

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:

Sparkstone Retail - SHOP - Sales transactio	ns by MASTER on till 1 at Reading			- 6 X
Edit Hickies Music - Branch EPOS system Till	1			
Stock Customer	Total Sale Value £ 0.00	No customer selected	2 Layaways	Settle
			\$	
			2 Misc	Main
			3 Refunds	Line
			4 Repairs	Order
			5 Rentals	Other
			->=	
			6 More	Discard
Scan an item or select an option	*		- -	GO TO TO
			V	Go To End

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

	Contract N/A	opt 12 Contors		Natas			
Ker NO.	-contact N/A		<u> </u>	Notes			-
Surname	Initial		Title				
Company							
Email							
Postcode	Look up	Country		-			
Address		Mobile					
Address		Home					
		Work		_			
Terre		Far					
Cushi		r at	And True True	Looc			
County		0	1. No Request	I EPS			
Previo	ous Next 🎙 Addresses	0	2. Request Credit				
		0	3. Create Credit Account				
st. Group (none)	From	ro	Member #				
Sort 1	Sort 2	•	Sort 3	-			-
redit Limit 0.00	Balance 0.00 Reserve	0.00 Available	0.00 O/S Order	0.00	Points	N/A Valu	N/A
Previous Next	: 🅨 🏘 Eind 🖉 Insert	🔋 Delete	/ Edit 🗸	ж 🗙 (Cancel 🗸	Select	Discard & Back
			Order sumber 10001393			Jul 4 3	6 MAD 15

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':

	Sumarie	Post Code	Company	Address Line 1	Sort 1	1	¥¥	*
		AB35 5TE	Balmoral Estates	Estates Office		<u>^</u>	-	
		G15 8TE	Balmore Specialis	t 107 Daisetta Stre	м	•	- 😽	
- L			1			-		
ofine c	arch criteria							
		Address line	Company	/ So	rt 1			
ost Code								
ost Code								

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

Ref No.	99000525	Contac	N/A	-			Notes	-
101 1101	330000323							_
Sumame	How	_	Initial Tom			Title		
Company	Sparkstone Techn	ology Ltd				- Contraction		
Email	tomh@sparkstone	e.co.uk						
ostcode	SO30 2GB	Look u	P					
Address	Mill Hill	0	-	Mobile	34557657			
	Botley			Home	014934546	57		
				Work	01489 795	000		
Town	Southampton			Fax				
County	Hampshire					S 🔄 FPS 🗖	J EPS	
					9 1. No Reque	ist		
	Previous Next	P Addre	esses		3 3. Create G	redit Account		
t. Group	(none)	From	То		Member #			
Sort 1	•	Sort 2		•	Sort 3		•	4

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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:

F1 Code	C F2 Keyword C F3 Stock Na	ime	F9	Stock Records	C F10 Price Records	
	Search		🔽 Re	ntal Stock Only		
ock Code	Description	Gross	On Hand	RRP		
					0 Matehia Dascala	
					v Matching Records	

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':

💟 Rental Item			-	• 💌	
Stock Code:	RentalViolin 1-16				
Stock Name:	Rental - Violin 1/16]	
Serial Number:]	
Rental Rate:	0.00	Hour	•		
Insurance Premium:	0.00	Hour Day			
Insurance Value:	41.18	Week			
Return/Cleaning Charge:	0.00	Year			
Delivery Req	· 🗖				
Delivery Charge:	0.00				
Existing Flaws:				*	
				_	
Mater					
NOTES:				*	
				-	
			ОК	Close	

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:

(Seconda)							
🔘 Rentals (Sho	rt Term Rental)						
File Rental Ag	greement Ren	ital Items Help					
Rental Information	on Customer In	formation					
Rental date:	31/03/2015	 Rental refere 	nce:				
Dankel ikewa							
Rental Items			,				
Code	Description	Serial Number	Rate	Ins. Pr	Ins. Value	Existing Flaws	Notes
RentalViolin	Rental - Vio		4.99	0.00	0.00		
I				_			
Rental start	date: 31/03/201	15 💙 No:		Period: Mo	nth 🔄	 Rental end 	date:
-Rental cost	s						
		Refundable deposi	t:	0.00			
		Rental Charge	(4 99			
	Re	turn/cleaning charge		0.00			
		Insurance taken:		0.00			
		Delivery service d		0.00			
		Delivery required:		0.00			
		Tota	·	0.00	Valueforii	nsurance purposes	.0.00
-Payment inf	formation						
		l otal to pay now	<i>.</i>	0.00			
Notes:							
							-
🗸 Save 🎽	New EE	dit 🔀 Delete	Pr	int			Close

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:



File Rental Agreement Rental Items Help Rental Information Customer Information Rental Information Rental date: 31/03/2015 Rental reference: Rental items Code Description Serial Number Rate Ins. Pr Ins. Value Existing Flaws Notes Rental Violin Rental - Vio 4.99 0.00 0.00 Rental items Rental start date: 31/03/2015 No: 2 Period: Month Rental end date: 31 May 2015
Rental Information Customer Information Rental date: 31/03/2015 Rental reference: Rental items Code Description Serial Number Rate Ins. Pr Ins. Value Existing Flaws Notes RentalViolin Rental - Vio 4.99 0.00 0.00 Ins. Value Existing Flaws Notes Rental start date: 31/03/2015 No: 2 Period: Month Rental end date: 31 May 2015
Rental date: 31/03/2015 Rental reference: Rental items Code Description Serial Number Rate Ins. Pr Ins. Value Existing Flaws Notes RentalViolin Rental - Vio 4.99 0.00 0.00 Ins. Pr Ins. Value Existing Flaws Notes RentalViolin Rental - Vio 4.99 0.00 0.00 Ins. Value Existing Flaws Notes Rental start date: 31/03/2015 No: 2 Period: Month Rental end date: 31 May 2015
Code Description Serial Number Rate Ins. Pr Ins. Value Existing Flaws Notes RentalViolin Rental - Vio 4.99 0.00 0.00 0.00 Rental start date: 31/03/2015 No: 2 Period: Month Rental end date: 31 May 2015
Coole Decorption Decorption Rental/Violin Rental - Vio 4.99 0.00 0.00 Rental start date: 31/03/2015 No: 2 Period: Month Rental costs
Rental start date: 31/03/2015 V No: 2 Period: Month V Rental end date: 31 May 2015
Rental start date: 31/03/2015 V No: 2 Period: Month V Rental end date: 31 May 2015
Rental start date: 31/03/2015 V No: 2 Period: Month V 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:
Total: 19.96 Value for insurance purposes: 0.00
Payment information
Total to pay new 19.96
Notes:
Save

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:

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 der Printer Preview @ File File File 0.00 Delivery require OK Close 0.00 0.00 0.00	tental items Code	Description	Serial Number	Rate	Ins. Pr	Ins. Value	Existing Flaws	Notes
Rental start date: 31/03/2015 No: 2 Period: Month Rental costs Refundable de Rental Charge (2 months at 4 Return/cleaning cha Insurance take Delivery require OK Close Total: 19.96 Value for insurance purposes: 0.00 Payment information	RentalViolin	Rental - Vio		4.99	0.00	0.00		
Rental Charge (2 months at a Return/cleaning cha Insurance take Delivery require Total: 19.96 Value for insurance purposes: 0.00	Rental start	date: 31/03/2015	Refundable des	F	Period: Mo	nth 💌	Rental end o	late: 31 May 2015
Payment information		Rental Charge Ret	urn/cleaning cha	1	File ()			
Payment information			Delivery require Total	ок	Clos	e value for ir	isurance purposes:	0.00
Total to pay now: 19.96	Payment info	ormation	Total to pay now		19.96			

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

reement			-		
t Preview					
4 N N D 40 00					
s r r vei una unar∙ 11				_	
				<u> </u>	
P	ontal Ac	ireement			
	ental Ag	freement			
See over fo	or terms and conditi	ons and details of insu	rance		
l agree to rent the following ins	strument for a	OurRef	1000002-9		
Name Ser	ial Number	Name	Sparkstone Retai	1	
Rental - Violin 1/16		Address	Botley Mills	;	
Rental from	31/03/2015		Botley Hil	1	
Rental to	31/05/2015		Hampshire		
Deposit	9.98		0110070500		
Rental Charge (2 months at 4.99)	9.98	Telephone	01489795000	,	
Retum/Cleaning Charge	0.00	EmailAddress	support@sparkstone.co.uk		
Insurance taken	No	Value for insuranc	e purposes 0.00		
Insurance Premium	0.00			-	
Delivery Required	No				
Delivery Charge	0.00				
Total	19.96				
Total to pay now	19.96				
				-	

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

💭 Sparkstone Retail - SHOP - Sales transactions by MASTER on till 1 at Reading	: V /	
Edit Hickies Music - Branch EPOS system Till 1		
Total Sale Value Sparkstone Retail Stock Customer E 19.96 Hill Bolieve	کی ۱ Layaway	s Settle
1 DEPREF Refundable deposit E9.9	5	
1 @ £9.98 2 RINTAL 2 RINTAL	2 Misc	Main
Kertua (trange 19,98	° ≶	
	3 Refunds	Line
	Æ	
	4 Repairs	Order
	\$	
	5 Rentals	Other
	-1	200
	6 More	Discard
	谷	Go To Top
Scan an item or select an option	\$	Go To End

The items will then be listed in the sales window:

At this point the deposit and the renatl 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 bedisplayed:



C Financial de	tails for Test										? 🗙
Order Number	Order Date	Inv/Crn Nur	ber Inv/Crn Date	User	Til	Order Value	Status	Customer Ref	Notes		1
10001972	31 MAR 15	26	31 MAR 15	MASTER	1	19.	96 INVOICED	1		- A	
10001959	31 MAR 15	25	31 MAR 15	MASTER	1	14.	97 INVOICED				
10001945	30 MAR 15	24	30 MAR 15	MASTER	1	0.0	1 INVOICED				
10001942	30 MAR 15	23	30 MAR 15	MASTER	1	0.0	1 INVOICED				
10001940	30 MAR 15	22	30 MAR 15	MASTER	1	0.0	1 INVOICED			- I I I I I I I I I I I I I I I I I I I	
10001935	30 MAR 15	21	30 MAR 15	MASTER	1	4.9	99 INVOICED			· · · ·	
10001932	30 MAR 15	20	30 MAR 15	MASTER	1	14.9	97 INVOICED				
10001930	30 MAR 15	19	30 MAR 15	MASTER	1	9.5	98 INVOICED				
10001929	30 MAR 15	18	30 MAR 15	MASTER	1	-9.5	98 INVOICED				
10001928	30 MAR 15	17	30 MAR 15	MASTER	1	14.9	97 INVOICED				
10001927	30 MAR 15	16	30 MAR 15	MASTER	1	-9.5	98 INVOICED				
10001925	30 MAR 15	15	30 MAR 15	MASTER	1	14.9	97 INVOICED			- #a	V
4										 Search 	Show All
Mrs C Test						74.8	37				
↓ View	Settleme	ent Dep	osits Orde	r Notes	Extra (Order	Rentals	Addre	ery 💉 Invoice	Job Search	Refund Excess
Getano	D'O'COM	·			211101111	00011		Addre		ocuren	Payments
Type Details		Qty	Stock Code		Gross I	Discount Po	st Disc. Status		Serial Numb	ber	
										<u> </u>	*
											11
											_
										Taw	
										Inclusive	8
4											
					0.00	0.00	0.00				
(E) Invoice	as Delive	ery as C	order Extra	Detail	Repai	r	c	Cancel	Refund	Settle	Dack
eas invoice	Not	e car	Conf. Infor	mation	Item			Sale	Sale	Order	- Back

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

											1 (\$	Rentals short term)
Rentals N	lanagement								- 8	×		
Print	-								·			
												Rentals
Rental #	Stock Code	Serial Number	Installme	nt Date Payable	Installments Paid	Instalments Left	utstanding Arre	ars	Expiry Date Short/Long Terr	n	2 (long term)
8	m104		0.	00 (none)	0	0	0.00	0.00	31 MAR 15 Short	<u>^</u>		
9	RentalViolin1-16		0.	00 (none) 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 00 (none)	0	2	9.98	0.00	30 JUN 15 Long			Males
3	111104		0.	00 (none)	0	0	0.00	0.00	30 MAR 15 Long		_	маке
											3	Payment
										_		
•										+		~
 Active 	🔾 Inactive 🔾 All											
Due Date	Amount	Doid	Daid Data	Invoiced In	unicad Data	Invoice Number						The second secon
Due Date	Anounc	Falu	Faiu Date	Invoiced In	voiced Date	Thronce Multiper	-					End
											4	Rental
											5	
										-		
4												
 Unpaid 	O Paid O All											- ·
Agree	ment Pay	ne Invoi	t ce						ع 🧟	Back	6	Back
,	citari											

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:

Rental	Name	Out	Expiry	
4 10000002-4	Test Rental: Yamaha YFL211 Flute	30 MAR 15	30 JUN 15	<u>^</u>
5 10000002-5	Test Astrea Violin G String	31 MAR 15	31 MAR 15	
6 10000002-6	Test Astrea Violin G String	31 MAR 15	30 APR 15	
7 10000002-7	Test Astrea Violin G String	31 MAR 15	31 MAR 15	
8 10000002-8	Test Astrea Violin G String	31 MAR 15	31 MAR 15	
1001 990000525-	How Astrea Violin G String	31 MAR 15	31 MAR 15	
1002 990000525-	How Astrea Violin G String	31 MAR 15	31 MAR 15	
9 10000002-9	Test Rental - Violin 1/16	31 MAR 15	31 MAY 15	
				-
Reference		Customer		
			🗸 ок	× Cancel



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:

Code Description Serial Number		Serial Number	Rate	Ins. Pr	Ins. Value	Existing Flaws	Notes			
900597	Rental: Ya	900597	0.00	0.00	0.00					
Rental Star	t Date: 30 Mar 2	015 No: 3	F	Period: Mo	nth 🔽	Rental End	Date: 30 Jun 2015			
-Rental Co	sts	Refundable Deposit:		9.98	Paymen	t By Installments:				
		Rental Charge:		0.00						
Return/Cleaning Charge:				0.00 No Of Installments: 2						
Insurance Taken:				0.00 Installment Amount: 4			4.990000			
		Delivery Required:		0.00						
	Value fo	rinsurance purposes:		9.98						
		,,		0.00						
Notes:										

Add any additional charges to the filed 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:

Stock	Cus <u>t</u> omer	f	Total S	Sale Value (9.98)		Sparkstone Retail Botley Mills Botley Hill Botley Hampshire		V Layaways	Settle
					1 DEPREF Refundable deposit		R -£9.98		D
					1 @ 2 RENTAL Rental charge 1 @	-£9.98 £0.00	\$ £0.00	2 Misc	Main
								3 Refunds	Line
								4 Repairs	Order
								\$	7
								5 Rentals	Other
								-1	200
								6 More	Discard
								谷	Go To To
Scan an iter	n or select ar	option		*				\$	Go To End

Click 'Settle' then select the settlement option.