

Processing Rentals in the Front Office

Customer Services

Sparkstone Technology Ltd



Introduction

This document outlines the workflow for processing rentals within the Sparkstone Retail EPOS System. These notes are designed to complement the training that you will have received on the Sparkstone Retail EPOS from a Sparkstone training consultant or system administrator. They are not intended to be a complete overview of the software but are designed to assist you at a later stage when you are away from the training session.

These notes have been compiled to reflect the configuration of the Sparkstone EPOS system at your site and as such may only contain information pertinent to the operations that you require. If additional modules are purchased at a later date, training notes will be provided as appropriate on completion of the associated training course.

Objectives

To provide an overview of the processes involved in creating rentals.

Conventions Used

Menu paths will be indicated throughout this training manual in bold.

For example:

Back Office | Product file | Stock Records

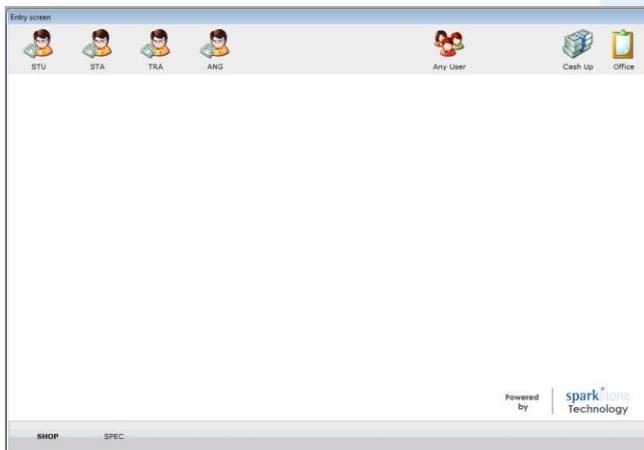
Indicates that you should access Stock Records window from the Back Office using the Product File on the drop down navigation menu.

Keying in Short Term Rentals

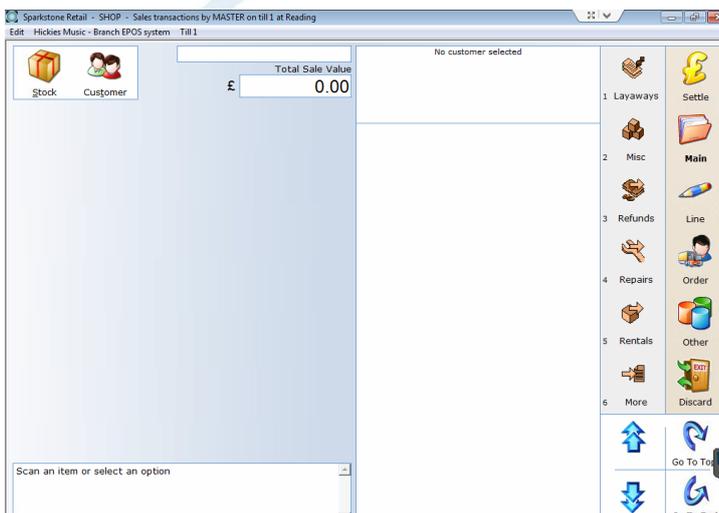
When opening Sparkstone, you will be greeted by the splash screen:



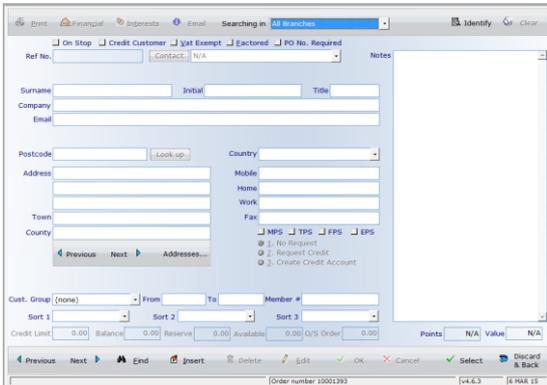
Click the screen using a mouse or the touch screen and the following login screen will be displayed:



Either select the icon that corresponds to you on the top left hand side or click 'Any user' and this will list all users. Select the required user and press 'OK'. The tilling screen will then be displayed:

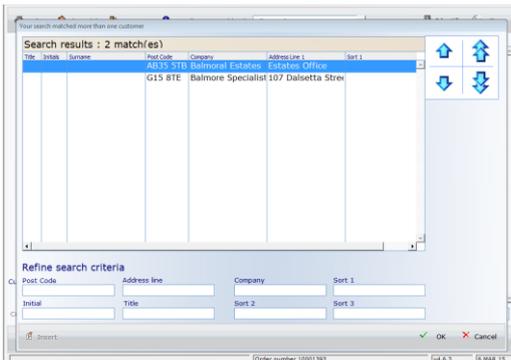


Select 'Rentals', then select 'Rentals Short Term' and it will prompt for a customer to be added:

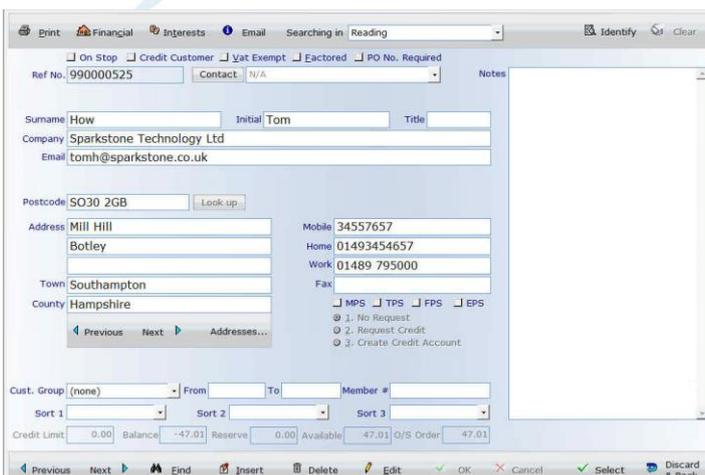


If the customer is an account customer they will most likely already have been entered into the system. To search for them click 'Find' and type in either their company name or postcode.

If there is more than one record with the same name or postcode then a window will be displayed titled 'your search matched more than one customer'. Select the relevant one from the list and click 'OK':

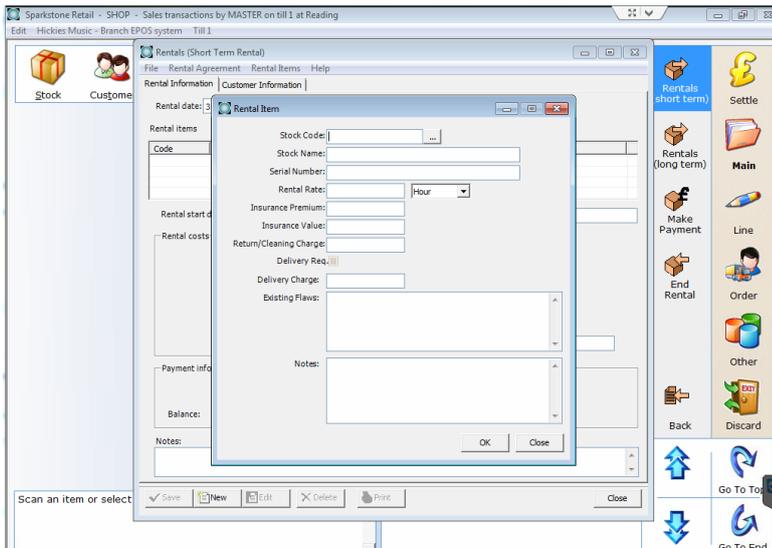


The rest of the customer details will then show in the customer record screen:

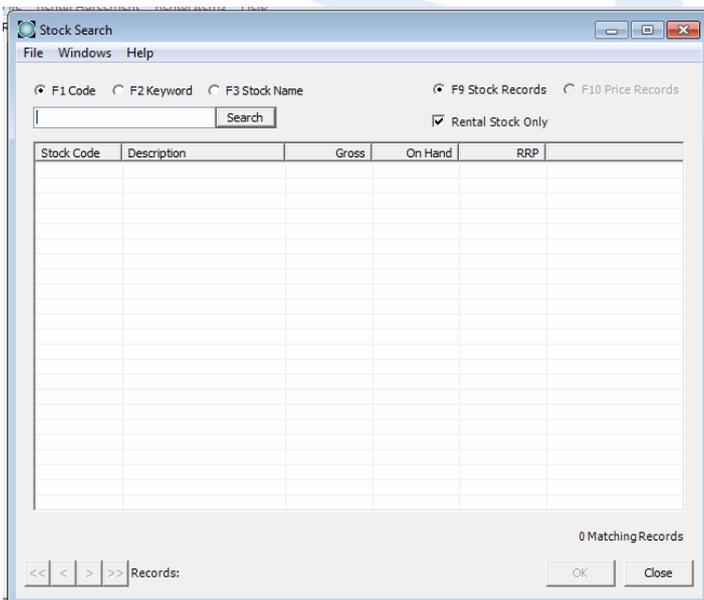


Press 'Select' and the customer will appear at the top of the tilling screen.

Going into Short Term Rentals will open the following window:



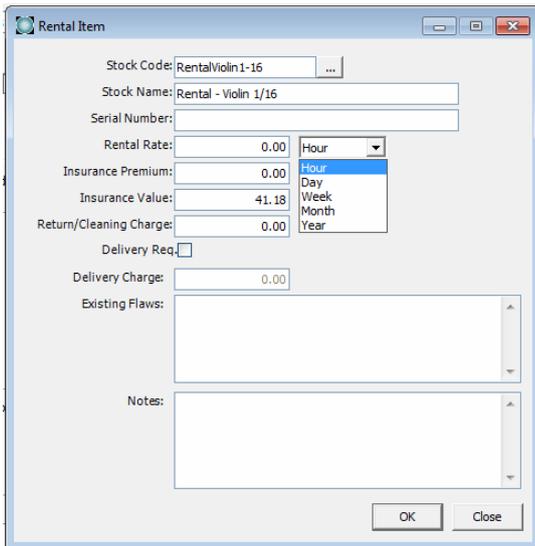
Firstly, enter a stock code- if the exact stock code is not known click on the '...' button and another window will appear to type in further information:



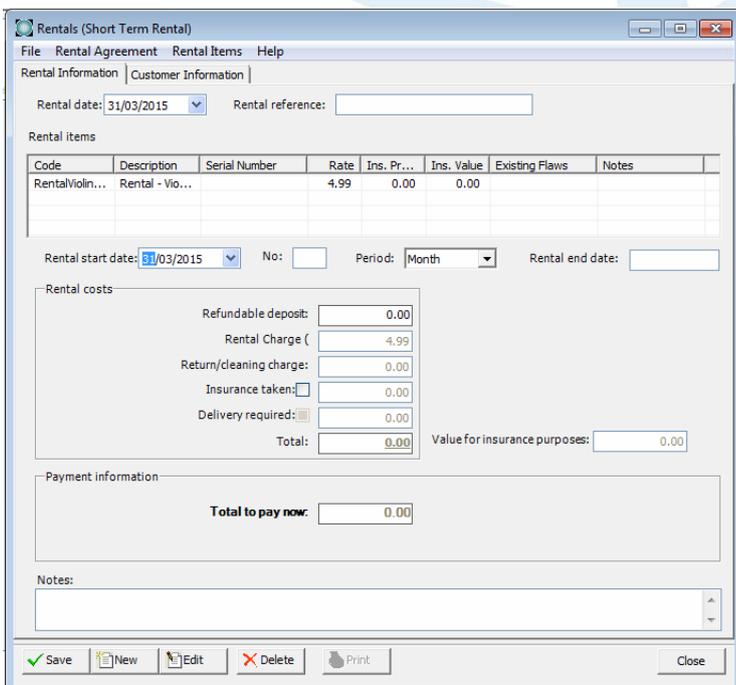
The box 'Rental stock only' can be unticked and it is possible to search for all items.

Once the item has been selected, the serial number and the rental rate can be configured.

The drop down can be changed to show other fields- like 'Day', 'Week' and 'Month':

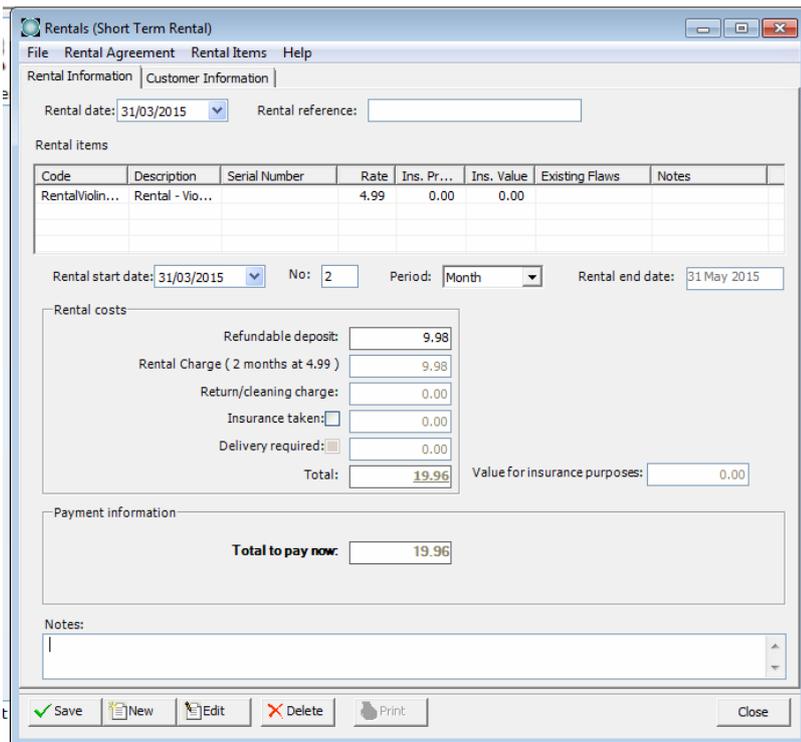


Enter the desired rental rate, tab through and key in any flaws or additional notes as required then press 'OK'. The details that have been previously entered will show at the top line:



Code	Description	Serial Number	Rate	Ins. Pr...	Ins. Value	Existing Flaws	Notes
RentalViolin...	Rental - Vio...		4.99	0.00	0.00		

Define the rental start date and the number of periods. Tab through and this will define the rental end date. Then tab through to the refundable deposit and enter in the value for this. The total to pay now will be specified and at this point any additional notes can be added at the bottom of the page:



Rentals (Short Term Rental)

File Rental Agreement Rental Items Help

Rental Information | Customer Information

Rental date: 31/03/2015 Rental reference: []

Code	Description	Serial Number	Rate	Ins. Pr...	Ins. Value	Existing Flaws	Notes
RentalViolin...	Rental - Vio...		4.99	0.00	0.00		

Rental start date: 31/03/2015 No: 2 Period: Month Rental end date: 31 May 2015

Rental costs:

Refundable deposit: 9.98

Rental Charge (2 months at 4.99) 9.98

Return/cleaning charge: 0.00

Insurance taken: 0.00

Delivery required: 0.00

Total: 19.96 Value for insurance purposes: 0.00

Payment information:

Total to pay now: 19.96

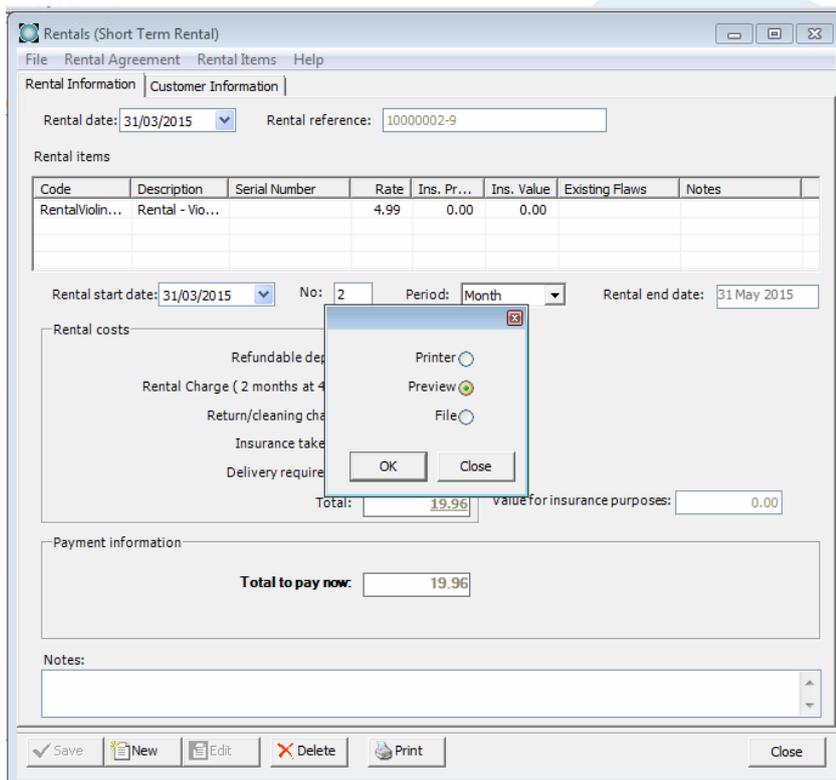
Notes:

[]

Save New Edit Delete Print Close

At this point the rental can be saved, then this window can be closed.

Then it is possible to print the rental agreement by going to 'Print' and the following window will be displayed:



Rentals (Short Term Rental)

File Rental Agreement Rental Items Help

Rental Information | Customer Information

Rental date: 31/03/2015 Rental reference: 10000002-9

Code	Description	Serial Number	Rate	Ins. Pr...	Ins. Value	Existing Flaws	Notes
RentalViolin...	Rental - Vio...		4.99	0.00	0.00		

Rental start date: 31/03/2015 No: 2 Period: Month Rental end date: 31 May 2015

Rental costs:

Refundable dep: []

Rental Charge (2 months at 4 []) []

Return/cleaning cha []

Insurance take []

Delivery require []

Total: 19.96 value for insurance purposes: 0.00

Payment information:

Total to pay now: 19.96

Notes:

[]

Save New Edit Delete Print Close

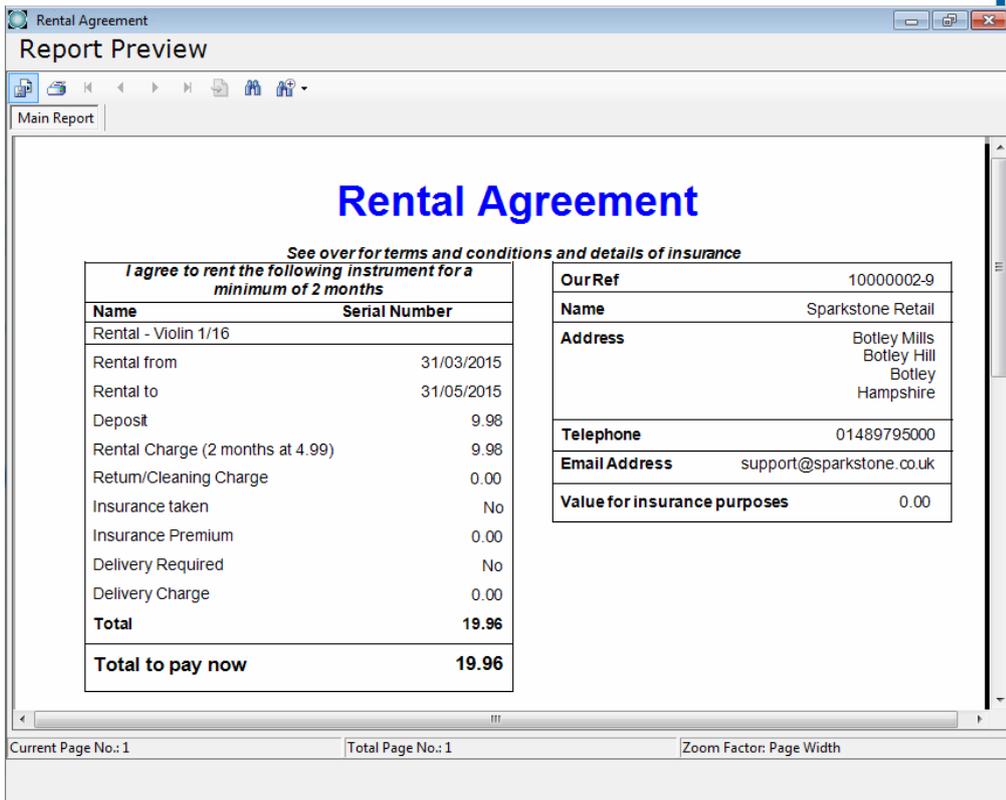
Printer

Preview

File

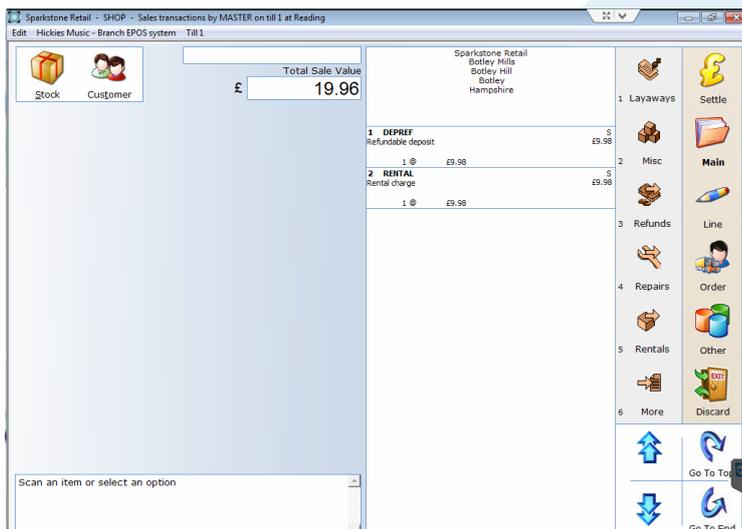
OK Close

Press 'OK' and a preview of the report will print:



The rental agreement can be sent directly to the printer if desired.

The items will then be listed in the sales window:



At this point the deposit and the rental charge can be settled. Go to 'Settle' and choose the settlement option.

If you then go into the customer record window and go to Financials, the following window will be displayed:

Financial details for Test

Order Number	Order Date	Inv/Crn Number	Inv/Crn Date	User	Ttl	Order Value	Status	Customer Ref	Notes
10001973	31 MAR 15	25	31 MAR 15	MASTER	1	14.97	INVOICED		
10001959	31 MAR 15	25	31 MAR 15	MASTER	1	14.97	INVOICED		
10001945	30 MAR 15	24	30 MAR 15	MASTER	1	0.01	INVOICED		
10001942	30 MAR 15	23	30 MAR 15	MASTER	1	0.01	INVOICED		
10001940	30 MAR 15	22	30 MAR 15	MASTER	1	0.01	INVOICED		
10001935	30 MAR 15	21	30 MAR 15	MASTER	1	4.99	INVOICED		
10001932	30 MAR 15	20	30 MAR 15	MASTER	1	14.97	INVOICED		
10001930	30 MAR 15	19	30 MAR 15	MASTER	1	9.98	INVOICED		
10001929	30 MAR 15	18	30 MAR 15	MASTER	1	-9.98	INVOICED		
10001928	30 MAR 15	17	30 MAR 15	MASTER	1	14.97	INVOICED		
10001927	30 MAR 15	16	30 MAR 15	MASTER	1	-9.98	INVOICED		
10001925	30 MAR 15	15	30 MAR 15	MASTER	1	14.97	INVOICED		

Mrs C Test 74.87

View details Settlement Details Deposits Order Notes Extra Order Information Rentals Delivery Address Invoice Address Job Search Refund Excess Payments

Type	Details	Qty	Stock Code	Gross	Discount	Post Disc.	Status	Serial Number
				0.00	0.00	0.00		

Invoice Delivery Note Order Conf. Extra Detail Information Repair Item Cancel Sale Refund Sale Settle Order Back

Click on 'Rentals' and the following window will be displayed:

Rentals Management

Print

Rental #	Stock Code	Serial Number	Installment	Date Payable	Installments Paid	Installments Left	Outstanding	Arrears	Expiry Date	Short/Long Term
8	m104		0.00	(none)	0	0	0.00	0.00	31 MAR 15	Short
7	m104		0.00	(none)	0	0	0.00	0.00	31 MAR 15	Short
9	RentalViolin1-16		0.00	(none)	0	1	0.00	0.00	31 MAY 15	Short
5	m104		0.00	(none)	0	0	0.00	0.00	31 MAR 15	Short
4	900597	900597	4.99	1st	0	2	9.98	0.00	30 JUN 15	Long
6	m104		0.00	(none)	0	0	0.00	0.00	30 APR 15	Short
3			0.00	(none)	0	0	0.00	0.00	30 MAR 15	Long

Active Inactive All

Due Date	Amount	Paid	Paid Date	Invoiced	Invoiced Date	Invoice Number

Unpaid Paid All

Reprint Agreement Pay Charge Post Invoice Back

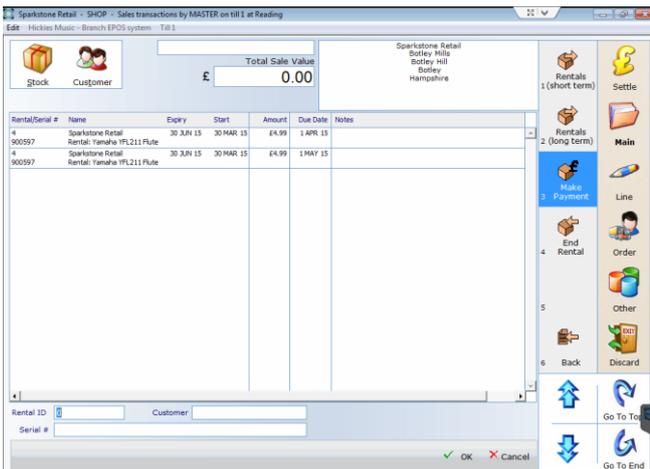
- 1 Rentals (short term)
- 2 Rentals (long term)
- 3 Make Payment
- 4 End Rental
- 5
- 6 Back

If the rental existed for longer, it would be possible to select the line and to pay the rental from here by selecting 'Pay charge'. Also, the invoice can be sent to the customer by going to 'Post Invoice'.

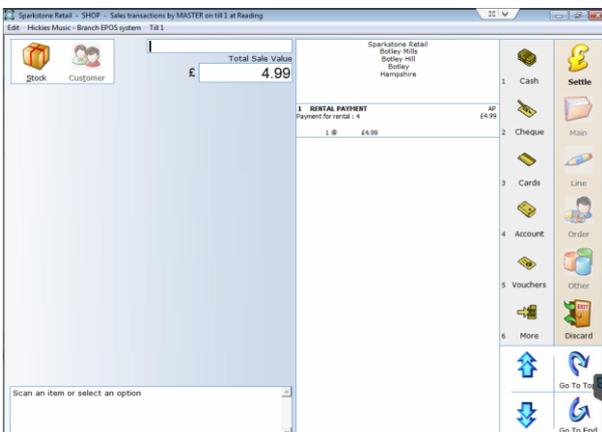
It is the same process for long term rentals- except clicking 'Rentals long term' at the beginning.

The other options on the menu are 'Make Payment' and 'End Rental'.

By selecting 'Make Payment' the rentals that require payment will be displayed. If you have the customer selected, this will filter the results according to the customer:

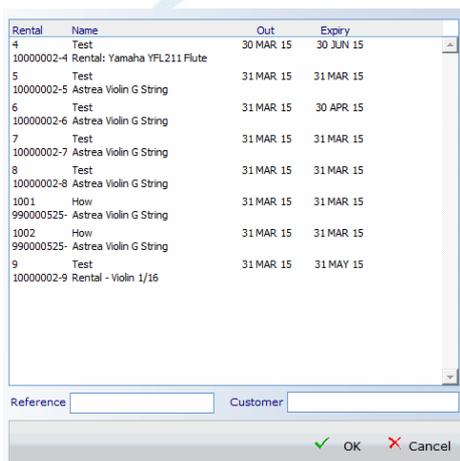


Select a line and press 'OK' and it the sale will be listed in the sales window:

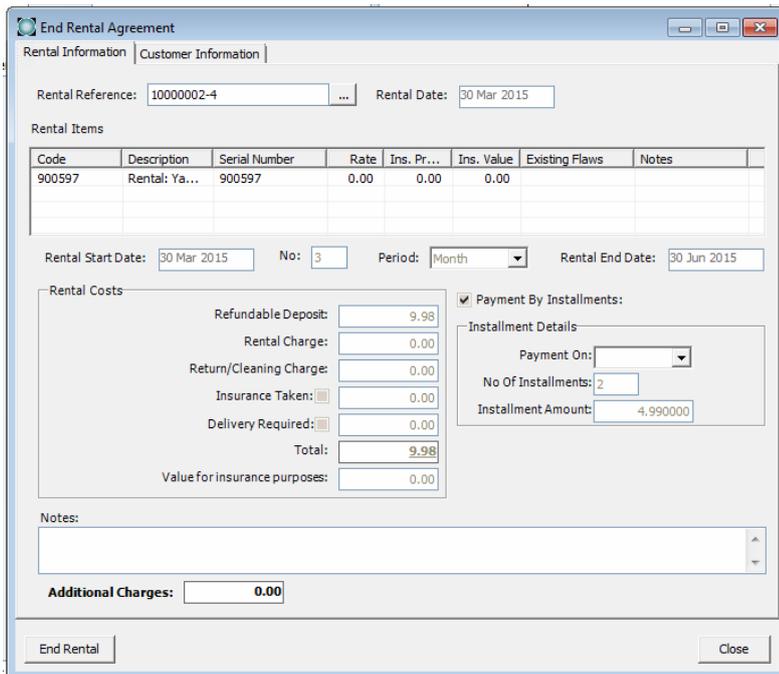


The rental can then be settled.

The rental can be ended by selecting 'End Rental' and the window will be show the list of active rentals:



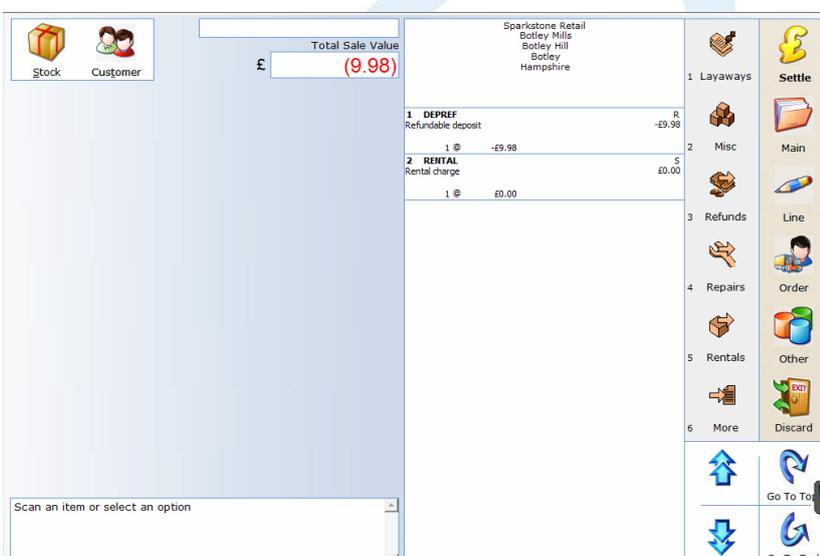
Select the rental that you wish to end and then an additional charges window will pop up, in case there are any damages to the item or the item needs to be replaced:



Add any additional charges to the field at the bottom of the window and select 'end rental'.

If there are no additional charges, it will prompt saying 'there are no additional charges are you sure?'. Select Yes/No to this message.

The items will be listed in the tilling menu:



Click 'Settle' then select the settlement option.