ticket. Party rates are the Daily, Weekly and 4 week rates. A selection of Tool rates will print the entire rate table.

Print Store Location on Tickets?

Select this option if you want the store location to print on each ticket.

Print Field Headings when Viewing Tickets?

If you select this option, then all the field headings for the contract will be visible when the contract is printed to screen.

Print recurring billing count after original contract number?

If you select this option, then a number signifying the number of times a contract has been cycle billed will print after the contract number.

Collapse kit items and notes on final ticket?

You can choose to have only the kit header records appear on final tickets (versus having each component of the kit appear on the ticket). This parameter also controls whether or not notes are printed on the final ticket. If you want to collapse kit items and notes, check this option.

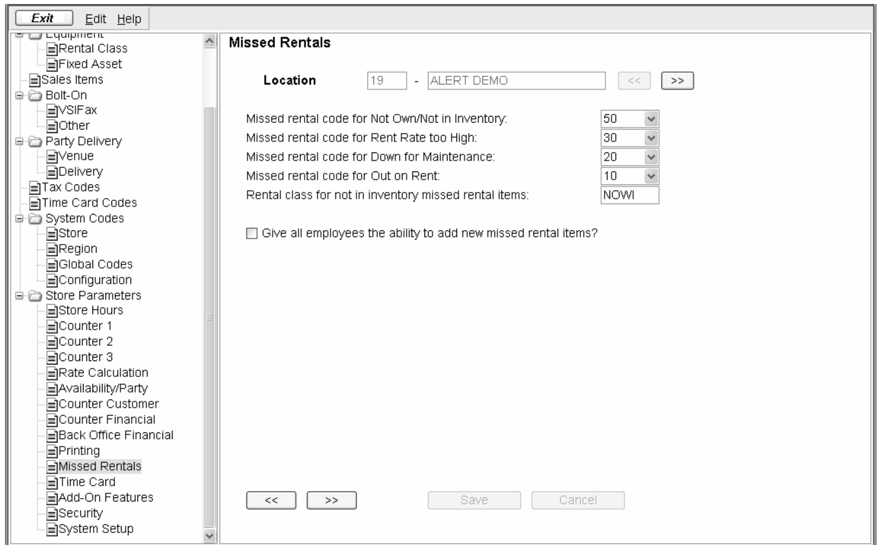
Use Signature Capture?

Check the box if you will be using Signature Capture.

Note: The remaining parameters on this page refer to Formless Printing and should not be changed without consulting the Alert Help Desk.

Missed Rentals

Missed rental codes can be entered in the following four fields so that you can use Toolbar functions to easily code missed rental opportunities. Some of these functions appear during the rental equipment selection process; others only appear on the Missed Rentals input screen. Missed Rental codes are setup in on the Missed Rental Menu. The Missed Rental menu can be found on the main menu under File Maintenance and then Rental File Maintenance.



Field Descriptions

Enter missed rental code for Not Own/Not in Inventory

Enter the two-digit code set up in Missed Rental Codes that corresponds to this description.

Enter missed rental code for Rent Rate too High

Enter the two-digit code set up in Missed Rental Codes that corresponds to this description.

Enter missed rental code for Down for Maintenance

Enter the two-digit code set up in Missed Rental Codes that corresponds to this description.

Enter missed rental code for Out on Rent

Enter the two-digit code set up in Missed Rental Codes that corresponds to this description.

Enter the rental class for not in inventory missed rental items

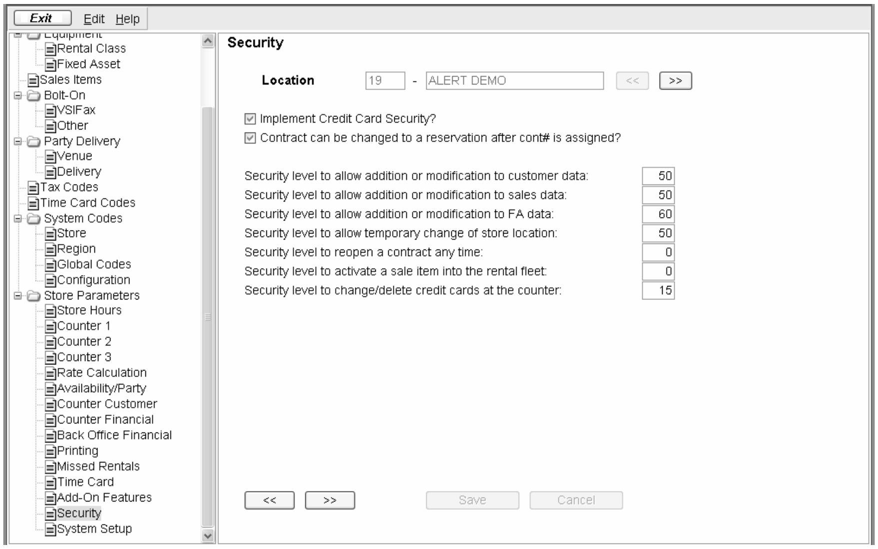
This parameter can be used to set up a "phantom" Rental Class record so that missed rental entries do not appear in your equipment listing when selecting equipment for rent. We suggest you use the four-character code **NOWN**.

Give all employees the ability to add missed rental item names?

Select this option if you want to allow all employees to add missed rental item names. Otherwise only managers will have this capability.

Security

The parameters on page ten determine which staff members are allowed to modify customer, sales, and store location data.



Field Descriptions

Implement credit card security?

Selecting this option will mask the credit card numbers in all areas of Alert (contract payment screen, customer credit card file, and on printed contract). Leave this option unchecked to keep the credit card numbers visible.

Contract can be changed to reservation after cont # has been assigned?

Select this option if you would like to have the ability to change a contract back to a reservation after a contract number has already been assigned. Leave this option unchecked if you do not want contracts changed back to reservations after a contract number has been assigned.

NOTE: Contract numbers are assigned when the ticket has been saved with a status of Contract.

Security level to allow addition or modification to customer data

A security level of 60 in this field will only allow those logged on as managers to edit customer information. If you want counter staff to be able to change this information, enter a security level of 50.

Security level to allow addition or modification to sales data

A security level of 60 in this field will only allow those logged on as managers to add or modify sales data. If you want counter staff to be able to change this information, enter a security level of 50.

Security level to allow addition or modification to FA data

A security level of 60 in this field will only allow those logged on as managers to add or modify fixed asset data. If you want counter staff to be able to change this information, enter a security level of 50.

Security level to allow temporary change of store location

A security level of 60 in this field will only allow those logged on as managers to temporarily change store location. If you want counter staff to be able to change this information, enter a security level of 50.

Security level to reopen a contract any time

A security level of 60 in this field will only allow those logged on as managers to reopen a ticket past the first day. If you want counter staff to be able to reopen tickets after the first day, enter a security level of 50.

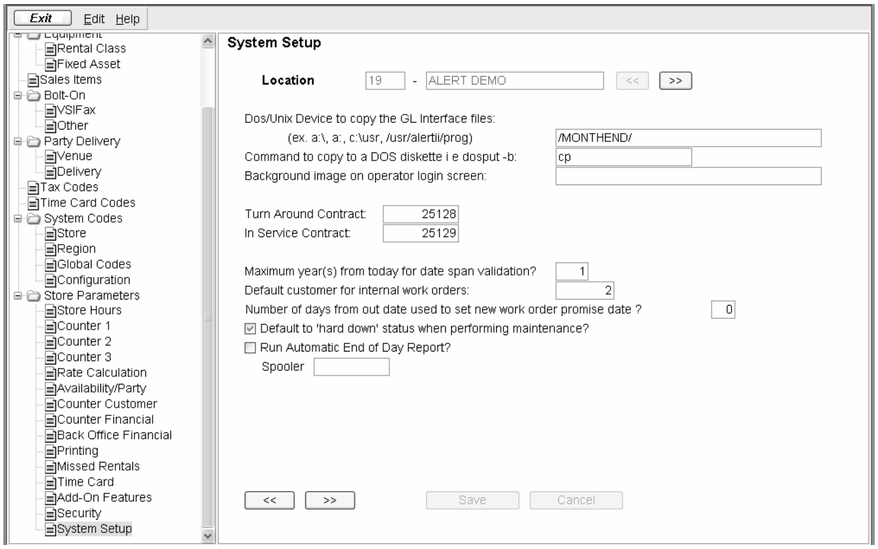
Security level to activate a sale item into the rental fleet

A security level of 60 in this field will only allow those logged on as managers to transfer a sales item to the rental fleet. If you want counter staff to be able to change this information, enter a security level of 50.

Security level to change/delete credit cards at the counter:

A security level of 60 in this field will only allow those logged on as managers to change or delete credit cards at the counter. If you want counter staff to be able to change this information, enter a security level of 50.

System Setup



Field Descriptions

System Related Parameters

NOTE: These fields are set up by Alert before you receive your system and should not be altered by anyone other than Alert staff.

Maximum number of year(s) from today for date span validation

This parameter determines how far in the future you can enter valid dates into the system. For example, if this parameter is set to **1**, then any time a date greater than 1 year from now is entered (i.e. in the Time box or on reports), the computer will not accept the date.

Run automatic End of Day reports

Enter **Y** if you would like the Exception Report and the Overdue Contracts Report to automatically print as part of the end of day process. If you enter **Y**, then also enter in the "spooler" area, the name of the printer that you want the reports printed to. Otherwise enter **N**.

Note: The remainder of the parameters listed on this page applies only to the Work Order module. Please see the Work Order manual for additional information.

End of Year Procedures

Contents

Procedures to be done on the last day of the year

The following procedures should be completed at the close of business on the last day of the year in addition to any regular monthly procedures at your store such as statements, bank reconciliations, etc. If a procedure is critical to run on the last day of the year after close of business then it will be marked with a C (critical) otherwise it will be marked with an O (optional). All optional procedures are recommended by Alert.

IMPORTANT: If you are running PeachTree, please request our PeachTree End of Year Document or choose document #20138 from our website at www.alert-ims.com.

Procedure	Menu	C/O	Done
Print Contracts Due to be Closed. Close and bill all contracts that are completely checked in.	Counter Reports	**C**	
Print Aging for end of year AR balance.	Customer Reports	**C**	
Print Stock Evaluation Report for the total value of sales items.	Sales Reports	**C**	
Print Open Deposits Report for the total value of open customer deposits.	Counter Financial Reports	**C**	

Print Fixed Asset Valuation Report for the total value of rental items.	Fixed Asset Reports	**C**	
Run COGS Analysis if you are running the Advanced Parts and Sales module.	Sales Reports	**C**	
Print Open Tickets Report for Contracts, Reservations and bids for a counter audit.	Counter Reports	**O**	

Procedures to be done the first month of the New Year

The following procedures should be completed during the first month of the New Year. If a procedure is critical then it will be marked with a C (critical) otherwise it will be marked with an O (optional). All optional processes are recommended by Alert.

Procedure	**Menu**	**C/O**	**Done**
Adjust customer and fixed asset year-to-date totals.	Codes and Setup – End of Year Menu	**C**	
Update the Holidays list.	Codes and Setup	**C**	
Update your fiscal year end date.	Store Parameters	**C**	
Clear out year end depreciation – only if you are running the Depreciation Module.	Fixed Asset Menu	**C**	
Test uninterruptible power supply.	N/A	**C**	
Rental Earnings Report, for earnings analysis	Rental Reports	**O**	
Fixed Asset Earnings Reports	Fixed Asset Earnings Menu	**O**	
Return on Investment Report	FA ROI Reports	**O**	
Sales Analysis Reports	Sales Items Earnings Menu	**O**	
Fixed Asset Short List or Fixed Asset Valuation Report for end of year inventory	Fixed Assets Reports	**O**	
Sales Item Short List or Stock Evaluation report for inventory	Sales Reports	**O**	

The following procedures should also be completed during the first month of the New Year for general system and inventory maintenance. All procedures are optional but will help maintain optimum system performance.

Procedure	**Menu**	**C/O**	**Done**
Run Fixed Assets Sold Report for accounting purposes.	Fixed Asset Reports	**O**	
Update the names of sold assets by placing three ~ in front of the name.	Fixed Asset File Maintenance	**O**	
Update inactive customers by changing their account status to inactive or closed and placing three ~ in front of their names.	Customer File Maintenance	**O**	
Write off bad debt and change those customers to a customer type of BG for bad guy.	Customer File Maintenance	**O**	
Update sales inventory by adding three ~ to and sales items that you no longer offer.	Sales File Maintenance	**O**	
Adjust sales item pricing if necessary	Sales File Maintenance	**O**	
Adjust rental rates as necessary	Rate Increase Menu	**O**	

Index

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V

W