



**Autosoft**  
**FLEX**<sup>TM</sup>  
**DMS**  
Daily Auto Rental

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## Introduction Daily Auto Rental

The Daily Auto Rental module allows you to manage your auto rentals. You can generate rental quotes for vehicles and schedule rentals. The rental module is integrated with Service Writing, so when customers come in, you can pull customer information right from the repair order instead of having to re-enter information. The report feature allows you to print a vehicle usage report so you can track each vehicle's usage history.



At the end of the day, you update the rental information to Accounting. The Accounting Department posts the rental information to the books using the **Daily Rental** button on the Post Daily Entries to Journals menu.



## Important Program Basics

Before you begin using the Daily Auto Rental module, there are a few basic pieces of information you need to understand. This information refers to the basic makeup of the program and features you can use to assist you as you work. You should become familiar with the information in this section since it is important to the daily operation of the program.

### Understanding Menus

The program is made up of menus and input screens. Menus are screens that display all the options for a particular area of the program. With the mouse, click the button that corresponds to the option you want to select. When you select an option from a menu, you open the corresponding submenu, input screen, or prompt. The following is an example of a menu.

The screenshot shows a menu titled "Vehicle Inventory" with a title bar of the same name. The menu is divided into two columns. The left column contains four buttons: "Vehicle Information", "Rental History", "Print Vehicle Schedule", and "Exit". The right column is a large, empty rectangular area.

### Understanding Entry Screens

Input screens consist of data fields that accept input or display previously entered data. The label for each field identifies the data required for that field. The following is an example of an input screen.

The screenshot shows an input screen titled "Rental Vehicle Inventory" with a title bar of the same name. The screen contains several data entry fields and sections:

- Top Section:** Stock: 5C006, Replaces Stock: [ ], Odometer ..... Current: 3123, At Last Service: 3000, Last Service Date: 11/01/2005.
- Vehicle Information Section:** Year: 2205, Make: CHEVROLET, Model: COBALT, Body: SEDAN, VIN: 1C4J135F975310246, Plate: WXY098 [PA], Title: 987654321001, Color: BLACK, Payload: [ ].
- In Service Section:** Date: 02/01/2005, Cost: 17589.00, Odometer: 2, Date Out: [ ].
- Rental Codes Section:** Rental Code: [ ], Rates ... Hour: \$ [ ], Day: \$ 25.00, Week: \$ 175.00, Month: \$ [ ].00, Mile: \$ .25, Allowance Miles: 50.
- Radio Buttons:** Full Size , Mid Size , Compact , VAN/SUV .
- Bottom Buttons:** Exit, List, Delete, Clear, Save.

It is important to note that some fields only accept specific information. For example, you cannot enter alpha characters in a strictly numeric field, such as a date field or dollar amount field. Dollar amount fields do not accept two decimal points. It is a common error when entering dollar values to forget to include the decimal point. The system automatically adds .00 after whole dollar amounts. For example, if you type 5, the system makes the entry 5.00. If you type 500, the system makes the entry 500.00. If you type 5.00, the system leaves the value as you entered it. Always double-check the dollar values you type to ensure the amount will post correctly.

## Understanding Prompts

The program also contains prompts to assist you as you work. Prompts appear when you select to print reports or update information to master files. The prompts indicate the information you need to specify or ask you to verify you want to complete the selected task. For example, when you generate a report, the system may prompt you to enter criteria you want to use for the report, and the system will prompt you to indicate if you want to view the report on your screen or print the report to paper. Similarly, when you select to update information, the system prompts you to verify you want to complete the task. This ensures you have the opportunity to cancel an action if necessary.



Prompts also serve as a way for the system to communicate with you. In certain areas of the program, the system will prompt you to indicate errors in entries or selections you are trying to make. Read the prompt to ensure you understand the problem, and click **OK** to continue working. The important thing to remember about prompts is that you should always read the prompts that appear on the screen to ensure you understand exactly what will happen before you continue.



## Using the Keyboard and Mouse

You can use the mouse or keyboard throughout the program to maneuver through the input screens and to complete common tasks on screens. The ability to use the keyboard to maneuver through the screens as you enter information allows you to work quickly since you do not have to take your hands off the keyboard to use the mouse while you are working. The following chart identifies the keystrokes you can use to maneuver through the input screens.

Key	Use it to
<b>ENTER</b>	Move to the next field
<b>Up Arrow</b>	Move to the previous field
<b>Down Arrow</b>	Move to the next field
<b>Shift + Tab</b>	Move to the previous field

Similarly, each button in the program has a corresponding function key. You can click the button or press the function key. (When using the keyboard to select an option, it is not necessary to press ENTER.) The following chart lists common buttons and function keys you should learn. These are the most frequently available commands in the program.

Button	Function Key	Use it to
<b>Back</b>	<b>ESCAPE</b>	Close a list or the current screen
<b>Exit</b>	<b>ESCAPE</b>	Close the current screen
<b>Help</b>	<b>F1</b>	Display the Help page
<b>List</b>	<b>F3</b>	Display a search list to select an existing entry
<b>Delete</b>	<b>F8</b>	Delete a record
<b>Clear</b>	<b>F9</b>	Clear a record from the screen
<b>Next</b>	<b>PAGE DOWN</b>	Move to the next screen/page of the rental contract
<b>Back</b>	<b>PAGE UP</b>	Move to the previous screen/page of the rental contract



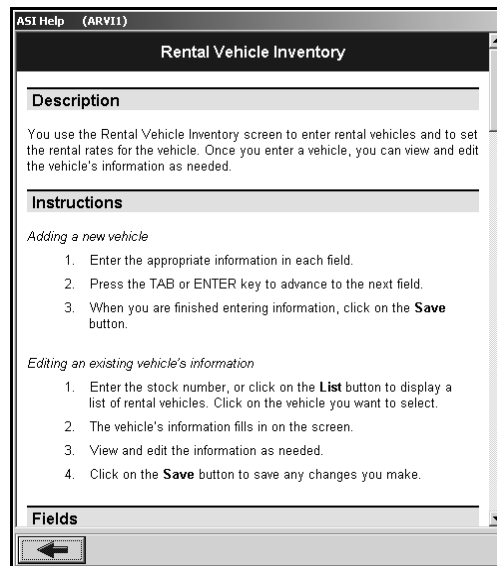
## Using the What's New? Feature

Because the Autosoft DMS program is continuously changing to meet the needs of our customers, new features are added to the software. These changes will include the addition of fields, buttons, or screens. This manual represents the program as it is now.

Click the **What's New?** icon on the Daily Auto Rental menu to read about enhancements that have been added to the Daily Rental module. This helps you quickly identify the enhancements that have been made to the system since your last web update.

## Using F1 Help

To keep our documentation updated, and our users informed, we have added individual Help pages to each screen in the program. Press F1 to display the Help page for the current screen or menu. These Help pages are updated as changes are made to the program and added to your system when you run an update from the Internet; thus, the Help pages are always current. You should become familiar with the Help page feature and use it to learn about the new information added to the program and as a way to quickly access information while you are on a screen.



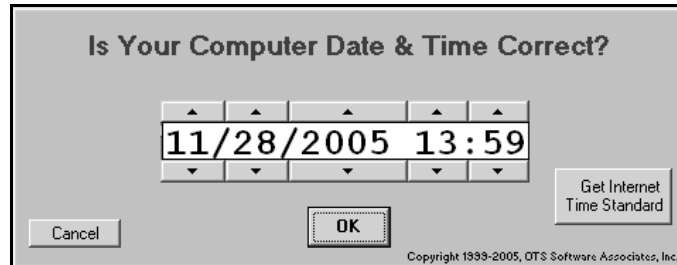
Each page provides the following pieces of information:

- A description of the screen,
- Basic instructions for using the screen,
- A list of the fields on the screen and an explanation of the information required in each field,
- A list of the buttons on the screen and instructions for using each button, and
- A list of the function keys you can use to carry out commands on the screen.

This manual assumes you are familiar with the rental process and the information required to complete a rental contract. Therefore, the manual does not cover every field in the rental module. If you have a question about the information required in a field, press F1 to read about the field on the Help page.

## Responding to the Date and Time Prompt

The first time you enter the Daily Rental module each day, you are prompted to verify that the system date and time are correct on your computer. If the date and time are not correct, use the arrow buttons to increase or decrease the values as needed. It is important that the system date and time are correct. Once the date and time are correct, click **OK** to accept the information.



## About this Manual

You are now ready to begin learning about the Daily Auto Rental module. The rest of this manual will instruct you on how to use each feature available. The manual is divided into chapters. Each chapter covers a specific area of the rental module. The chapters are arranged systematically based on the natural workflow of the Rental Department. You should read each chapter before you begin working.

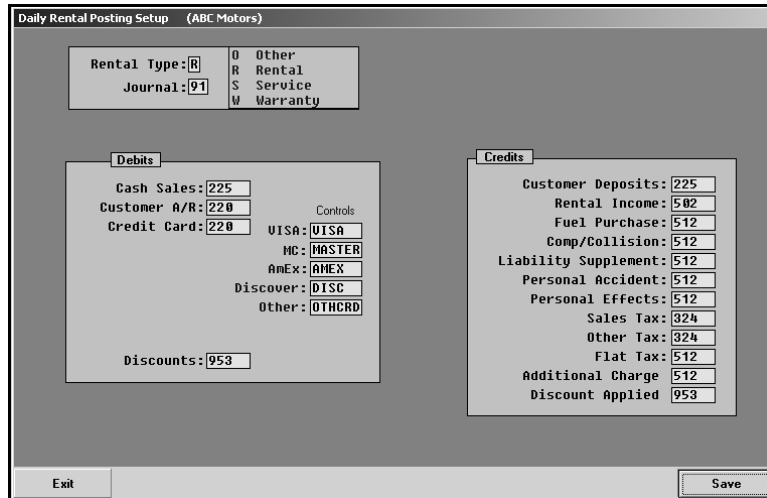
Each button on the Daily Auto Rental menu represents a different area of the rental module. Click the button that corresponds to the menu option you want to select. The corresponding menu or entry screen appears. Click **Exit to Desktop** to return to the ASI DMS main menu.

# Chapter 1 System Setup

Before you can use the Daily Auto Rental module, you must enter setup information. The setup information determines how the Daily Rental module works. You must enter setup information in the Accounting module and in the Daily Rental module.

## Daily Rental Setup in the Accounting Module

The setup information you enter in the Accounting module determines how the Daily Rental information pulls to the Daily Rental Integrated Entries in Accounting. You will enter the general ledger account numbers you want to use to post various items from the rentals. The system allows you to enter setup information by rental type (rental, service, warranty, other), so you have control over where the information posts when the journals are updated to the books.



1. Click **Accounting** on the DMS main menu.
2. Click **Setup** on the Dealership Accounting menu.
3. Click **Daily Rental** on the System Parameters menu. The Daily Rental Posting Setup screen appears.
4. In **Rental Type**, type the letter that corresponds to the rental type that will use the parameters you are entering. Type **R** for rental, **S** for service, **W** for warranty, or **O** for other.
5. In **Journal**, type the journal number used to post the rental information for this rental type.

<b>Rental Type:</b> <input type="text" value="R"/>	<b>O</b> Other
<b>Journal:</b> <input type="text" value="91"/>	<b>R</b> Rental
	<b>S</b> Service
	<b>W</b> Warranty

- Under **Debits**, type the general ledger account for cash on hand, customer A/R, credit cards, and discounts.
- Use the **Controls** fields to enter the control number used to post each type of credit card sale.



**Debits**

Cash Sales: 225  
Customer A/R: 220  
Credit Card: 2200

Controls

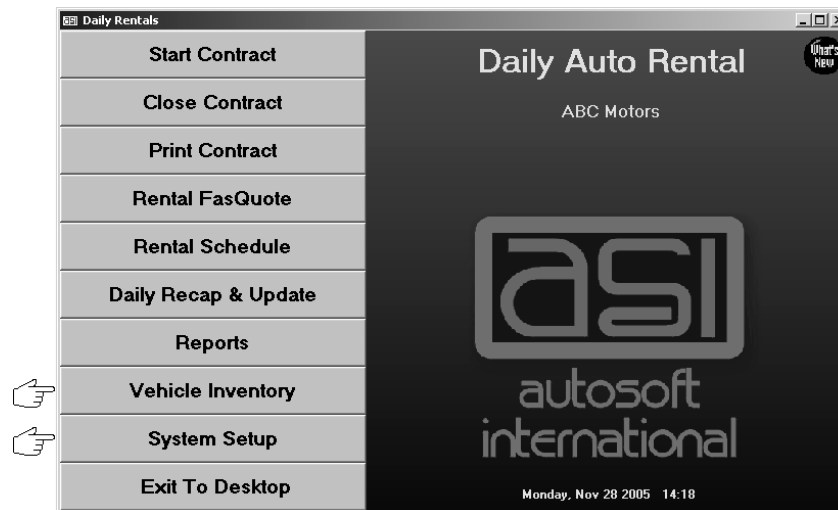
VISA: VISA  
MC: MASTER  
AmEx: AMEREX  
Discover: DISCOU  
Other: OTHCRD

Discounts: 953

- Under **Credits**, type the general ledger account for each item listed.
- The last two fields under the **Other Tax** field are user-defined fields you can create in the Daily Rental Setup in the rental module. This allows you to add two additional lines to the contract to meet your dealership's needs. Be sure to verify this information with the Rental Department before you enter the accounts to ensure the correct information posts to the correct account.
- Click **Save** to save the information.
- Continue to enter parameters for each rental type.
- When you are finished, click **Exit** to close the screen.
- Click **Exit** to close the System Parameters menu.
- Click **Exit To Desktop** to return to the ASI DMS main menu.
- Click **Daily Rental** on the ASI DMS main menu.

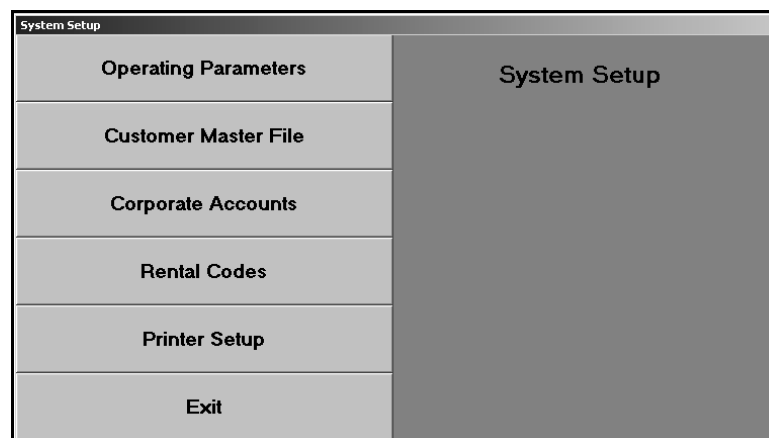
## Setup in the Daily Rental Module

Once you are finished entering setup information in the Accounting module, you need to enter setup information in the Daily Rental module. You must enter setup information in the Vehicle Inventory and System Setup. The setup information determines how the Daily Rental module works and creates a database of rental vehicles, customers, and corporate accounts. Although you can create customers and employers at the time of creating the contract, you must enter vehicles before starting a contract. The vehicles are available in a selection list. If you attempt to enter a stock number for a vehicle that is not in the vehicle inventory, you will receive an error message.



## Entering System Setup Parameters

You will begin by entering setup information using the **System Setup** button. This opens the System Setup menu. You use each button on the menu to enter different setup information. The operating parameters and rental codes are used to set tax rates, insurance rates, and rental rates. The customer and corporate account setup allows you to enter customers and employees. The entries are available in a list when generating a contract.



## Operating Parameters

Click **Operating Parameters** to set the tax and insurance rates. The system automatically pulls this information to calculate rates when you are generating contracts. You also use this screen to enter parameters that determine how the contracts will print.

## Adding the Parameters

1. Click **Operating Parameters**. The Operating Parameters screen appears.
2. In **Fuel Charge Per Gallon**, type the amount charged per gallon of gasoline used.
3. Use the three tax rate fields to specify the tax rates you want to apply. Type your state's tax rate, an additional tax rate you want to apply, and the daily flat tax rate.
4. Use the next three fields to indicate if you want the sales tax applied to fuel purchases, insurance purchases, and the flat tax. Type **Y** for yes or **N** for no.
5. The next eight fields apply to insurance sales. Type the daily and weekly rates for Comp/Collision Insurance (CCD), Liability Supplement Insurance (LIS), Personal Accident Insurance (PAI), and Personal Effects Insurance (PEC).
6. If you do not offer insurance, indicate if you want "N/A" to print on the contract next to these items. Type **Y** for yes or **N** for no.
7. Use the **Contract Desc Line** fields to enter descriptions for two additional items you want to add to the contracts. These descriptions print on the contract. You use these fields to enter additional charges or discounts your dealership may apply to rentals.
8. Use the **Apply Tax** field next to each description line to identify if the item should be taxed. Type **Y** for yes or **N** for no.
9. In **Use Contract Form Number**, type the form number for your rental contracts.

10. In **Print Name At Top Of Contract**, indicate if you want the company name to print on the top of the contract. Type **Y** for yes or **N** for no.
11. The **Last Contract Number** field will automatically update as you print contracts. It displays the contract number for the last contract created.
12. Click **Save** to save the information. The system returns you to the System Setup menu.

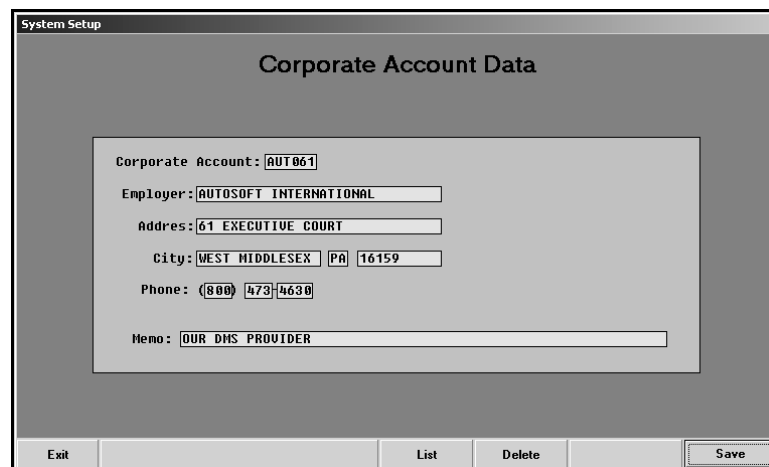
## Editing the Parameters

As you use the Daily Rental module and your dealership's needs change, you may discover you want to change the operating parameters. You can edit the parameters at any time. However, the new parameters only affect the contracts created after the change. If you need the changes to apply to existing contracts, you will have to delete the contract and recreate the contract. (See Chapter 4 for instructions on creating and editing contracts.)

1. Click **System Setup** on the Daily Auto Rental menu.
2. Click **Operating Parameters**.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes.

## Corporate Accounts

Click **Corporate Accounts** to add corporate accounts to the Daily Auto Rental module. You should enter the accounts before entering the customers since you can assign customers a corporate account. When you select a customer with a corporate account, the account information automatically pulls to the contract. In addition, the corporate accounts entered on this screen are available in a list when creating a contract. When you select an account, the system automatically pulls the employer's information. This saves you from having to manually enter the information. The system automatically creates a corporate account file for new employers you add when creating contracts and adds them to the corporate account list. You can view and edit their information on this screen as needed.



The screenshot shows a window titled "System Setup" with a sub-header "Corporate Account Data". The form contains the following fields:

- Corporate Account: AUT061
- Employer: AUTOSOFT INTERNATIONAL
- Address: 61 EXECUTIVE COURT
- City: WEST MIDDLESEX PA 16159
- Phone: (800) 473-4630
- Memo: OUR DMS PROVIDER

At the bottom of the window, there are four buttons: "Exit", "List", "Delete", and "Save".

## Adding a New Corporate Account

1. Click **Corporate Accounts**. The Corporate Account Data screen appears.
2. In **Corporate Account**, type the account number for the company. You should assign account numbers based on the same criteria used in other modules. Autosoft recommends using the first four letters of the prominent business name and the first two numbers of the address.
3. Next, type the company's name, address, and phone number.
4. Use the **Memo** field to enter any additional information about the employer.
5. Click **Save** to save the information.
6. Continue to enter accounts.
7. When you are finished, click **Exit** to close the screen.

## Editing an Existing Corporate Account

1. Type the corporate account number, or click **List** to select the account from a list of the corporate accounts.
2. The employer's information fills in on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes you make.

## Deleting an Account

1. Select the account.
2. Click **Delete**.
3. Click **Gonzo** when prompted to verify you want to delete the record.



## Customer Master File

The Customer Master File is where you enter customer information. The customers entered in the Daily Auto Rental module are added to a unique customer list available throughout the module and are available in a selection list when creating contracts. The system automatically creates a master file for new customers you add when creating contracts and adds them to the customer list. You can view and edit their information on this screen as needed.

System Setup

### Customer Master File

Customer No.: SHIT55  
 Name: STEVE SHITH  
 Address: 555 MAIN STREET  
 City: WEST MIDDLESEX  
 State: PA  
 ZIP: 16159  
 Phone: (724) 555-1234  
 Date of Birth: 05/19/1960  
 SSN: 294912458  
 License: PA123456  
 State: PA  
 Expires: 05/19/07  
 Local Contact:  
 Memo:  
 Employer Corp. Account: COMPUS COMP USA

Exit Customer List Corporate List Delete Save

## Entering a New Customer

1. Click **Customer Master File**. The Customer Master File screen appears.
2. In **Customer No**, type the customer's account number. You should assign customer numbers based on the same criteria used in other modules. We recommend using the first four letters of the customer's last name or prominent business name and the first two numbers of the address.
3. Next, type the customer's name, address, phone number, date of birth, social security number, and license number. Be sure to record the issuing state and expiration date for the license.
4. In **Local Contact**, type the name of the local contact.
5. Use the **Memo** field to enter any additional information about the customer.
6. In **Employer Corp. Account**, type the corporate account for the customer's employer. You can click **Corporate List** to select the account from a list of the corporate accounts.
7. Click **Save** to save the information.
8. Continue to enter customers.
9. When you are finished, click **Exit** to close the screen.

## Editing an Existing Customer's File

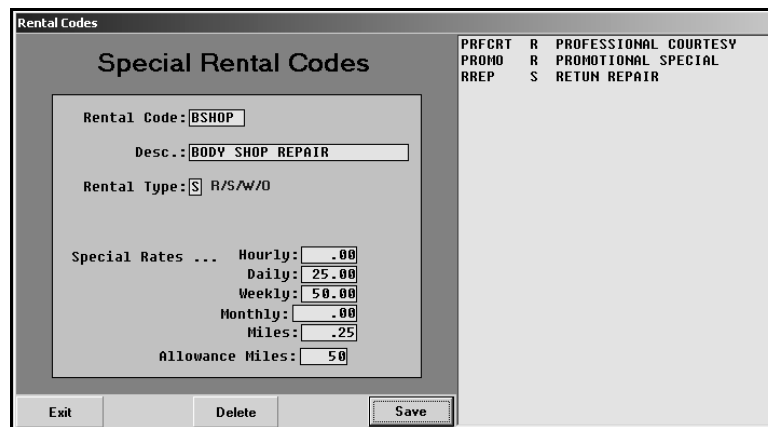
1. Type the customer number, or click **Customer List** to select the customer from a list.
2. The customer's information fills in on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes you make.

## Deleting a Customer

1. Select the customer.
2. Click **Delete**.
3. Click **Gonzo** when prompted to verify you want to delete the record.

## Rental Codes

Click **Rental Codes** to enter codes used to apply special rates. The codes are available in a list when you are creating a contract. When you select to apply a rental code to a contract, the system automatically pulls the information entered here and uses it to calculate the rate so you do not have to manually figure the totals.



The screenshot shows a window titled "Rental Codes" with a sub-header "Special Rental Codes". The form contains the following fields:

- Rental Code: BSHOP
- Desc.: BODY SHOP REPAIR
- Rental Type: R/S/W/D
- Special Rates ...
  - Hourly: .00
  - Daily: 25.00
  - Weekly: 50.00
  - Monthly: .00
  - Miles: .25
  - Allowance Miles: 50

At the bottom of the form are three buttons: Exit, Delete, and Save.

On the right side of the window, there is a list of codes:

PRFCRT	R	PROFESSIONAL COURTESY
PROMO	R	PROMOTIONAL SPECIAL
RREP	S	RETUN REPAIR

### Adding a New Code

1. Click **Rental Codes**. The Special Rental Codes screen appears.
2. In **Rental Code**, type the rental code you want to use. You should select a code that helps identify the rate.
3. Use the **Desc** field to enter a description for the code.
4. In **Rental Type**, type the letter that corresponds to the rental type for the code. Type **R** for rental, **S** for Service, **W** for warranty, or **O** for other.
5. Use the **Special Rates** fields to enter the hourly, daily, weekly, monthly, and per-mile rates for the code.
6. In **Allowance Miles**, type the number of allowed/free miles that apply to the rental code. This is the number of miles the customer can drive before a per-mile charge is applied.
7. When you are finished entering information, click **Save**.
8. The code is displayed in the list on the right side of the screen.
9. Continue to enter codes.
10. When you are finished, click **Exit** to close the screen.

### Editing an Existing Code

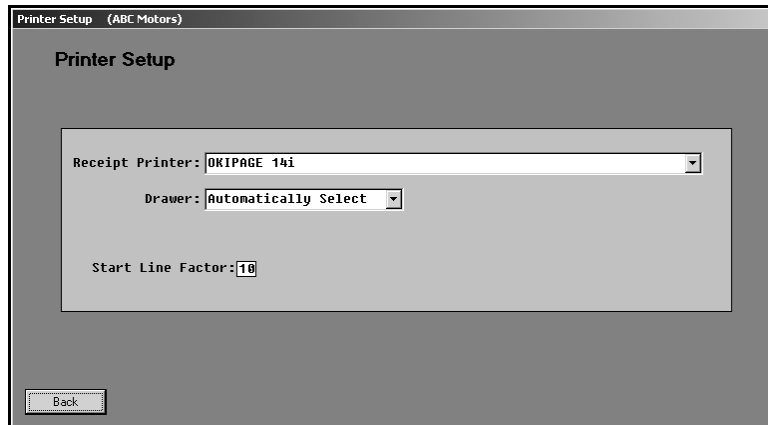
1. Type the rental code, or click the code in the list on the right side of the screen.
2. The information for the code fills in on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes.

### Deleting a Code

1. Select the rental code.
2. Click **Delete**.
3. Click **Gonzo** when prompted to verify you want to delete the record.

## Printer Setup

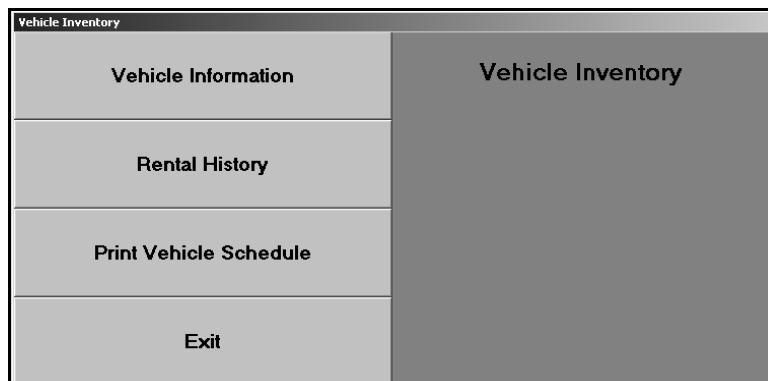
Click **Printer Setup** to set up the printer you want to use to print the rental receipts. You also specify the paper drawer you want to use.



1. Click **Printer Setup**.
2. Use the **Receipt Printer** drop-down list to select the printer you want to use to print the contracts. All the printers available for the workstation appear in the list.
3. Use the **Drawer** drop-down list to select the paper tray you want to use to print the contracts.
4. The **Start Line Factor** determines where the text starts printing on the paper. This is the same as the top margin for the paper. Type the margin value you want to use.
5. When you are finished entering information, click **Back**. The system automatically saves the changes.

## Entering Vehicle Inventory

Next, you will enter your rental vehicles into the system. Click **Vehicle Inventory** to open the Vehicle Inventory menu. You use the first button on this menu to enter vehicles. Once you enter them, you use remaining menu options to manage the information for each vehicle. The vehicles entered using this menu are available in a list when selecting rental vehicles for contracts or scheduling rentals.



## Vehicle Information

Click **Vehicle Information** to enter the rental vehicles and to set the rental rates for the vehicles. You can recall vehicles to view and edit their information as needed.

## Adding a New Vehicle

1. Click **Vehicle Information**. The Rental Vehicle Inventory screen appears.
2. Type the vehicle's stock number in the **Stock** field.
3. Type the vehicle's current mileage, the vehicle's mileage at its last service, and the date the vehicle was last serviced. The system automatically updates the vehicle's current mileage as you sign the vehicle in and out.
4. Next, enter the vehicle's model year, make, model name, body style, VIN, license plate number, issuing state for the plate, vehicle's title number, color, and payload.
5. In the **In Service Date** field, type the date the vehicle was entered into service for warranty purposes.
6. In **Cost**, type the price the dealership paid for the vehicle, and record the vehicle's mileage at the time of the purchase in the **Odometer** field.

**Note:** The **Replaces Stock** field is used to replace one vehicle in stock with another vehicle. When you replace a vehicle, the **Date Out** field automatically fills in with the date you replaced the old vehicle. See Replacing Vehicle In Inventory on page 19 for more information.

7. If a rental code applies to this vehicle, type the code in the **Rental Code** field, or select the code from the drop-down list. You entered the rental codes in the Operating Parameters of the System Setup. If you select a rental code, the rates for the code automatically fill in.
8. In the **Rates** fields, type the hourly, daily, weekly, monthly, and per mile charge for the vehicle. (If you selected a rental code, these fields automatically fill in with the rates entered in the Operating Parameters of the System Setup.)
9. In **Allowance Miles**, type the number of allowed/free miles that apply to the vehicle. This is the number of miles the customer can drive before a per-mile charge is applied. (If you selected a rental code, the allowed mileage fills in based on the mileage you entered in the System Setup.)
10. Indicate if the vehicle is a full-size vehicle, mid-size vehicle, compact vehicle, or van/SUV. Click the circle next to the appropriate selection.
11. Click **Save** to save the vehicle information.
12. Continue to enter the rental vehicles.
13. When you are finished, click **Exit** to close the screen.

### **Editing an Existing Vehicle's Information**

1. Type the stock number. You can also click **List** to displays a list of rental vehicles. Click the vehicle you want to select.
2. The vehicle's information fills in on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes.

### **Deleting a Vehicle**

If you delete a vehicle,

1. Select the vehicle.
2. Click **Delete**.
3. Click **Gonzo** when prompted to verify you want to delete the record.

## Replacing Vehicles in Inventory

Instead of deleting a vehicle, you can replace it with another vehicle. This allows the new vehicle to take over the schedule for the old vehicle and allows the old vehicle to remain in the rental history. The old vehicle will be included on the Vehicle Usage report. After the vehicle has been removed from service for more than 365 days, the system purges the vehicle record from the history.

1. Enter the stock number for the new vehicle.
2. In **Replaces Stock**, type the stock number for the vehicle the new vehicle is replacing.
3. Enter the rest of the vehicle information.
4. Click **Save**.
5. When you save the record, the old vehicle's record is moved to a history file so it will still appear on the Vehicle Usage report. The **Date Out** field in the old vehicle's record automatically fills in with the current date.

## Print Vehicle Schedule

Use this button to print a list of your rental vehicles. You should print a copy of the schedule when you are finished entering the rental vehicles so you can reference it as needed as you work. For each rental vehicle, the list displays the stock number, VIN, year, make, model, date in, and current odometer reading.

1. Click **Print Vehicle Schedule**.
2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.
3. Once you select your print type, click **Print**.

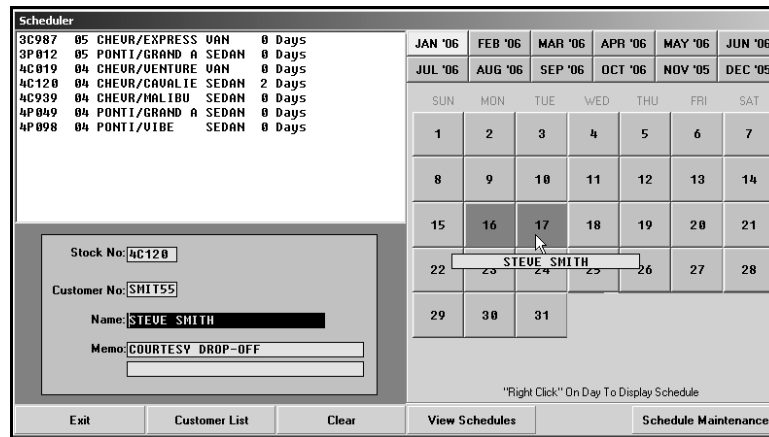
**Note:** The **Rental History** button is used to view the rental history for a vehicle. Chapter 5 explains how to view the rental history.





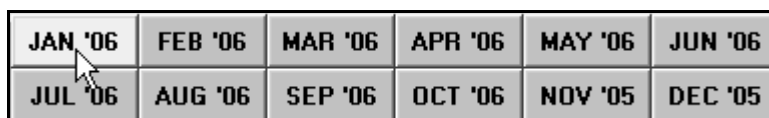
### Chapter 2 Rental Schedule

Once you start using the Daily Rental module, you use the **Rental Schedule** button to schedule rental vehicles. In addition, you can view the rental schedule for a specific vehicle for a specific month. The schedule displays which customer is due to have the vehicle each day of the month. This feature helps you track your rental vehicles so there is no confusion about who is supposed to have a vehicle and when.



### Scheduling a Rental for a New Customer

1. Click **Rental Schedule**. The Rental Schedule screen appears.
2. Type the stock number for the vehicle, or click the vehicle in the list in the window at the top of the screen.
3. Assign the customer a customer number. Remember, you should assign customer numbers based on the same criteria used in other modules. Autosoft recommends using the first four letters of the customer's last name or prominent business name and the first two numbers of the address.
4. Type the customer's full name.
5. If needed, use the **Memo** field to record any notes for the rental.
6. Click a month button at the top of the screen to select the month.



- Click the days the customer will have the vehicle. The date button turns red to indicate it has been selected.

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
STEVE SMITH						
22	23	24	25	26	27	28
29	30	31				

You can select multiple days by clicking each day. (Clicking a day twice clears the day.)

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
STEVE SMITH						
22	23	24	25	26	27	28
29	30	31				

- Click **Exit** to close the screen.

## Scheduling a Rental for an Existing Customer

- Select the rental vehicle.
- Click **Customer List** to select the customer from the list of rental customers. The customer's customer number and name automatically fill in the **Customer No** and **Name** fields.
- Use the month buttons at the top of the screen to select the month.
- If needed, use the **Memo** field to record any notes for the rental.
- Click the days the customer will have the vehicle. The date button turns red to indicate it has been selected.
- Click **Exit** to close the screen.

## Viewing the Vehicle's Schedule for a Specific Month

1. Select the rental vehicle.
2. Click the button that corresponds to the month you want to view.
3. Click **View Schedules**.
4. The screen displays each day of the month and lists the customer who is due to have the vehicle each day.

Rental Schedule For January																																			
JAN					FEB					MAR					APR					MAY					JUN					01					
JUL					AUG					SEP					OCT					NOV					DEC					02					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	03				
																																			04
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																																			30
																																			31

5. If you want to view the schedule for a different month, click the month button on the top of the screen to display the vehicle's schedule for that month.
6. If you want to view the schedule for another vehicle, click the vehicle in the list. Use the month buttons as needed.
7. Click **Back** to close the schedule.

## Viewing the Customer Scheduled for a Day

The scheduled days are shaded pink. If you want to view who is scheduled for that day, place the mouse on the day, and hold down the right mouse button. The name of the customer scheduled on that day appears above the mouse cursor. It also displays any memo comments added to the schedule. (The name of the customer in the **Name** field stays below the cursor as you work screen.)

SUN	MON	TUE	WED	THU	FRI	SAT
1				5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21

## Editing the Rental Schedule

1. Select the vehicle.
2. Click the button that corresponds to the month. The scheduled days are pink to indicate the vehicle is scheduled to be out.
3. Select the customer whose rental appointment you want to edit. (If necessary, click **View Schedules** to verify the days for the customer's rental.)
4. To add a day, click the day you want to add to the schedule. The day turns red to indicate it has been selected, and the day is added to the vehicle's schedule.

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

To remove a day, click the day. The day is no longer pink (or red), and the day is removed from the vehicle's schedule.

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

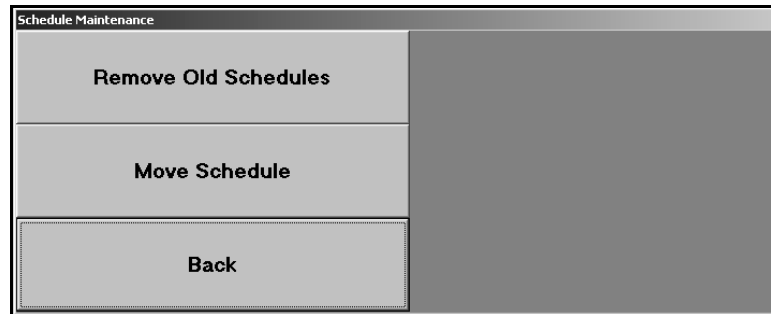
  

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

5. Click **Exit** to close the screen.

## Maintenance

The **Schedule Maintenance** button on the bottom of the Rental Schedule screen opens the Schedule Maintenance menu. You use this menu to remove old schedules and to move a schedule from one vehicle to another vehicle.



### Remove Old Schedules

Use this button to remove the schedule for the previous month. This deletes all of the appointments. Once you remove the schedules, you cannot retrieve the appointment. Please ensure you want to delete the schedule before you continue.

1. Click **Remove Old Schedules**.
2. Click the month you want to remove.




3. Click **OK** to delete the schedule.
4. Click **YES** when prompted to verify you want to delete the schedule.
5. The system displays a "Did That" message to indicate it is finished deleting the schedule. Click **OK** to acknowledge the message.

## Move Schedule

Use this button to move a rental schedule from one vehicle to another vehicle. This moves all of the appointments. This utility is useful when you need to remove a vehicle from the rental schedule and need to move the appointments to the replacement vehicle. You should only use this utility to move an existing schedule to a blank schedule. If the replacement vehicle has appointments scheduled, they will be deleted when the schedule is moved. If you need to maintain these appointments, you will have to manually move the schedule appointment by appointment.

1. Click **Move Schedule**.
2. In **From Stock Number**, type the stock number for the vehicle that currently has the schedule you want to move.
3. In **To Stock Number**, type the stock number for the vehicle that you want to take the schedule.

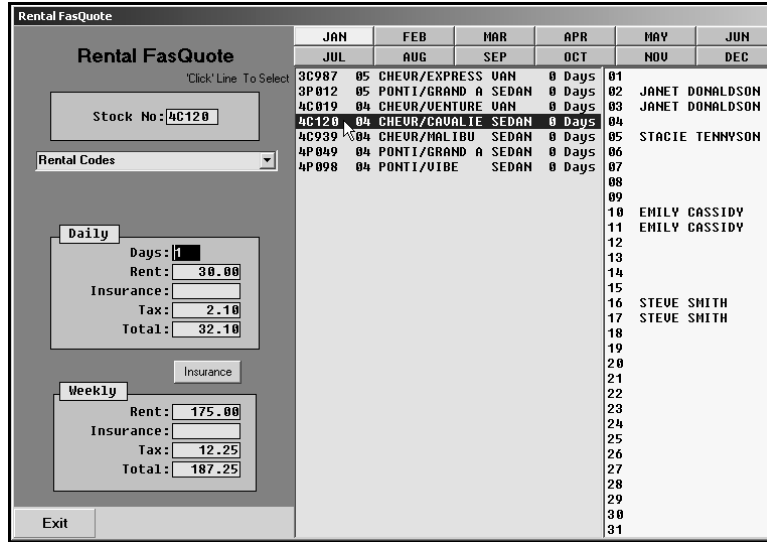
A screenshot of a software dialog box titled "Move Schedule". The dialog box has a dark header bar with the title in white. Below the header, there are two text input fields. The first field is labeled "From Stock Number:" and contains the value "3C987". The second field is labeled "To Stock Number:" and contains the value "4C019".

Move Schedule	
From Stock Number:	3C987
To Stock Number:	4C019

4. Click **OK** when prompted to verify you want to move the schedule.
5. The system displays a "Did That" message to indicate it is finished deleting the schedule. Click **OK** to acknowledge the message.

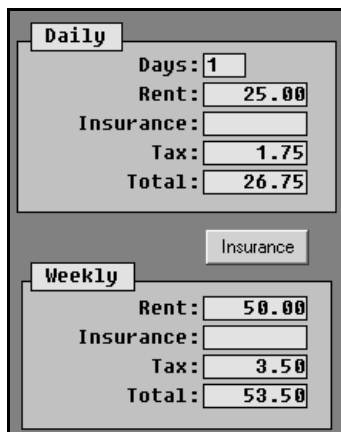
## Chapter 3 Rental FasQuote

The Rental FasQuote feature allows you to create rental quotes. The system uses the information entered for each vehicle and the information entered in the system setup to generate a quote. Each quote displays daily and weekly rates, and you can add and remove insurance with one mouse click. The feature is a fast way to get customers the information they need when deciding on a rental.



The screenshot shows the Rental FasQuote interface. On the left, there is a 'Stock No.' field with '4C120' entered. Below it is a 'Rental Codes' dropdown menu. There are two pricing sections: 'Daily' and 'Weekly'. The 'Daily' section shows 'Days: 1', 'Rent: 30.00', 'Insurance: [empty]', 'Tax: 2.10', and 'Total: 32.10'. The 'Weekly' section shows 'Rent: 175.00', 'Insurance: [empty]', 'Tax: 12.25', and 'Total: 187.25'. On the right, there is a calendar grid with months from JAN to JUN and days from 01 to 31. A list of vehicles is displayed in the center, including '4C120 04 CHEUR/CAVALIE SEDAN 0 Days' which is highlighted.

1. Type the rental vehicle's stock number, or click the vehicle in the list in the middle of the screen. (The right side of the screen displays the vehicle's schedule so you can check to see if the vehicle is available when the customer wants to schedule it. Click the month buttons to view the vehicle's schedule for another month.)
2. If applicable, select the rental code that applies to the rental.
3. The daily and weekly rental information fills in on the screen. If you selected a rental code, the rates that fill in are the rates entered for the code in the setup.



This close-up shows the pricing sections. The 'Daily' section has 'Days: 1', 'Rent: 25.00', 'Insurance: [empty]', 'Tax: 1.75', and 'Total: 26.75'. The 'Weekly' section has 'Rent: 50.00', 'Insurance: [empty]', 'Tax: 3.50', and 'Total: 53.50'. There is an 'Insurance' button between the two sections.

- If necessary, type the number of days for the rental. The daily rates change based on the number of days in the **Days** field.

Daily	
Days:	1
Rent:	25.00
Insurance:	
Tax:	1.75
Total:	26.75

Daily	
Days:	3
Rent:	75.00
Insurance:	
Tax:	5.25
Total:	80.25

- If you want to add insurance to the quote, click **Insurance**. The rates adjust to include the insurance.

Daily	
Days:	1
Rent:	25.00
Insurance:	20.00
Tax:	3.15
Total:	48.15

Insurance

Weekly	
Rent:	50.00
Insurance:	120.00
Tax:	11.90
Total:	181.90

- If you need to select another vehicle, type the stock number or select the vehicle from the list. The system resets the screen every time you select a new vehicle, so you will have to enter the number of rental days and select to include insurance as needed.
- When you are finished, click **Back** to close the screen.



## Chapter 4 Contracts

You use the first three buttons on the Daily Auto Rental menu to create, view, close, and print contracts. When the customer arrives to pick up the rental vehicle, you start a rental contract. If the customer exists in the rental customer files, you can pull the information. Similarly, if you are starting a contract for a customer with a repair order in the Service Writing module, you can pull the customer's information from the repair order instead of entering the information manually. When the customer returns the vehicle, you close and print the contract.

At the end of the day, you update the contracts to Accounting using the **Daily Recap & Update** button. Accounting can then post the contracts to the books. The update also updates the rental vehicle's history.



### Starting a Contract

To begin a new contract (or to view and edit a contract in the system), click **Start Contract**. You enter information on six screens (pages). Use the **Next** and **Back** buttons on the bottom of each screen to maneuver through the screens as needed. Additional buttons on the bottom of the screens allow you to select customers, repair orders, existing contracts, corporate accounts, and rental vehicles quickly. When you use the selection lists to select the information, the screen automatically displays the appropriate information. All you need to do is verify the information and advance to the next screen.

## Page 1

You enter customer information on page 1. The system automatically assigns a contract number as you create the contract. If you want to view an existing contract, type the contract number, or click **Contracts** to select the contract from the list of available contracts.

**Rental Agreement**

Contract No.: 1009  
 Customer No.: SMIT55  
 Repair Order:

Name: STEVE SMITH  
 Address: 555 MAIN STREET  
 City: WEST MIDDLESEX PA 16159  
 Phone: (724) 555-1234

Birthdate: 05/19/1960 Age: 44  
 SSN: 294912458

License: PA123456  
 State: PA  
 Expires: 05/19/07

Local Contact:   
 Memo:

Exit Contracts Customers Repair Orders Delete Clear Save & Exit Next

1. Select the customer, or type the customer's information.

### Starting a Contract for a New Customer

If the customer is not already in the system, add the customer by entering the customer's information on this screen. The system saves the customer's information to a master file and adds the customer to the rental customer list.

### Starting a Contract for an Existing Customer

If the customer exists in the Daily Auto Rental module, type the customer number, or click **Customers** to select the customer from the list of rental customers. When you click a customer in the list, the system automatically pulls the customer's information to the screen.

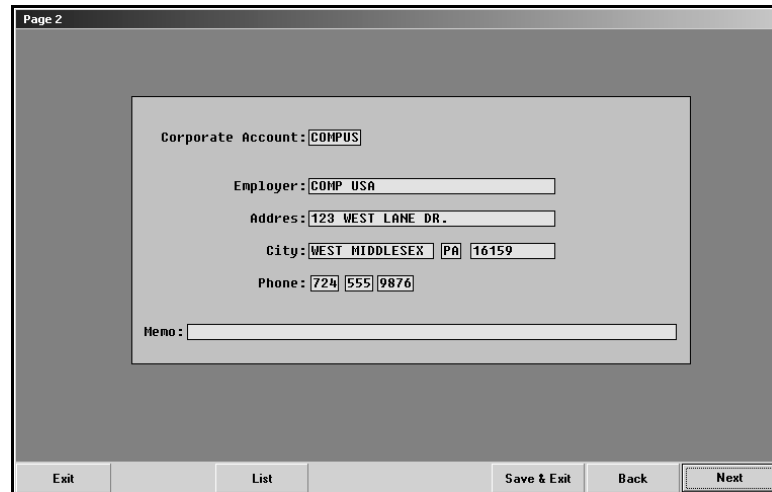
### Starting a Contract for a Service Customer

If the rental is associated with a repair order, type the repair order number in the **Repair Order** field, or click **Repair Orders** to select the customer from a list of customers with active repair orders in the Service Writing module. When you click a customer in the list, the system pulls the customer's information from the repair order. The system saves the customer's information to a master file and adds the customer to the rental customer list.

2. When you are finished, click **Next** to advance to page 2, or click **Save & Exit** to save the information and to clear the Rental Agreement screen to begin another contract.

## Page 2

You use page 2 to record the corporate account information. You can select an existing account or enter information for a new account. If you enter a new account, the system automatically adds the account to the corporate account database in the rental module.



The screenshot shows a software window titled "Page 2" with a form for entering corporate account information. The form fields are as follows:

- Corporate Account:
- Employer:
- Address:
- City:
- Phone:
- Memo:

At the bottom of the window, there are five buttons: "Exit", "List", "Save & Exit", "Back", and "Next".

1. Verify or add a corporate account as needed.

### Viewing a Customer's Existing Corporate Information

If you selected an existing customer and corporate account information was entered in the customer's master file, the corporate account information automatically fills in on the screen.

### Adding a New Corporate Account

If the employer is not in the system, add the employer by entering the corporate account information on this screen. The system saves the corporate account to a master file and adds the account to the corporate account list.

### Selecting an Existing Corporate Account

If you need to enter a corporate account for the customer, type the corporate account number, or click **List** to select the account from a list of corporate accounts. When you click an account, the system automatically pulls the account's information to the screen.

2. Click **Next** to advance to page 3, or click **Save & Exit** to save the information and to return to the Rental Agreement screen to begin another contract.

### Page 3

On page 3, you select the rental vehicle for the contract. The system pulls the rates you entered in the Daily Rental Vehicle Inventory and uses them to calculate rates that appear on page 6 of the rental contract. A vehicle must exist in the rental inventory. You cannot enter a new vehicle on this screen.

Page 3

Stock:

Year:

Make:

Model:

Body:

VIN:

Color:

Payload:

Plate:

State:

Condition Out:

Exit List Save & Exit Back Next

1. Type the stock number, or click **List** to select the vehicle from the list of rental vehicles.
2. The vehicle's information fills in on the screen.
3. In **Condition Out**, type a description of the condition of the vehicle at the time of the rental.
4. Click **Next** to advance to page 4, or click **Save & Exit** to save the information and to return to the Rental Agreement screen to begin entering another contract.

## Page 4

Use page 4 to enter the license information for any other drivers who will be driving the rental vehicle. If the customer is buying insurance for the rental vehicle, you will also enter that information on the screen. The system pulls the insurance rates from the Operating Parameters in the System Setup.

The screenshot shows a software window titled "Page 4" with the following fields and controls:

- Other Driver:** JANE SMITH
- License:** PA246808
- Age:** 40
- Other Driver:** NONE
- License:** (empty)
- Age:** (empty)
- Comp/Collision Waiver {D/W/N}:** D \$ 5.00
- Liability Supplement {D/W/N}:** D \$ 5.00
- Personal Accident {D/W/N}:** D \$ 5.00
- Personal Effects {D/W/N}:** D \$ 5.00
- D = Daily W = Weekly N = None
- Buttons:** Exit, Save & Exit, Back, Next

1. Use the fields on the left side of the screen to enter the names, license information, and age for up to two additional drivers who will be driving the rental vehicle.
2. Use the fields on the right side of the screen to indicate the insurance the customer wants on the contract.

The default entry is **N** to indicate the customer is not purchasing insurance. If the customer does not want insurance, leave the default entry.

If the customer is purchasing insurance, type **D** for daily or **W** for weekly to indicate the appropriate rate for the contract. The rates automatically fill in based on the information entered in the System Setup.

3. Click **Next** to advance to page 5, or click **Save & Exit** to save the information and to return to the Rental Agreement screen to begin another contract.

## Page 5

Enter the customer's credit card information on page 5. If the customer is not using a credit card to place a deposit on the vehicle, you can skip this screen by clicking **Next**. Instead, enter the deposit amount on page 6.

Page 5

Card..  -VISA  
 -Master Card  
 -American Express  
 -Discover  
 -Other:

Number: 5011124532569855  
Expires {mm/yy}: 08 / 07

Memo ....  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Exit Save & Exit Back Next

1. Type an **X** for the card the customer is using.
2. Type the credit card number and expiration date (month and year).
3. Use the **Memo** field to enter any additional information you want to print on the contract. Each line holds up to 40 characters. The system does not use a text wrap feature in these fields, so you must manually enter line breaks by pressing TAB or ENTER to advance to the next line. The memo information prints *exactly* as it appears on these lines.
4. Click **Next** to advance to page 6, or click **Save & Exit** to save the information and to return to the Rental Agreement screen to begin another contract.

## Page 6

Page 6 is the last page of contract. This is where you enter the due date and add any special rental codes that may apply. You have the option of saving the contract and printing a copy of the contract, or you can save the contract without printing it at this time. If you select not to print the contract, you can print it later using the **Print Contract** button on the Daily Auto Rental menu. (See page 37 for instructions on printing selected contracts.)

1. The **Date Out** field automatically defaults to the current system date.
2. In **Time Out**, type the time the customer picked up the vehicle.
3. In **Due Date**, type the date the customer is supposed to return the vehicle. Type the date in an eight-character format with or without dashes (mm/dd/yyyy or mmdyyy).
4. The **Rental Rates** fields automatically default to the rates entered for the vehicle in the vehicle inventory.

If special rental rates apply to the customer or corporate account, click the rental code in the list at the top of the screen. The rental rates for the selected code automatically fill in.

5. The **Odometer Out** field displays the vehicle's current mileage. The system automatically tracks the mileage as you check the vehicle in and out.
6. In **Allowance Miles**, type the number of miles the customer can drive the rental vehicle before per-mile charges apply.
7. In **Refuel**, type the number of gallons needed to refuel the vehicle, and enter the amount charged per gallon in the first \$ field. The second \$ field automatically calculates the total refueling charge. You do not have to enter this information on this screen. Instead, you can enter this information when you close the contract.
8. Click **Save & Print** to advance to the Print Contract screen, or click **Save & Exit** to save the information and to return to the Rental Agreement screen to begin another contract.

## Editing a Contract

You can recall a contract to review the information and to edit the contract as needed.

1. Click **Start Contract**.
2. Click **Contracts**, and select the contract from the list.
3. Click **Next** to advance to the necessary page.
4. Click in a field, and edit the information as needed.
5. Click **Save & Print** to advance to the Print Contract screen, or click **Save & Exit** to save the information and to return to the Rental Agreement screen.

## Deleting a Contract

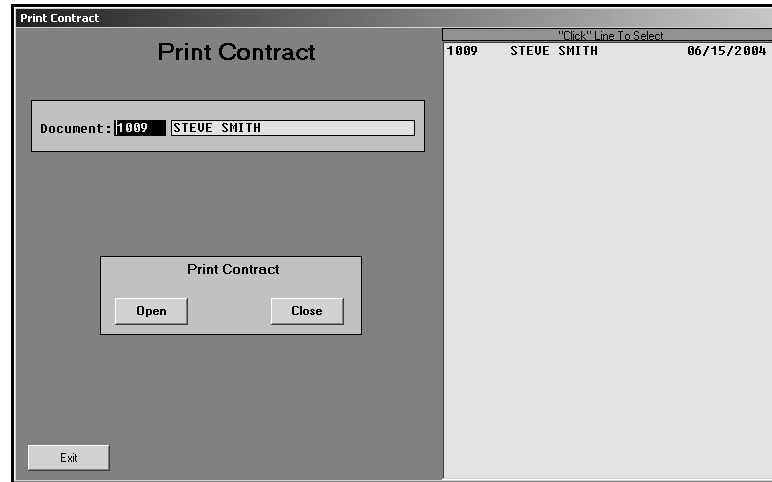
If necessary, you can delete an active contract from the system. Once you delete a contract, you cannot recall the contract information, so verify you actually want to delete the contract.

1. Click **Start Contract**.
2. Click **Contracts**, and select the contract from the list.
3. Click **Delete**.
4. Click **Gonzo** when prompted to verify you want to delete the contract. The contract no longer appears in the contract list.



## Printing a Contract

When you click **Print Contract** on the Daily Auto Rental menu or after clicking **Save & Print** when creating a contract, you open the Print Contract screen. You use this screen to print the contract. When you print the contract, you have the option of printing the contract and closing it or printing the contract and leaving it open.



1. If you advanced to this screen from page 6 of the contract, the contract number appears in the **Document** field, and the customer's name is displayed for your reference.

If you opened this screen by clicking **Print Contract** on the Daily Auto Rental menu, type the document number, or click the contract you want to select in the list on the right side of the screen.

2. Click the button that corresponds to the action you want to take:
  - Click **Open** if you want to print the contract but leave it open.
  - Click **Close** if you want to print the contract and close it.
3. Click **OK** when prompted to verify your printer is ready.
4. Print additional contracts as needed.
5. Click **Exit** to close the screen.

## Closing a Contract

When the customer returns the rental vehicle, you close the contract using the **Close Contract** button on the Daily Auto Rental menu. When you select the contract, the system pulls the information you entered and displays it in the appropriate fields on this screen. At this time, you add any additional information or edit any of the information from the original contract. As you add and edit the information, the system calculates and totals the rental charges. Several **Subtotal** fields on the screen display the contract total for different parts of the contract. When you verify the contract is correct, you close and print it.

Close Contract	
Close Contract: 1009	STEVE SMITH
Due Date: 06/17/2004	
Date Out: 06/15/2004	
Date In: 06/17/2004	
Time In: 9:15	
Condition In: GOOD	
Rental Rates	
Hours: @ \$ .00	\$
Days: 2 @ \$ 30.00	\$ 60.00
Weeks: @ \$ 175.00	\$
Months: @ \$ .00	\$
Odometer	
In: 3405	
Out: 3362	
Driven: 43	
Allowance: 50	
Distance: @ \$ .25	\$
Total Distance & Rental	\$ 60.00
Refuel: 1 @ \$ 2.00	\$ 2.00
Total Rental/Refuel	62.00
Fuel Purchase:	
Comp/Collision Waiver	10.00
Liability Supplement	10.00
Personal Accident	10.00
Personal Effects	10.00
Sub Total	102.00
Other Tax: %	
Sales Tax: 7.000%	7.14
Flat Tax:	
Additional Charge	
Discount Applied	
Sub Total	109.14
Less Credits	
Total Charges	109.14
Less Deposit	20.00
Balance Due	89.14
Cash Refund	
Cash	
Charge	89.14
Exit	Contracts
Clear Screen	Save & Print

1. Click **Close Contract**. The Close Contract screen appears.
2. Type the contract number you want to close, or click **Contracts** to select the contract from the list of available contracts. The contract information fills in on the screen.
3. The **Due Date** and **Date Out** fields display the date the customer was supposed to return the vehicle and the date the customer picked up the vehicle.
4. The **Date In** field automatically defaults to the current system date.
5. In **Time In**, type the time the customer returned the vehicle.
6. In **Condition In**, type a description of the vehicle's condition when the customer returned the vehicle.

Due Date:	06/17/2004
Date Out:	06/15/2004
Date In:	06/17/2004
Time In:	9:15
Condition In:	GOOD

7. The **Rental Rates** fields display the rates for the contract. These are the rates from page 6 of the contract. You can edit the fields as needed.

Due Date:	<input type="text" value="06/17/2004"/>
Date Out:	<input type="text" value="06/15/2004"/>
Date In:	<input type="text" value="06/17/2004"/>
Time In:	<input type="text" value="9:15"/>
Condition In:	<input type="text" value="GOOD"/>
<b>Rental Rates</b>	
Hours:	<input type="text"/> @ \$ <input type="text" value=".00"/> \$ <input type="text"/>
Days:	<input type="text" value="2"/> @ \$ <input type="text" value="30.00"/> \$ <input type="text" value="60.00"/>
Weeks:	<input type="text"/> @ \$ <input type="text" value="175.00"/> \$ <input type="text"/>
Months:	<input type="text"/> @ \$ <input type="text" value=".00"/> \$ <input type="text"/>

8. Enter the vehicle's mileage in the **In** field. The **Out** field displays the mileage when the customer picked up the vehicle. When you enter the current mileage, the **Driven** field fills in with the number of miles the customer drove the vehicle.

<b>Odometer</b>	
In:	<input type="text" value="3405"/>
Out:	<input type="text" value="3362"/>
Driven:	<input type="text" value="43"/>
Allowance:	<input type="text" value="50"/>
Distance:	<input type="text"/> @ \$ <input type="text" value=".25"/> \$ <input type="text"/>
Total Distance & Rental \$ <input type="text"/>	

If the "Driven" mileage is greater than the "Allowed" mileage, the excess miles appear in the **Distance** field. If you entered a per-mile rate for the vehicle, the rate fills in, and the system calculates the total mileage cost.

If you did not enter a per-mile rate for the vehicle, type the appropriate rate, and the system automatically calculates the mileage charge.

<b>Odometer</b>	
In:	<input type="text" value="3415"/>
Out:	<input type="text" value="3362"/>
Driven:	<input type="text" value="53"/>
Allowance:	<input type="text" value="50"/>
Distance:	<input type="text" value="3"/> @ \$ <input type="text" value=".25"/> \$ <input type="text" value=".75"/>
Total Distance & Rental \$ <input type="text" value="60.75"/>	

9. The **Total Distance & Rental** field calculates the total cost for the rental fee and mileage.
10. The **Refuel** fields default to the refueling information entered on page 6 of the contract. If necessary, edit the information.

If you did not enter refueling information on the contract, the cost per gallon defaults to the value entered in the Operating Parameters. Type the number of gallons as needed. The system calculates the total refueling cost as you enter values in these fields.

<b>Odometer</b>			
In:	<input type="text" value="3405"/>		
Out:	<input type="text" value="3362"/>		
Driven:	<input type="text" value="43"/>		
Allowance:	<input type="text" value="50"/>		
Distance:	<input type="text"/>	@ \$	<input type="text" value=".25"/> \$ <input type="text"/>
<b>Total Distance &amp; Rental</b>		\$	<input type="text" value="60.00"/>
Refuel:	<input type="text" value="1"/>	@ \$	<input type="text" value="2.00"/> \$ <input type="text" value="2.00"/>

11. The **Total Rental/Refuel** field adds the totals on the left side of the screen and displays the total for the contract for just the rental, distance charges, and refueling charges.
12. Use the **Fuel Purchase** fields to enter additional fueling charges.
13. The **Comp/Collision Waiver, Liability Supplement, Personal Accident, and Personal Effects** fields pull the insurance charges from page 4 of the contract. If necessary, you can add insurance or edit the rates.
14. The **Subtotal** field displays the total for all of the rental and insurance charges.

<b>Total Rental/Refuel</b> .....	<input type="text" value="62.00"/>
<b>Fuel Purchase:</b> <input type="text"/>	<input type="text"/>
<b>Comp/Collision Waiver</b> ....	<input type="text" value="10.00"/>
<b>Liability Supplement</b> .....	<input type="text" value="10.00"/>
<b>Personal Accident</b> .....	<input type="text" value="10.00"/>
<b>Personal Effects</b> .....	<input type="text" value="10.00"/>
<b>Sub Total</b> .....	<input type="text" value="102.00"/>

15. The **Other Tax**, **Sales Tax**, and **Flat Tax** fields default to the values entered in the Operating Parameters. The system automatically calculates the flat tax and sales tax based on the percentage you entered. If necessary, you can edit the rates in these fields, and the system automatically recalculates the tax based on the new rate. The sales tax is applied to the flat tax only if you indicated you wanted it to be applied in the Operating Parameters.

Other Tax:	<input type="text"/>	% .....	<input type="text"/>
Sales Tax:	7.000	% .....	7.14
Flat Tax:	<input type="text"/>	.....	<input type="text"/>

16. The next two fields are the user-defined fields you entered descriptions for in the Operating Parameters. Type values in the fields as needed. To subtract charges, type a minus sign (-) before the amount. For example, to take off \$10.00, you would type -10.00.

Additional Charge .....	<input type="text"/>
Discount Applied .....	<input type="text"/>

**Tip:** If you are using a flat tax rate, you cannot use the user-defined **Contract Description Line 1** (under **Sales Tax**) because the system needs that line to print the tax on the contract. The flat tax will print on the sales tax line, and the sales tax will print on the first additional description line. The system will prompt you to remind you of this restriction if you attempt to apply a flat tax and use the first additional description line. There is no restriction, however, for the use of **Contract Description Line 2**.

17. The **Subtotal** field displays the total for the contract up to this point.

Total Rental/Refuel .....	<input type="text"/>	62.00	
Fuel Purchase: <input type="text"/>	.....	<input type="text"/>	
Comp/Collision Waiver ...	<input type="text"/>	10.00	
Liability Supplement .....	<input type="text"/>	10.00	
Personal Accident .....	<input type="text"/>	10.00	
Personal Effects .....	<input type="text"/>	10.00	
Sub Total .....	<input type="text"/>	102.00	
Other Tax:	<input type="text"/>	% .....	<input type="text"/>
Sales Tax:	7.000	% .....	7.14
Flat Tax:	<input type="text"/>	.....	<input type="text"/>
Additional Charge .....	<input type="text"/>		
Discount Applied .....	<input type="text"/>		
Sub Total .....	<input type="text"/>	109.14	

18. Type the amount of any credits in the **Less Credits** field. The system automatically subtracts the amount from the **Total Charges** field.
19. The **Less Deposit** field displays the amount the customer put down on the rental. You entered this amount on page 6 of the contract. The **Balance Due** field reflects the total charges less the deposit amount.
20. If you need to refund cash, type the amount in the **Cash Refund** field. If the customer's deposit amount is more than the total charge, the system automatically calculates the refund the customer is due and displays the amount in this field.
21. The total amount due for the rental contract appears in either the **Cash** field or the **Charge** field. If you entered credit card information for the customer on page 5 of the contract, the total appears in the **Charge** field. If you did not enter credit card information, the total appears in the **Cash** field.

Less Credits .....	:	<input type="text"/>
Total Charges .....	:	109.14
Less Deposit .....	:	20.00
Balance Due .....	:	89.14
Cash Refund .....	:	<input type="text"/>
Cash .....	:	<input type="text"/>
Charge .....	:	89.14

22. Once you have verified all of the information, click **Save & Print**. The system advances you to the Print Contract screen. The contract information fills in the appropriate fields.
23. Click **Close** to close and print the contract.
24. Click **OK** when prompted to verify your printer is ready.

## Updating the Contracts

At the end of the day, click **Daily Recap & Update** to finalize the contracts, send the contracts to Accounting, and update the information to the rental records. Only contracts you finalize using the **Finalize Contracts** button are included in the update. Once you update the contracts, the information is available for reports and is added to the rental vehicle history.

Daily Recap & Update	
Finalize Contracts	Daily Recap & Update
Daily Report	
Update Closed Contracts	
Exit	

## Finalize Contracts

Before you update the contracts, you use the **Finalize Contracts** button to verify which contracts you want to update. The screen lists all of the rental contracts. You must verify if each contract is closed. The update only sends the contracts you mark as closed on this screen to Accounting. The contracts marked open remain in the contract list in the Daily Auto Rental module. This gives you a chance to keep a contract open before updating the information at the end of the day.

Daily Update						
1009	06/17/2004	Open	STEVE SMITH	04	CHEVROLET	CAVALIER
1011	06/16/2004	Open	RHONDA GHOUDY	03	PONTIAC	GRAND AM
1012	06/17/2004	Open	SHANE MILLER	04	CHEVROLET	MALIBU
1015	06/17/2004	Open	RAY ANDREWS	04	CHEVROLET	VENTURE
1016	06/17/2004	Open	NANCY HART	04	PONTIAC	VIBE

Exit \*Click\* Line To Toggle Open/Closed

1. Click **Finalize Contract**. The Daily Update screen appears.
2. The screen lists all the rental contracts. Every contract has an open status.

Daily Update						
1009	06/17/2004	Open	STEVE SMITH	04	CHEVROLET	CAVALIER
1011	06/16/2004	Open	RHONDA GHOUDY	03	PONTIAC	GRAND AM
1012	06/17/2004	Open	SHANE MILLER	04	CHEVROLET	MALIBU
1015	06/17/2004	Open	RAY ANDREWS	04	CHEVROLET	VENTURE
1016	06/17/2004	Open	NANCY HART	04	PONTIAC	VIBE

3. Click the contracts to change their status from Open to Closed (and vice versa). You must change the status for every contract you want to update to Accounting.

Daily Update						
1009	06/17/2004	CLOSED	STEVE SMITH	04	CHEVROLET	CAVALIER
1011	06/16/2004	CLOSED	RHONDA GHOUDY	03	PONTIAC	GRAND AM
1012	06/17/2004	CLOSED	SHANE MILLER	04	CHEVROLET	MALIBU
1015	06/17/2004	Open	RAY ANDREWS	04	CHEVROLET	VENTURE
1016	06/17/2004	CLOSED	NANCY HART	04	PONTIAC	VIBE

4. When you are finished verifying all of the contracts, click **Exit** to return to the Daily Recap & Update menu.

## Daily Report

Use this button to print a daily rental summary for the closed contracts. When prompted to verify your printer is ready, select **To Printer** to print the information or **To Screen** to view the information on your screen. Once you select your print type, click **Print**. The report displays the rental information for each contract, and the bottom of the report displays the total for all of the contracts that day.

## Update Closed Contracts

Use this button to update the closed/finalized contracts. This sends the information to Accounting and updates the vehicle records.

1. Click **Update Closed Contracts**.
2. Click **OK** when prompted to verify you want to update the records.
3. When the update is finished, the system displays a "Did That" message. Click **OK** to acknowledge the message.

**Remember:** Once updated, the Accounting Department can review the contracts using the Daily Rental Integrated Entries (**Journal Entries>Integrated Entries>Daily Rentals**). Then, the Daily Rental information is updated to the books using the **Daily Rental** button on the Post Daily Entries to Journals menu in the Accounting module.

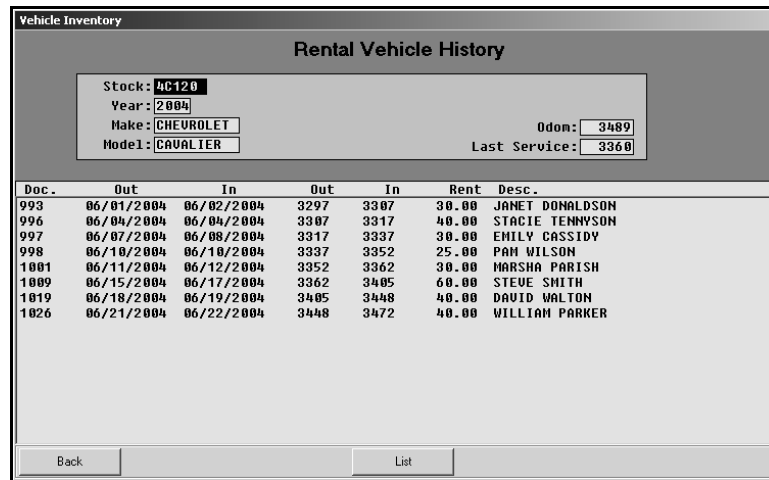


## Chapter 5 Reports & Rental History

Once you update contracts, the system moves the contract information to the vehicle's rental history. The system uses the history to generate reports you can use to analyze your rental activity.

### Rental History

You can view the history for any rental vehicle at any time. In addition to identifying the customers who rented the vehicle, the Rental Vehicle History screen may help you identify the vehicles customers are renting more frequently. The screen is also useful to quickly identify vehicles' current mileage and last service date.



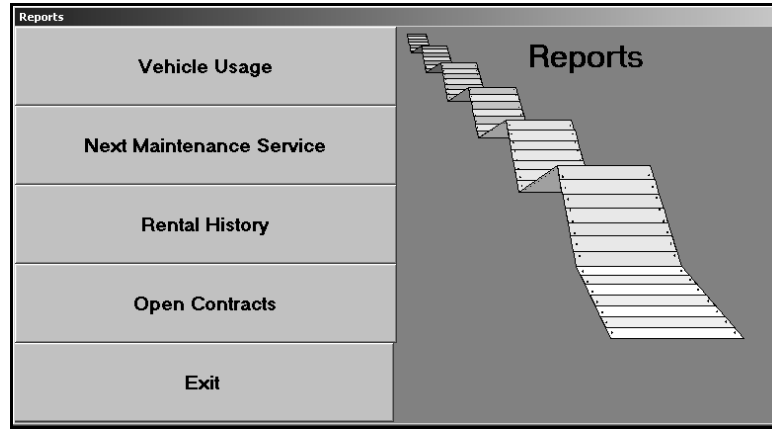
The screenshot shows a software interface titled "Rental Vehicle History". At the top, there are input fields for vehicle information: Stock: 4C129, Year: 2004, Make: CHEVROLET, Model: CAVALIER, Odom: 3489, and Last Service: 3360. Below these fields is a table with the following columns: Doc., Out, In, Out, In, Rent, and Desc. The table contains seven rows of rental data.

Doc.	Out	In	Out	In	Rent	Desc.
993	06/01/2004	06/02/2004	3297	3307	30.00	JANET DONALDSON
996	06/04/2004	06/04/2004	3307	3317	40.00	STACIE TENNYSON
997	06/07/2004	06/08/2004	3317	3337	30.00	EMILY CASSIDY
998	06/10/2004	06/10/2004	3337	3352	25.00	PAM WILSON
1001	06/11/2004	06/12/2004	3352	3362	30.00	MARSHA PARISH
1009	06/15/2004	06/17/2004	3362	3405	60.00	STUE SMITH
1019	06/18/2004	06/19/2004	3405	3448	40.00	DAVID WALTON
1026	06/21/2004	06/22/2004	3448	3472	40.00	WILLIAM PARKER

1. Click **Vehicle Inventory** on the Daily Auto Rental menu.
2. Click **Rental History** on the Vehicle inventory menu.
3. Type the vehicle's stock number, or click **List** to select the vehicle from a list of rental vehicles.
4. The vehicle's information fills in the fields at the top of the screen.
5. The bottom of the screen displays the rental history for the vehicle. For each contract, the list displays the contract number, dates the customer signed the vehicle out and in, the vehicle's mileage out and in, the rental amount, and the customer's name.
6. To view another vehicle, type the vehicle's stock number, or click **List** to select the vehicle.
7. When you are finished, click **Back** to close the screen.

## Reports

Click **Reports** to open the Reports menu. You use this menu to print rental reports. You can also view a list open contracts from this menu.



### Vehicle Usage

The Rental Vehicle History screen displays information for one vehicle at a time, so if you want to see the history for your entire rental inventory, you will need to print a Vehicle Usage report. Unlike the Rental Vehicle History screen, this report displays the usage statistics for every rental vehicle for a specified date range. Therefore, if you want to compare vehicle usage, it may be easier to print this report and compare the information side by side.

1. Click **Vehicle Usage**.
2. Enter the date range you want to use for the report. Type the starting date in the Usage **From** field and the ending date in the **To** field.
3. When prompted to verify your printer is ready, select your print criteria.

### Next Maintenance Service

Use this button to print a report that lists when the rental vehicles are due for maintenance. The system determines this based on the last service date and odometers reading entered on the Rental Vehicle Information screen.

1. Click **Next Maintenance Service**.
2. When prompted to verify your printer is ready, select your print criteria.

## Rental History

Use this button to reprint a contract in the rental history. The system adds the contracts to the history after you perform the daily update. The system will hold a contract in history for 60 days.

1. Click **Rental History**.
2. The Closed Contracts screen displays all the closed contracts in the rental history. If necessary, use the scroll bars to view the list.
3. To re-print a contract, click the contract in the list. Click **OK** when prompted to verify your printer is ready.
4. Click **Back** to close the list.

## Open Contracts

Use this button to view a list of the open contracts. The screen lists the rental stock number, contract number, customer's name, date out, and due date for each rental.

1. Click **Open Contracts**.
2. The Active Contracts screen displays all the open contracts. If necessary, use the scroll bars to view the list.
3. Click **Back** to close the list.



## Conclusion

This completes the instructions for using the Daily Auto Rental module. You should reference the manual as you work until you are comfortable with the procedures. When you do have questions, press F1 to display the Help page so you can read detailed information about each screen. If you cannot find the information you are looking for, call the Autosoft Support Desk at (800) 473-4630 for assistance.

