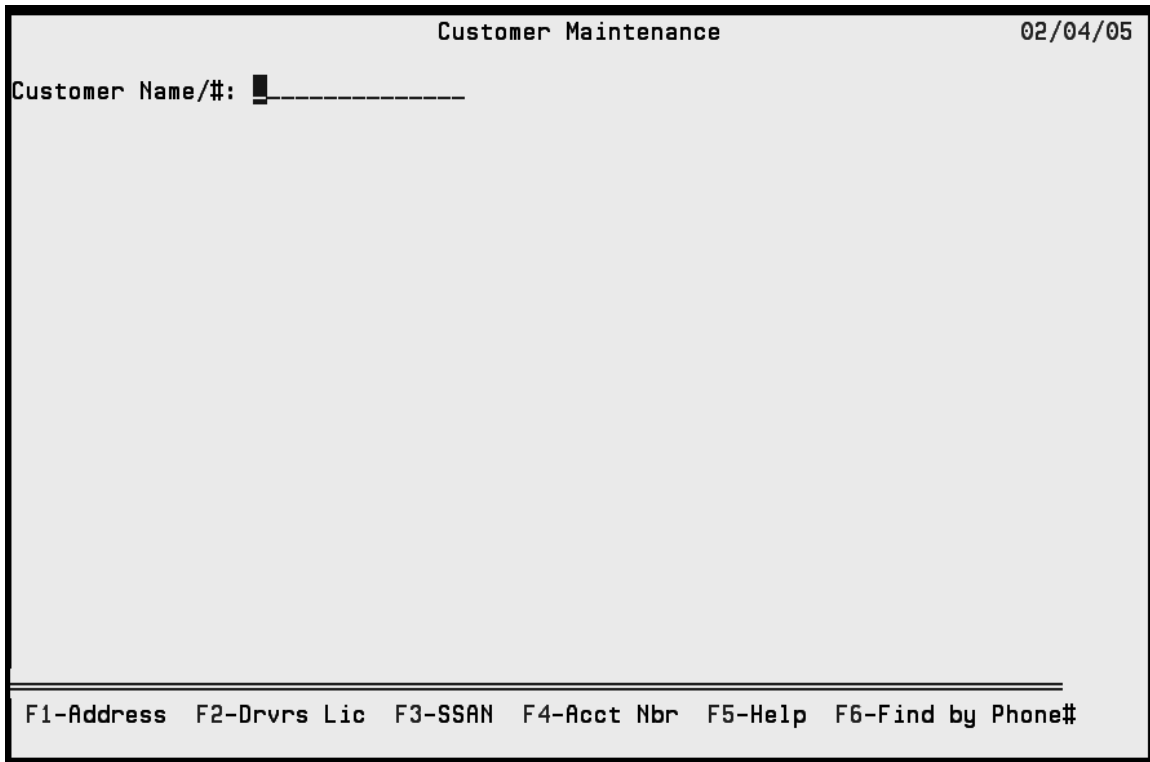# Chapter 8 - Adding a New Rental Agreement – NEW

To add a new Rental Customer agreement, select Add a New Rental Agreement from the menu or press the F10 key and at the command line type in "NEW" and press the ENTER key. You will be prompted for printer or file pathname. Enter the correct information or press the ENTER key to accept the default. See *Chapter 17 Introduction to Reports* for additional information about the printer/file pathname screen. See Figure 8-1.

```
                          Customer Maintenance                        02/04/05

Customer Name/#: █_____







































 F1-Address   F2-Drvrs Lic   F3-SSAN   F4-Acct Nbr   F5-Help   F6-Find by Phone#
```

**Figure 8- 1 Customer Maintenance Screen**

## *Find a customer in the database*

At the Customer Name/#: prompt enter the customer's name (last name first) and press the ENTER key, or one of the following in conjunction with the function keys at the bottom of the screen, account number (F2), home phone number (F6), address (F1), drivers license number (F2) or social security number (F3).  You can enter name, address or account number in partial or complete form for alpha or numeric listing.  For example, if you wanted to look up a customer by name, whose last name was Magaw, you could enter "MAG" and press the ENTER key twice and any customers on file would be listed on the screen in alphabetical order starting with "MAG".  See Figure 8-2.  The social security number may or may not display on your listing screen depending on if you have the security authorization to see it.

```
                        Customer Maintenance                    07/12/07

Customer Name/#: MAG

  Acct Nbr Last Name   First Name  Address          DL# Or City    S S A N
   4001799 MAGER       KEITH       3072 SANTA ANITA ANYTOWN      000-00-0001
   1003033 MAGGART     AMANDA      5014 KILLARNY ST ANYTOWN      000-00-0001
   4002467 MAGGIO      JOSEPH & S  1741 NE SAN SUCC ANYTOWN      000-00-0001
  10005579 MAGNER      NANCY       436 NW SHERRY LA ANYTOWN      000-00-0001
   3004078 MAGNOTTA    JOHN        1333 SW GASTADOR ANYTOWN      000-00-0001
  10006140 MAGRUDER    PATRICIA    2438 GARDEN TERR ANYTOWN      000-00-0001
  10003514 MAGRUDER    TROY        2211 SW SUSSET L ANYTOWN      000-00-0001
  10002370 MAGUIRE     GERALD      9900 OCEAN DR#10 ANYTOWN      000-00-0001
   3004258 MAHARAJH    CHRISTINA   342 BELMONT CIR  ANYTOWN      000-00-0001
  10011639 MAHER       RYAN        4200 SE COVE LAK ANYTOWN      000-00-0001
  10006693 MAHON       KEVIN       500 7TH PL       ANYTOWN      000-00-0001
   4000075 MAHOVETZ    CHRISTOPHE  4388 SE NIMROD L ANYTOWN      000-00-0001
   1002857 MAHRE       SARA        729 S INDIAN RIV ANYTOWN      000-00-0001
  10011726 MAIBERGER   DONNA       1642 SE MISTLETO ANYTOWN      000-00-0001
  10010498 MAIER       MATT        1096 54TH AVE    ANYTOWN      000-00-0001


 F1-Next Page    F2-Prev Page    F3-AR/RTO Hist    F4-Chg    F5-Delete    F6-Add
```

**Figure 8- 2 Customer Maintenance Screen with name lookup data**

Notice the function keys at the bottom of the screen, pressing the F1 key will advance to the next page, F2 will take you to the previous page, use your arrow keys to highlight a customer record and F3 will give you a brief summary of this customer's rental or accounts receivable payment history, F4 will allow you to change information on the customer record (address, phone number, etc.).  F6 will allow you to add a new customer to the system, see *page 7 in this section* on how to add a customer to the RSSS system.

Other examples of how to look up a customer are as follows:

## *Find a customer by address*

If you want to look up a customer by address, enter all or part of the address and press the F1 key. Customers will be listed in address order numerically. In the following example 205 was entered at the Customer/# prompt and F1 was pressed. See Figure 8-3.

```
                        Customer Maintenance                    07/12/07

Customer Name/#: 205

  Acct Nbr Last Name    First Name  Address          DL# Or City    S S A N
 ▌10007165 COOPER       RUTH        205 C  SOUTHLAND ANYTOWN     000-00-0001
  1002877 SMITH         ANDRE       205 N. 20TH ST.  ANYTOWN     000-00-0001
 10002160 BAKER         AVA         205 N. 22ND ST.  ANYTOWN     000-00-0001
 10011013 SIMPSON       COURTNEY    205 N.22ST STREE ANYTOWN     000-00-0001
  2002163 WILLIAMS      NICOLE      205 NE 6TH ST    ANYTOWN     000-00-0001
 10011168 JAIMES        ROMAN       205 NW 12TH ST   ANYTOWN     000-00-0001
 10003779 PRESCOTT      JAMES       205 NW 178TH ST  ANYTOWN     000-00-0001
 10002240 SCHLUP        KIM         205 SE WHITMORE  ANYTOWN     000-00-0001
 10004719 CISNEROS      MARIA       205 SW 11TH AVE  ANYTOWN     000-00-0001
 10006205 VANELLA       FRANCES     205 SW PISCES TE ANYTOWN     000-00-0001
 10003472 DIAZ          JESSE       205 SW WHITMORE  ANYTOWN     000-00-0001
 10001596 BELLAND       JASON       205 WHITMORE DR  ANYTOWN     000-00-0001
  5003110 PFEIFFER      MIKE        2050 11AVE #7    ANYTOWN     000-00-0001
 10002495 CAYSON        PAMELA      2050 11TH AVE #1 ANYTOWN     000-00-0001
 10010252 WADELL        JASON       2050 11TH AVE AP ANYTOWN     000-00-0001



 F1-Next Page    F2-Prev Page   F3-AR/RTO Hist   F4-Chg   F5-Delete   F6-Add
```

**Figure 8- 3 Customer Maintenance Screen with address lookup data**

## Find a customer by driver's license number

If you want to look up a customer by driver's license number, enter the partial or entire number and press the F2 key as shown in the following example. See Figure 8-4.

```
                        Customer Maintenance                      07/12/07

Customer Name/#: 085

  Acct Nbr Last Name    First Name  Address           DL# Or City    S S A N
 ▮ 1000256 MACK         RICHARD     5824 AUVERS   BLV 085000000      000-00-0001
* 2002698 ABNEY         JOHN        PO BOX 700        085111111      000-00-0001
  1000512 WOODEN        LEROY       2801 LANGSTON     ANYTOWN        000-00-0001
  1001446 SMITH         MARY        123 ABC DRIVE     ANYTOWN        000-00-0001
  1001892 GASTON        JOHN F.     333 MELTON DR.    ANYTOWN        000-00-0001
  1002239 GARCIA        CAROLINA    603 AVE E         ANYTOWN        000-00-0001
  1002424 MCKNIGHT      SHIRLEY     3003 AVE K        ANYTOWN        000-00-0001
  1002551 ALLEN         SHEILA      2205 AVE E        ANYTOWN        000-00-0001
  1002608 HEALTHCARE    PREFERRED   2470 ATLANTIS DR  ANYTOWN        000-00-0001
  1002681 WILLIAMS      DEDREA      506 N 23RD ST     ANYTOWN        000-00-0001
  1002781 OLSEN         NANCY A.    2309 TAMARIND DR  ANYTOWN        000-00-0001
  1002787 BROWN         RICHARD     1610 AVE P.       ANYTOWN        000-00-0001
  1002853 STAFFING      CROSS COUN  2818 B STONEWAY   ANYTOWN        000-00-0001
  1003013 CURRY         TONYA       705 S 29TH ST AP  ANYTOWN        000-00-0001
  1003064 ATHANASANTOSBARBRA        184 SE CELESTIA   ANYTOWN        000-00-0001


 F1-Next Page    F2-Prev Page    F3-AR/RTO Hist    F4-Chg    F5-Delete    F6-Add
```

**Figure 8- 4 Customer Maintenance Screen with driver's license lookup data**

## *Find a customer by social security number*

To find an exact match on a social security number, enter the entire social security number with no dashes and press the F3 key. To search by last four digits of social security number, enter the last four digits and press the F3 key. To search by beginning characters of social security number, enter beginning characters followed by zeros to complete the 9-digit number (without dashes) and press the F3 key. Customers will be displayed in numerical order by the social security search option you have chosen. See Figure 8-5.

```
                          Customer Maintenance                        07/12/07

 Customer Name/#: 456000000

  Acct Nbr Last Name     First Name  Address           DL# Or City     S S A N
█ 2002831 SMITH          RON         1601 HWY 441 #10 ANYTOWN          456-00-0001
  2001396 BAKER          ADAM        4323 SE 21ST CT  ANYTOWN          456-00-0002
* 10012232 SMITH         BARNEY      123 ABC LANE     CORPUS CHRISTI   456-00-0003
* 10012234 SAKS          CHARLES     123 ABC STREET   CORPUS CHRISTI   456-00-0004
  10012223 SMITH         ADRIAN      1111 HOLLYWOOD D 111111111        456-11-1111
  10006743 SMITH         JOHN        1234 AVATAR LANE ANYTOWN          654-00-0002
  4002805 SMITH          JOHN        3215 SW REGATTA  3332211          654-00-0784
  10012219 JOE'S POOL HALL           1232 TUTOR LANE  654654654654     654-65-4654
* 10012228 HICKS         RON         1235 ABC BLVD    55552224444      888-02-2121
  10012220 SMITH         DOLLY       4444 HOLLYWOOD D 888888888        888-88-8888
* 10012227 BAKER         DEBRA       9999 HOLLYWOOD D 9999999999999    999-99-9999
  EOF



 F1-Next Page    F2-Prev Page    F3-AR/RTO Hist   F4-Chg   F5-Delete   F6-Add
```

**Figure 8- 5 Customer Maintenance Screen with social security number lookup data**

## Find a customer by account number

To find a customer by their account number, enter all or part of the account number and press the F4 key. Customers will be listed numerically in account number order. In the following example, 1000 was entered and the F4 key was pressed. See Figure 8-6.

```
                        Customer Maintenance                    07/12/07

Customer Name/#: 1000

  Acct Nbr Last Name    First Name  Address           DL# Or City   S S A N
█ 1000001 ADGER        PATRICE     2601 AVE R        ANYTOWN       000-00-0001
  1000002 BOONE        DONNA       #5 ERIE TERR.     ANYTOWN       000-00-0001
  1000003 YARBOROUGH   BETH        174 NW PEACH STR  ANYTOWN       000-00-0001
  1000004 LENDERS      ALL FLORID  1231 20TH STREET  ANYTOWN       000-00-0001
  1000005 JACOBS       DEBRA       JETSON TV & APPL  ANYTOWN       000-00-0001
  1000006 KAUFFMAN     LISA        2919 S INDIAN RI  ANYTOWN       000-00-0001
  1000007 ALLORE       ANN                           ANYTOWN       000-00-0001
  1000008 JR.          HENRY ESTR  139 NW DOREEN ST  ANYTOWN       000-00-0001
  1000009 TIMBLIN      MICHELLE                      ANYTOWN       000-00-0001
  1000010 MACALUSO     CHUCK       1255 21ST CT      ANYTOWN       000-00-0001
  1000011 YERGENDS     COURTNEY    8301 ELM PARK DR  ANYTOWN       000-00-0001
  1000012 HARRIS       JOHN        110 SW PIECE TER  ANYTOWN       000-00-0001
  1000013 BOLDEN       BARBARA     803 1/2 N. 17TH   ANYTOWN       000-00-0001
  1000016 BUCKINS      EARNESTINE  905 N.23RD.ST.AP  ANYTOWN       000-00-0001
* 1000017 DAVIS        TERESA      7695 NW HATCHES   ANYTOWN       000-00-0001


 F1-Next Page   F2-Prev Page   F3-AR/RTO Hist   F4-Chg   F5-Delete   F6-Add
```

**Figure 8- 6 Customer Maintenance Screen account number lookup data**

## Find a customer by home phone number

If you wanted to find a customer by home phone number, enter the exact home phone number including area code, using no spaces or dashes and press the F6 key. Once you have highlighted and entered a customer record, the system will bring up this customer in the New Agreement Add screen. See *page 16 in this section* to continue adding an agreement.

## Adding a new agreement to an existing customer

To add a new agreement to an existing customer, using your arrow keys, highlight the correct name and press ENTER. If before adding the new agreement, you want to look at a brief history of this customer's open and closed Agreements, press the F3 key.

If you found the right customer but you need to make any changes such as a change of address or adding a Drivers License Number or Social Security Number, press the F4 key.

Note: Do not add a new customer without checking to see if that customer is not already in the system. Try as many search possibilities as necessary until you are convinced this customer does not exist in the system.

## Adding a new customer

If the customer is not already in the computer, press the F6 key and you will be taken to the Customer Add screen, see Figure 8-7.

```
                        Customer Add                              07/12/07

   Customer/Or: █              ,                    Acct#:
  Company Name:
  Contact Name:
       Address:
Address Line 2:
Zip/City/State: 11111-0000 CORPUS CHRISTI  TX    Map Code:
Home Phone Nbr:                    Work Phone Nbr:                Ext:
Cell Phone Nbr:                   Pager Phone Nbr:
 Fax Phone Nbr:                        Birth Date:          Marketing Info
          SSAN:                 Drivers License Nbr:
       Taxable?: Y      Tax Codes   Bill To Number:
    Tax Number:
    Charge Cust: N              Retail Discount Level:
   Credit Limit:      0    Default Retail Pmt Form:
    Status Flag:       Default: Salesperson/Acct Mgr:
  Customer Type:                       RTO Recv:
 Email Address:
   Bank/CC Info:                          00/00
Default PO Nbr:               Best Time to Call:
      Enter the customer's last name or leave blank for Company Name
_____

 F1-References    F2-Employer    F3-Landlord    F4-2nd Cust    F7-Car Info
```

*Figure 8- 7 Customer Add Screen*

**CUSTOMER/OR:** Enter the customer name, last name first and press the ENTER key, then enter the first name and press the ENTER key. Use all capital letters or if this is an institution or a business, go to the next line by pressing ENTER through the customer name fields.

**ACCT#:** Press the ENTER key and the system will automatically assign the next available account number to this customer.

**COMPANY NAME:** Enter the company name. Note: Use customer name or company name but not both. Press the ENTER key.

**CONTACT NAME:** If this is a company account, enter the name of the contact person here.

**ADDRESS:** Enter their primary address.

**ADDRESS 2:** Enter additional address information in here.

**ZIP/CITY/STATE:** Enter the zip code and the city and state will fill in based on zip code. If the city and state do not fill in call or email RSSS support. You can change City and State if necessary; i.e. several cities in this zip code.

**HOME PHONE NUMBER:** This is a required field. Enter the primary phone number here. If they do not have a home phone number enter 1.

**MAP CODE:** Enter the Canadian postal map code here if applicable.

**WORK PHONE NUMBER:** This is a required field. Enter the work phone number here. If they do not have a work phone number enter 1.

**CELL PHONE NUMBER:** You may enter a cell phone number here or press enter to proceed to the next field.

**PAGER PHONE NUMBER:** You may enter a pager phone number here or press enter to proceed to the next field.

**FAX PHONE NUMBER:** You may enter a fax machine phone number here or press enter to proceed to the next field.

**BIRTH DATE:** You may enter their birth date here. Note format MM/DD/YYYY (See CPRTA for the birthday report).

**MARKETING INFO** If you have this feature, you will be required to gather marketing information from the customer when you are adding a new customer after you enter the birth date, otherwise, you will be taken on to the social security number field. See Figure 8-8.

**OWN OR RENT HOME** (O)wn or (R)ent Home
**DATE** Date Moved Into Current Address
**EDUCATION** 1) High School 2) Some College 3) Trade School 4) College Graduate
**MILES FROM STORE** 1) Less Than One 2) 2-3 3) 3-5 4) Over 5
**GENDER** (F)emale or (M)ale
**MARITAL STATUS** (S)ingle, (M)arried, (D)ivorced, or (W)idow
**RACE** (A)sian, (B)lack, (H)ispanic, (O)ther, or (W)hite
**RENTED BEFORE** Rented From Another Company? (Y)es or (N)o
**BANKRUPTCY** Filed Bankruptcy? (Y)es or (N)o
**REFERRAL NAME** If Referred By Someone, Enter Their Name
**ADV SOURCE CODE** How Did You Hear About Us? (?? To Display Selection Window for choices)
**MARKETING OPTOUT** Customer Wants to Opt-out of Receiving Marketing Info? (Y)es or (N)o
**NBR MTHLY BILLS** Number of Bills the Customer Pays Monthly
**BANK ACCOUNT NBR** Bank Account Number
**BANK NAME** Bank: 1) Bank of America 2) JPMorgan/Chase 3) Wells Fargo 4) US Bank 5) WAMU 6) Wachovia 7) Countrywide 8) Other
**BANK BRANCH LOCATION** Bank Branch Location
**ACCT TYPE** Bank Account Type (C)hecking (S)avings or (B)oth

```
                            Customer Add                           07/12/07

    Customer/Or: DOE              , JOHN              Acct#:  10012238
    Company Name:
    Contact Name:
         Address: 123 ABC
 Address Line 2:
 Zip/City/State: 11111-0000 CORPUS CHRISTI  TX    Map Code:
 Home Phone Nbr: (555)555-5555          Work Phone Nbr: (555)555-5555  Ext:
 Cell Phone Nbr:                        Pager Phone Nbr:
  Fax Phone Nbr:                              Birth Date:  1/01/2001 Marketing Info
 ╔════════════════════════════════════════════════════════════════════╗
 ║ Own or Rent Home: █  Date:                         Education:       ║
 ║ Miles From Store:                                     Gender:       ║
 ║   Marital Status:                                       Race:       ║
 ║    Rented Before:                                  Bankruptcy:      ║
 ║    Referral Name:                            Adv Source Code:       ║
 ║ Marketing OptOut:                            Nbr Mthly Bills:       ║
 ║ Bank Account Nbr:                                  Bank Name:       ║
 ║  Branch Location:                                   Acct Type:      ║
 ╚════════════════════════════════════════════════════════════════════╝
                        (O)wn or (R)ent Home

  F1-References      F2-Employer      F3-Landlord      F4-2nd Cust      F7-Car Info
```

**Figure 8- 8 Customer Add Screen with Marketing Info prompts**

**SSAN:** This is the social security number field. This is required and protected by security settings. If you do not require a social security number enter a 1 here.

**DRIVERS LICENSE NBR:** This is a required field and protected by security settings. If you do not require a driver's license number enter a 1 here. If 1 is entered for the driver's license number, the system will display this customer's city in that field on all customer search functions, i.e. Take Payments.

Note: If a Driver's License number or Social Security number other than 1 has been entered and that number is already on a customer record, the system will display the following message on the bottom of the screen: Social Security Number or Driver's License Number already on File; Continue: N, see Figure 8-8.

```
                            Customer Add                           07/12/07

    Customer/Or: DOE              , JOHN              Acct#:  10012237
    Company Name:
    Contact Name:
         Address: 123 ABC LANE
 Address Line 2:
 Zip/City/State: 11111-0000 CORPUS CHRISTI  TX    Map Code:
 Home Phone Nbr: (555)555-5555          Work Phone Nbr: (555)555-5555
 Cell Phone Nbr:                        Pager Phone Nbr:
  Fax Phone Nbr:                              Birth Date:
           SSAN: (456-00-0001)   Drivers License Nbr:
        Taxable?: Y        Tax Codes    Bill To Number:
     Tax Number:
    Charge Cust: N              Retail Discount Level:
   Credit Limit:        0    Default Retail Pmt Form:
    Status Flag:         Default: Salesperson/Acct Mgr:
  Customer Type:                         RTO Recv:
  Email Address:
   Bank/CC Info:                      00/00
 Default PO Nbr:               Best Time to Call:
(Social Security Acct Nbr Already On File;Continue: N)ccount Number

  F1-References      F2-Employer      F3-Landlord      F4-2nd Cust      F7-Car Info
```

**Figure 8- 8 Customer Add Screen**

Press the ENTER key to accept the default of N for no.  This will take you back to the "Customer Name/#" prompt.  Type in the number that was "already on file" and use the appropriate function key (F1 or F2) to find out whom already has this number.

**TAXABLE:** Is this customer or company taxable? Answer with a Y for yes or an N for No.

**TAX CODES:** If you use the Service/Repair Module you may enter a default tax code here.

**BILL TO NUMBER**  Only use this field if another party is to be billed for any accounts associated with this customer or company.  For example: ABC Company PO's are paid by ABC Enterprises, Inc., you would enter ABC Enterprises, Inc. account number here.

**TAX NUMBER**  If you answered N for no to the Taxable question above, enter the Federal Tax Id number here.  If you do not yet have a number enter a 1 here.

**CHARGE CUST**  If you will allow this customer to charge sales enter a Y for yes here.  If the customer is not allowed to charge, accept the default of N for no.

**RETAIL DISCOUNT LEVEL** You have the ability to insure this customer or company gets a discount on every sale transaction.  Leave blank for no discount or choose one of the following options
**C -** For discount on a cash sale transaction.
**D** – For discount on all sale transactions.
**A** - Discount is set at MAP price (Minimum Acceptable Price).
**O** - Discount is set at MOP Price (Manager Override Price).

In the next field you will be prompted to enter the discount percent if C or D is selected.  See the Sales Control record (SALECTRL) to determine if the discount will be off the List price or Regular Price, and to set maximum discount percentage you will allow.

**CREDIT LIMIT**  If you answered Y to allow a customer to charge enter the credit limit here, Note: Proper Security is required.  If you are using the Sales AR System and have a revolving payment form, you may set up a credit limit here.

**DEFAULT RETAIL PAYMENT FORM**  To insure an institution or business charges always go to the correct payment form you may enter it as a default here, or accept the blank default and enter to the next field.

**STATUS FLAG**  Two character free form field to enter for customer.

**DEFAULT: SALESPERSON/ACCT MGR**  Entering a salesperson number in this field will populate the salesperson field on all new rentals and sale transactions for this customer, as a default.  Entering an account manager number in this next field will also populate all

future rental and sales transaction with this number as a default in the account manager fields.

**CUSTOMER TYPE**   Default customer type for this customer.

**RTO RECV**   This field gets updated automatically by RTO Receivable transactions.

**EMAIL ADDRESS**   If the customer has an email address, enter it here.

**BANK/CC INFO**   You can store customer's credit card or debit card information here.  Enter the type of card as noted at the bottom of the screen, and then enter in the card number.  You will also be prompted to enter a valid expiration date for this card number. This information is used in the AUTOPAY program.  If you plan to use this feature, consult with RSSS support to assess what additional programming may be necessary.  **Proper security is required to access and view this field.**
**Credit Card Types:**
**VS – Visa**
**MC – Mastercard**
**DI – Discover**
**AM – American Express**
**OT – Other**
**DB – Bank Draft**

**DEFAULT PO NBR**   You can enter an open Purchase order number for this account's future Sales Accounts Receivable (AR) tickets.  Enter the word **HOLD** to prevent any billing on this account until a Purchase Order number is added to the individual AR ticket.

**BEST TIME TO CALL**   Enter the best time to contact this customer by phone.

## *Adding a reference (F1)*

Press the F1 key to add references on this account.  You will see a screen similar to Figure 8-9.  You can enter up to six different references.  Note: F9 on first screen of the three screens and F9 thru the second screen of the three screens to save the entered information.

```
                                  ┌─────────────────────────────────────┐07
                                  ║ Name: DOE              , JANE        ║╖
    Customer/Or: DOE              ║  Add: 456 ABC LANE                   ║║
   Company Name:                  ║ Add2:                                ║║
   Contact Name:                  ║ City: CORPUS CHRISTI  TX 11111-      ║║
        Address: 123 ABC LANE     ║  Ph: (111)111-1111   Map Code:       ║║
  Address Line 2:                 ║  Rel: SISTER                         ║║
Zip/City/State: 11111-0000 C      ║    Name: SMITH           , ROGER     ║║
Home Phone Nbr: (555)555-555      ║     Add: 789 XYZ LANE                ║║
 Cell Phone Nbr:                  ║    Add2:                             ║║
 Fax Phone Nbr:                   ║    City: CORPUS CHRISTI  TX 11111-   ║║
          SSAN: 456-00-0001       ║     Ph: (222)222-2222    Map Code:   ║║
       Taxable?: Y       Tax      ║     Rel: BUSINESS PARTNER            ║║
    Tax Number:                   ║ Name: █              ,              ║║
   Charge Cust: N                 ║  Add:                                ║║
  Credit Limit:        0          ║ Add2:                                ║║
   Status Flag:        Defaul     ║ City: CORPUS CHRISTI  TX 11111-      ║║
 Customer Type: O                 ║  Ph:                 Map Code:       ║║
 Email Address:                   ║  Rel:                                ║║
  Bank/CC Info:                   ╙─────────────────────────────────────╜║
Default PO Nbr:                   └─────────────────────────────────────┘
                       Last name for this reference

  F8-Backout          F9-Second Page        F10-Exit        ENTER-Next Field
```

**Figure 8- 9 Customer Add Screen – F1 References section**

## Adding an employer (F2)

Press the F2 key and you will be able to add their employer's name, address and any pertinent comments. See Figure 8-10.

```
                         Customer Add                             07/13/07

   Customer/Or: DOE           , JOHN            Acct#:  10012243
  Company Name:
  Contact Name:
       Address: 123 ╓─────────────────────────────────────────────────╖
Address Line 2:     ║                Work Information                   ║╖
Zip/City/State: 1111║                                                  ║║
Home Phone Nbr: (555║        Company: XYZ CORP.                         ║║
Cell Phone Nbr:     ║            Add: 111 ABC LANE                      ║║
 Fax Phone Nbr:     ║           Add2:                                   ║║
          SSAN: 456-║           City: CORPUS CHRISTI   TX  11111-       ║║
       Taxable?: Y  ║                            Map Code:              ║║
    Tax Number:     ║        PayDays: 15TH&30TH         Frequency: B    ║║
   Charge Cust: N   ║         Income:  40,000.00   Full/Part Time: F    ║║
  Credit Limit:     ║          Shift: NO           Date Employed:  1/01/01║║
   Status Flag:     ║       Position: MANAGER                           ║║
 Customer Type: O   ║     Supervisor: ROGER DOE                         ║║
 Email Address:     ║        Comment: █                                 ║║
  Bank/CC Info:     ╙──────────────────────────────────────────────────╜║
Default PO Nbr:      ╙─────────────────────────────────────────────────╜
           Miscellaneous notes(department,supervisor,extension,etc.)

 F8-Backout         F9-Update Record        F10-Exit         ENTER-Next Field
```

**Figure 8-10 Customer Add Screen – F2 Employer section**

## Adding a Landlord (F3)

Press the F3 key and you will be able to add student information. You can enter the school the student attends, teacher information, and other credit or bank card information. You can also note if the student lives at a different address and who the custodial parent is. You may add up to six students on a customer record. See Figure 8-11.

```
                         Customer Add                             07/13/07

   Customer/Or: DOE           , JOHN            Acct#:  10012243
  Company Name:
  Contact Name:    ╓────────────────────────────────────────────────────╖
       Address: 123 A║              Landlord Information                 ║╖
Address Line 2:      ║                                                   ║║
Zip/City/State: 11111║       Apt:                                        ║║
Home Phone Nbr: (555)║       Mgr:                                        ║║
Cell Phone Nbr:      ║                 Or Landlord's Name                ║║
 Fax Phone Nbr:      ║      Name:                    ,                    ║║
          SSAN: 456-0║                                                   ║║
       Taxable?: Y   ║ Monthly Pmt:   1,400.00                           ║║
    Tax Number:      ║ Mortgage Co: J & B MORTGAGE                       ║║
   Charge Cust: N    ║         Add: 333 J & B PARKWAY                    ║║
  Credit Limit:      ║        Add2:                                      ║║
   Status Flag:      ║        City: CORPUS CHRISTI   TX 11111-           ║║
 Customer Type: O    ║          Ph: (333)333-3333  Map Code: █           ║║
 Email Address:      ╙──────────────────────────────────────────────────╜║
  Bank/CC Info:       ╙────────────────────────────────────────────────╜
Default PO Nbr:              Best Time to Call: AFTER 5
                         Landlord's map codes

 F8-Backout         F9-Update Record        F10-Exit         ENTER-Next Field
```

**Figure 8-11 Customer Add Screen – F3 Landlord section**

## *Adding a second customer (F4)*

Press the F4 key to add spouse, roommate or significant other information if required, see Figure 8-12.

```
                             Customer Add                        07/13/07

    Customer/Or: DOE              , JOHN              Acct#:  10012243
   Company Name:
   Contact Name:
       Address: 123 ABC LANE╔════════════ Second Customer Info ═══════════╗
 Address Line 2:            ║                                             ║
Zip/City/State: 11111-0000 C║ Name: DOE                 , WANDA           ║
Home Phone Nbr: (555)555-555║  Add: 123 ABC LANE                         ║
 Cell Phone Nbr:            ║ Add2:                                       ║
 Fax Phone Nbr:             ║ City: CORPUS CHRISTI   TX  11111-           ║
          SSAN: 456-00-0001 ║   Ph: (555)555-5555          Map Code:      ║
      Taxable?: Y       Tax ║ W Ph: (555)555-5555                         ║
    Tax Number:             ║ SSAN: 456-00-0002  DL#: 1                   ║
   Charge Cust: N           ║  Rel: WIFE                                  ║
  Credit Limit:        0    ║ BDte:  2/02/1980                            ║
   Status Flag:      Defaul ╚═════════════════════════════════════════════╝
 Customer Type: O
 Email Address:
  Bank/CC Info:                          00/00
Default PO Nbr:              Best Time to Call: AFTER 5
                         Last name for this customer

 F8-Backout          F9-Update Record          F10-Exit        ENTER-Next Field
```

**Figure 8-12 Customer Add Screen – F4 Second Customer section**

## *Adding car information (F7)*

Press the F7 key to add information on the customer's vehicle if required, see Figure 8-13.  You may enter information on up to two vehicles for this customer.  After each entry press the F9 key when you are done.

```
                             Customer Add                        07/13/07

    Customer/Or: DOE              , JOHN              Acct#:  10012243
   Company Name:
   Contact Name:
       Address: 123 AB╔═══════════════ Car Information ═══════════════╗
 Address Line 2:       ║                                               ║
Zip/City/State: 11111-║     License: 123ABC                            ║
Home Phone Nbr: (555)5║     VIN Nbr: 1ABCDEF2GHIJKL345MNOPQRST          ║
 Cell Phone Nbr:       ║        Year: 2005                             ║
 Fax Phone Nbr:        ║        Make: VOLKSWAGEN                       ║
          SSAN: 456-00║        Model: JETTA                            ║
      Taxable?: Y      ║        Desc: BLACK                            ║
    Tax Number:        ║                                               ║
   Charge Cust: N      ║        Lien: ABC BANK                         ║
  Credit Limit:        ║     Phone #: (444)444-4444                    ║
   Status Flag:        ║     Pmt Amt:      400.00 per  M               ║
 Customer Type: O      ║ Purchase Date:  3/03/05                       ║
 Email Address:        ╚═══════════════════════════════════════════════╝
  Bank/CC Info:
Default PO Nbr:              Best Time to Call: AFTER 5
                         License Plate Number

 F8-Backout          F9-Second Page          F10-Exit        ENTER-Next Field
```

**Figure 8-13 Customer Add Screen – F7 Car Information section**

Once all the information has been entered for this customer, press the F9 key and the prompt "Any More Changes: N" will be displayed, see Figure 8-14.

```
                          Customer Add                          07/13/07

   Customer/Or: DOE              , JOHN              Acct#:  10012243
   Company Name:
   Contact Name:
        Address: 123 ABC LANE
Address Line 2:
Zip/City/State: 11111-0000 CORPUS CHRISTI  TX    Map Code:
Home Phone Nbr: (555)555-5555          Work Phone Nbr: (555)555-5555  Ext:
Cell Phone Nbr:                        Pager Phone Nbr:
 Fax Phone Nbr:                          Birth Date:  1/01/1979 Marketing Info
          SSAN: 456-00-0001    Drivers License Nbr: 1
       Taxable?: Y       Tax Codes    Bill To Number:
    Tax Number:
    Charge Cust: Y              Retail Discount Level:
   Credit Limit:   3,000    Default Retail Pmt Form:   1
    Status Flag:       Default: Salesperson/Acct Mgr:    1
  Customer Type: O                      RTO Recv:
  Email Address: johndoe@hotmail.com
  Bank/CC Info: OT 12345679812345678912345 01/09
Default PO Nbr:                   Best Time to Call: AFTER 5PM
Any More Changes: N

 F1-References     F2-Employer     F3-Landlord     F4-2nd Cust     F7-Car Info
```

***Figure 8-14 Customer Add Screen with data completed***

If you need to go back into the data to make changes, press Y for yes and make your changes. If not, press the ENTER key to accept the default of N for no. You will now see a window open, see Figure 8-15.

```
                          Customer Add                          07/13/07

   Customer/Or: DOE              , JOHN              Acct#:  10012243
   Company Name:
   Contact Name:
        Address: 123 ABC LANE
Address Line 2:
Zip/City/State: 11111-0000 CORPUS CHRISTI  TX    Map Code:
Home Phone Nbr: (555)555-5555          Work Phone Nbr: (555)555-5555  Ext:
Cell Phone Nbr:                        Pager Phone Nbr:
 Fax Phone Nbr:                          Birth Date:  1/01/1979 Marketing Info
    ┌───────────────────────────────────────────────────────────────┐
    │ FREE FORM MISCELLANEOUS COMMENTS CAN BE ENTERED HERE.  THESE COMMENTS │
    │ WILL NOT PRINT ON ANY REPORT BUT WILL DISPLAY ON THE SCREEN.█  │
   C│                                                               │
  Cr│                                                               │
   S│                                                               │
 Cus│                                                               │
 Ema│                                                               │
 Ban└───────────────────────────────────────────────────────────────┘
                  Enter Comment, and press F9 when done


 F1-Fwrd F2-Back F9-Done F10-Abort HOME-Top PG DN-Del Line PG UP-Ins Line
```

***Figure 8-15 Customer Add Screen with open window for comments***

You may enter up to 50 lines of miscellaneous comments (this is a free form area). These comments will not print on any report but will display on the screen. When you have finished entering your comments, press the F9 key.

## *Adding a new rental agreement*

When you are adding a new rental agreement to an existing customer, you will see a screen similar to Figure 8-16.

```
                         New Agreement Add                          07/13/07

Customer Name: DOE              , JOHN              Acct#:  10012243

Salesmen Nbrs: █                        Agreemnt Nbr:
 Acct Mgr Nbr:                          Agreemnt Date:   7/13/07
    Store Nbr:    1                      Delivery Date:   7/13/07
       Source:                              Cust Type:       O
Agreemnt Type:                            Pmt Terms:
     Tax Code:                            Ticket Nbr:
  Ticket Type:   O                       # BOR Items:
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt




          Enter the salesman who sold this agreement; enter to list

 F5-Help                     F8-Backout                          F10-Exit
```

*Figure 8-16 New Agreement Add Screen*

**SALESMAN NBRS**   Enter the employee or salesperson number who will receive the credit for initiating this rental agreement. If you do not know the salesperson's employee number, press the ENTER key and a window will open with a listing of existing employee names and corresponding numbers. Using your arrow keys, highlight the person you want, and press the ENTER key. There is room for three different employee numbers if more than one person worked on this agreement. In the second and third salesperson area, enter 99999 to initiate the list as noted at the bottom of the screen.

**AGREEMENT NBR**  You may enter in an agreement number if your Rental Agreements are preprinted with a number, otherwise press ENTER.

**ACCT MGR NBR**   This field will populate with the first salesperson number selected above. If someone else is responsible for monitoring this agreement, press the space bar for a listing of available account managers, or if you know the number, type it in here and the press the ENTER key. Note: To set up an employee as an account manager, go to employee maintenance (EMPMNT).

**ENTERED DATE**   Defaults to the current system date. Press ENTER to accept the default.

**STORE NBR**  This will default to your store number. Press ENTER.

**DATE WRITTEN**   Defaults to the current system date. Press enter to accept the default or enter the date the agreement was actually written. Use MMDDYY format and press ENTER.

**SOURCE**       Enter the advertising source associated with this rental contract.  Press enter for a listing of available codes.  Using the arrow keys, highlight the one you want to use and press ENTER.  In the second and third source code area enter 99 to initiate a list as noted at the bottom of the screen.

**CUST TYPE**    This prompt is populated from the default customer type in the customer's record.  Press enter to accept the default or press the space bar for a listing of available customer types and choose one from the list.

**AGREEMENT TYPE**  Enter the type of agreement or press the space bar for a listing of agreement types.  Highlight the correct agreement type for this rental and press ENTER.  Note: The default term for monthly agreement is M.  The default for weekly agreement types is W.  These are noted in the agreement type listing on the right.

**AGREEMENT LENGTH** If a Z is entered in agreement type you will be prompted to enter in the length or "term" to ownership, Example enter an 18 here if there are 18 monthly payments required to purchase these items.

**PMT TERMS** Defaults to correspond with the agreement you have chosen.  Press enter to accept the default or press the space bar for a listing of terms available.  Note: Monthly agreement types have term options of M-monthly, S-semi-monthly, Q-quarterly, A-semi-annually, Y-yearly.  Weekly agreement types have term options of W-weekly, B-bi-weekly, D-daily.

**TAX CODE**     Enter to accept the default.  Note: If you have a unique sales tax situation, consult with an application support specialist at RSSS.

**TICKET NBR** The system will assign the next available ticket number.  Press ENTER.

**TICKET TYPE**       The system default is **O** for rent to own of a serialized item Press the ENTER key and accept the default and assign a serial number to this ticket or press the space bar for a listing of available types.  Available types are:
      **S** - will allow you to choose a stock item without assigning a serial number.
      **F** - will allow you to choose a fee ticket.  Choose club fee for a club program fee ticket or other fee.
      **R** - for rent to rent (short term rentals).
      **T** - for special order rent to rent (short term rental).

**# BOR ITEMS**       No longer used.  Press ENTER.

The cursor will now be at the prompt: "Any Changes: N". If no changes are necessary, press ENTER to continue and the cursor will move to the Serial Nbr field.

## *For items in stock*

If the serial number(s) is known, enter the number. If the serial number(s) is not known press the F1 key as seen in Figure 8-17 and you will see the Inventory Maintenance Screen as seen in Figure 8-18.

```
                            New Agreement Add                    07/13/07

Customer Name: DOE            , JOHN              Acct#:   10012243

Salesmen Nbrs:    1                     Agreemnt Nbr:
  Acct Mgr Nbr:  901                    Agreemnt Date:   7/13/07
     Store Nbr:    1                    Delivery Date:   7/13/07
        Source:  TV                        Cust Type:        O
 Agreemnt Type:   A                        Pmt Terms:        W
      Tax Code:                           Ticket Nbr:   10040922
   Ticket Type:   O                      # BOR Items:
    Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
          █




 F1-List Inventory        F2-Get By Model #        F5-Help        F8-Backout
```

***Figure 8-17 New Agreement Add Screen F1 to list inventory***

```
                            Inventory Inquire                    07/13/07
   Start Key: FB█
      Select:    Loc & Stat:          Desc:
       Color:       Fab/Mat:    Primary Color:    Primary Fab/Mat:








 Enter the information to search for (wildcard is available for model numbers)

   Start By:   F3-Model Num   F4-Bar Code Num   F6-Serial Num
```

***Figure 8-18 Inventory Inquiry Screen***

The cursor will be on the start key. You can search available inventory by model number (F3), serial number (F6) or bar code number (F4). Enter the search criteria and press the corresponding function key (the options are listed on the bottom of the screen). In this example a partial model number FB (Furniture Bedroom) is entered and the F3 key was pressed to list available serial numbers in model number order. See Figure 8-19. Using the arrow keys highlight the item you wish to select for this agreement and press ENTER.

```
                        Inventory Inquire                     07/13/07

   Start Key: FB
      Select:    Loc & Stat:          Desc:
      Color:       Fab/Mat:        Primary Color:     Primary Fab/Mat:
Model Number  Serial Nbr Description      Color           Fab/Mat       Loc S
FBASH216      50143      BEDROOM SET                                     1 N
FBCOA3998     48429      BEDROOM SET                                     6 N
FBCOA5991     48432      BEDROOM SET                                     3 R
FBCOA5991     48433      BEDROOM SET                                     3 R
FBHHW2100     50087      BEDROOM SET                                     3 N
FBSEM10-2400  49693      BEDROOM                                         3 N
FBSEM10-2400  49822      BEDROOM                                         2 N
FBSEM10-2400  49913      BEDROOM                                         4 N
FBSEM1910     50049      BEDROOM                                         2 N
FBSEM2100     48103      BEDROOM SET                                     3 R
FBSEM2300     49543      BEDROOM                                         4 N
FBSEM2300     49869      BEDROOM                                         2 N
FBSEM2800     48725      BEDROOM                                         2 R
FBSEM282      49558      BEDROOM                                         3 N

                  Second Description: 5PC BLK GATOR

        F1-Next Page   F2-1st Page   F8-Prev Menu   CMD-Exit
```
*Figure 8-19 Inventory Inquiry Screen with data listed*

The selected item's serial number will be placed under Serial Nbr on the screen. If this is the correct one, press ENTER. Enter the rental rate before fees and taxes under the Pmt Amt or accept the default payment amount. Note: Default rental pricing can be set up in item maintenance (ITEMMNTS) or by product code or description. Enter to Cash Selling Price. Enter the cash selling price for this item for this agreement or press ENTER to accept the default. Enter to the next serial number field. See Figure 8-20.

```
                        New Agreement Add                     07/13/07

Customer Name: DOE           , JOHN           Acct#:  10012244

Salesmen Nbrs:     1               Agreemnt Nbr:
 Acct Mgr Nbr:    901              Agreemnt Date:    7/13/07
    Store Nbr:     1               Delivery Date:    7/13/07
       Source:    TV                 Cust Type:         O
Agreemnt Type:    A                  Pmt Terms:         W
    Tax Code:                        Ticket Nbr:    1040922
  Ticket Type:    O               # BOR Items:
  Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
  48429        2.67                      ACAMA0001   21.99




      Enter a serial number or one of the function key options listed below

 F1-List Inventory      F2-Get By Model #      F5-Help      F8-Backout
```
*Figure 8-20 New Agreement Add Screen with data*

If no amount is visible or the amount displayed is not the amount you rented it for, enter the payment you rented this item for (without tax, grp, etc) in the Pmt Amt field. **Make sure the payment amount is correct based on the Agreement Type and Pmt Terms you set up.**

Spiff is the amount your company will pay the salesperson who rented this item.

ESP is for Extended Service Policy.  If an Extended Service Policy was written with this agreement, enter the amount the customer pays with each payment for ESP.

Cash Selling Price window will also display.  Press ENTER through it if there are no changes to the selling price (security authorization is required to change the selling price).

Continue on this way until you have all items entered.  You may enter up to 14 items on a rental agreement.

Press the F9 key when you have completed all your entries.  The prompt "Any More Changes: N" will appear.   Review this screen and press the ENTER key to accept the default of N for no to proceed to the next screen.  See Figure 8-21.

```
                             New Agreement Add                    07/13/07

Customer Name: DOE              , JOHN              Acct#:  10012244

 Rate Of Pmt:      24.66     Rate Of Grp:      3.70     Rate Of ESP:      0.00
 Rate Of Tax:                Ttl Reg Due:             Next Pmt Due:
Agreemnt Amt:  1,923.48     Agreemnt Bal:  1,923.48    Balloon Pmt:
Delivery Amt:               1st Pmt Amt:               GRP/ESP Amt:
 Deposit Amt:                  Proc Fee:                   Tax Amt:
   Total Due:       0.00         Pmt 1:    /                 Pmt 2:    /
   Pmt Terms: W  78 Wks   Amt Received:                  Change Due:      0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   48429          2.67                    ACAMA0001    21.99




            Amount of payment (only) expected on all future payments

 F3-Calc Amt/Date      F4-Calc Date/Amt      F5-Help      F8-Backout      F10-Exit
```

*Figure 8-21 New Agreement Add Screen payment amount screen*

***This information will establish how this customer will pay from now on.***

**RATE OF PMT**   This field is automatically calculated based on the total rate previously set up when you entered the inventory items.  Press ENTER. You can enter a total payment rate here and each individual rate will be adjusted.

**RATE OF GRP**   GRP is Guaranteed Replacement Program, or waiver of liability or insurance.  This field is calculated based on a GRP formula previously set up by your company.  This entry may be changed if security allows you to.  Some companies are set up to input data into this field.

**RATE OF ESP**   Automatically calculated from the amounts you entered when you added the customer's inventory records.

**RATE OF TAX**   This is automatically calculated for you if the controls have been set up in RENTCTRL. .

**TTL REG DUE**      This is calculated automatically.  This is a combination of the Rate of Pmt, Rate of GRP, Rate of ESP and Rate of Tax.  This will be the recurring total regular payment for this agreement and will be the amount the computer expects to get from now on as a regular payment.

**NEXT PAYMENT DUE**      Enter the date the customer's next payment is due.  Press ENTER.

**AGREEMENT AMT**    Automatically calculated (Payment amount x Payment Terms).  Press ENTER.

**AGREEMENT BAL**    This is the agreement balance (same as agreement amount) and is calculated for you.  Press ENTER.

**BALLOON PMT**     Enter the Balloon Pmt due at the end of the agreement.  (This is an option.  Not all companies use this).  Press ENTER.

***This information is to post the amount of money you have collected <u>TODAY</u>***.

**DELIVERY AMT**     If there was a charge for delivery, enter it here and press ENTER.

**1ST PMT AMT**     Enter the amount the customer paid you today (Rent Only) for their first payment.  This figure will be reduced from the agreement amount when the transaction is completed.  Press ENTER.

**GRP/ESP AMT**     Enter the amount of GRP to be charged as part of this first payment collected <u>TODAY</u>, press ENTER.  Enter the amount of ESP to be charged as part of this first payment collected <u>TODAY</u>, press ENTER.

**DEPOSIT AMT**     If you charge a security deposit, enter it here.  Press ENTER.

**PROC FEE**    Enter the processing fee.  This can be used for such things as processing fees or any other miscellaneous charges.  Press ENTER.

**TAX AMT**    This is automatically calculated for you if the controls have been set up in RENTCTRL .  Press ENTER.

**TOTAL DUE**    This is the total of all the fields you have entered starting with Delivery Amt.  This amount is what you should have collected from this customer.  If this does not match the amount you have collected, you will not balance in the cash drawer.

**PMT 1 / PMT 2**     You can take two different types of payment.  For example, perhaps the customer has a coupon for a certain amount off and wants to pay part cash/check and use the coupon for the rest.  The options will be displayed in a window by pressing ENTER.  To select one of these options, using the arrow keys, highlight the one you want to use and press ENTER.  If you need to enter the second payment type, enter the amount and the second payment type also.  Press ENTER.

**PMT TERMS**  This information is carried over from previous screen.

**AMT RECEIVED**     Enter the amount of money the customer hands you.  Press ENTER.

**CHANGE DUE**     This field will automatically calculate the change to give your customer.

Once you have filled in all the information, press the F9 key.  You will be prompted "Any Changes: N", see Figure 8-22.

```
                        New Agreement Add                      07/07/05

Customer Name: SAKS            , CHARLES          Acct#:    511975

 Rate Of Pmt:      20.00    Rate Of Grp:      2.00    Rate Of ESP:      0.00
 Rate Of Tax:       1.12    Ttl Reg Due:     23.12    Next Pmt Due:   8/07/05
Agreemnt Amt:      20.00    Agreemnt Bal:    20.00    Balloon Pmt:
Delivery Amt:              1st Pmt Amt:      20.67    GRP/ESP Amt: 2.00
 Deposit Amt:              Proc Fee:      3.00      Tax Amt:      1.16
   Total Due:      26.83       Pmt 1:  1/   10.00       Pmt 2:  4/   16.83
   Pmt Terms: M   1 Mths  Amt Received:     26.83    Change Due:      0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   F13067       20.00




Any Changes: N
_____

 F3-Calc Amt/Date     F4-Calc Date/Amt     F5-Help    F8-Backout     F10-Exit
```

*Figure 8-22 New Agreement Add Screen with complete data entered*

If you have no changes, press the ENTER key.

The following prompts may display as you work to complete the agreement transaction:

You may receive a prompt for either weekly or monthly terms.  If you have the security clearance to change the amount and terms here, you can, otherwise press ENTER through the two fields.  You will now see a prompt "Cash Selling Price".

Verify that the cash selling price is correct and press the ENTER key.  There is a possibility you may change this field if you have authority to do so.

You will again be prompted with "Any Changes: N".  Press ENTER if no more changes.

A prompt on the bottom will be displayed asking if you want to "Transfer Inv Loc: Y". The answer to this should be yes so press the ENTER key.

It will then prompt you with "New Inventory Location".  Enter the location code for the customer's home and press the ENTER key or press ENTER to accept the default.

You will now be prompted for "Del Notes".  This field is used to write any delivery notes.  These will be printed on the "Delivery Ticket" which will print right after the receipt.  You are prompted to enter "Delivery Note 1".  Enter any information needed here for the delivery ticket and press ENTER.  You are prompted to enter "Delivery Note 2".  Enter any information needed here for the delivery ticket and press ENTER.

You will then be prompted with "Any Changes: N".  Press the ENTER key if there are no more changes to this new agreement.  An N for no to this question will print a receipt and delivery ticket.

**Recommendations for "Delivery Note" field:**  Type regular payment amount and next due date here as another reminder to your customer on delivery (please note that this field is limited to 60 characters for each line).  The Delivery Ticket will have a place for the Delivery person's signature and the customer's signature in most cases.

You will then be prompted with "Any Changes: N".  Press the ENTER key if there are no more changes to this new agreement.  An "N" to this question will print a receipt and delivery ticket.

**PRINT AGREEMENT**          Press the ENTER key to accept the default of Y for yes to print the agreement or enter an N for no if you do not want to print the agreement.  Press the ENTER key.  Note: The contract name has to be identified in the rent control record (RENTCTRL) for an agreement to print.  See Figure 8-23.

```
                          New Agreement Add                    07/13/07

 Customer Name: DOE            , JOHN              Acct#:  10012244

  Rate Of Pmt:      24.66     Rate Of Grp:      3.70    Rate Of ESP:      0.00
  Rate Of Tax:       2.03     Ttl Reg Due:     30.39    Next Pmt Due:   7/20/07
 Agreemnt Amt:   1,923.48     Agreemnt Bal:  1,923.48   Balloon Pmt:
 Delivery Amt:                1st Pmt Amt:     24.66    GRP/ESP Amt: 3.70
  Deposit Amt:                   Proc Fee:      5.00         Tax Amt:      2.03
    Total Due:      35.39        Pmt 1:   1/    35.39          Pmt 2:    /
   Pmt Terms: W  78 Wks    Amt Received:      35.39     Change Due:       0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   48429          2.67                   ACAMA0001     21.99




  Print Agreement: Y



 _____
 F3-Calc Amt/Date       F4-Calc Date/Amt       F5-Help     F8-Backout      F10-Exit
```

*Figure 8-23 New Agreement Add Screen Print Agreement? prompt*

Depending on your rent control record settings (RENTCTRL), the following prompt may appear, "**Would you like to post a sale?**"  See Figure 8-24.

```
                              New Agreement Add                           07/13/07
Customer Name: DOE            , JOHN                    Acct#:   10012244

  Rate Of Pmt:       24.66    Rate Of Grp:       3.70    Rate Of ESP:       0.00
  Rate Of Tax:        2.03    Ttl Reg Due:      30.39    Next Pmt Due:   7/20/07
Agreemnt Amt:    1,923.48    Agreemnt Bal:   1,923.48    Balloon Pmt:
Delivery Amt:                 1st Pmt Amt:      24.66    GRP/ESP Amt: 3.70
 Deposit Amt:                    Proc Fee:       5.00        Tax Amt:       2.03
   Total Due:       35.39        Pmt 1:  1/    35.39        Pmt 2:     /
   Pmt Terms: W   78 Wks    Amt Received:      35.39     Change Due:       0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt    Serial Nbr  Pmt Amt  Spiff  ESP Amt
   48429          2.67                     ACAMA0001     21.99




                    Would you like to post a sale? N



  F3-Calc Amt/Date       F4-Calc Date/Amt      F5-Help     F8-Backout      F10-Exit
```

***Figure 8-24 New Agreement Add Screen Post a Sale? prompt***

If you enter a Y for yes, you will be taken to a Sales Entry Screen to post a sale or sales items, see Figure 8-25.

```
Store:      1                   Sales Entry  D                         7/13/07
 Name: DOE              , JOHN             Acct#:   10012244   H Ph: (555)555-5555
  Add: 123 ABC LANE                                           W Ph: (555)555-5555
 City: CORPUS CHRISTI   TX 11111   License: 1                 SSAN 456-00-0001
Comment:












Right Cust:   Y
                           Enter an "N" or a "Y"
  F1-Cust Chgs    F3-Prev Tickets    F5-Help    F6-Comment    F8-Backout    F9-Done
```

***Figure 8-25 Sales Entry Screen***

If you enter an N for no, you will be returned to the Customer Maintenance screen, see Figure 8-26.

```
                            Customer Maintenance                    07/13/07
Customer Name/#: █_____




















   F1-Address   F2-Drvrs Lic   F3-SSAN   F4-Acct Nbr   F5-Help   F6-Find by Phone#
```

**Figure 8-26 Customer Maintenance Screen**

Enter the next new agreement or press the F8 key to back out and return to the menu.

## Stock Rental

To process a rental without a specific serial number, follow the steps starting on page 16 until you get to the prompt "Ticket Type".  Press the space bar for a list of choices shown in Figure 8-27.

```
                              New Agreement Add                     07/13/07

 Customer Name: SAKS           , CHARLES           Acct#:  10012234

 Salesmen Nbrs:     1                    Agreemnt Nbr:
  Acct Mgr Nbr:   901                    Agreemnt ┌─────────────────────────────┐
     Store Nbr:     1                    Delivery ║ O  Rent To Own              ║
        Source:   TV                         Cust ║ S  Special Order            ║
 Agreemnt Type:    A                        Pmt T ║ F  Fee Ticket               ║
      Tax Code:                             Ticket║ R  Rent To Rent             ║
   Ticket Type:                            # BOR I║ T  RTR Special Order        ║
    Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial  ║                             ║
                                                   ║                             ║
                                                   ║                             ║
                                                   ║                             ║
                                                   ║                             ║
                                                   ║                             ║
                                                   ║                             ║
                                                   ║                             ║
                                                   └─────────────────────────────┘

        Enter an (O) for a Rent-To-Own agreement; space bar to list choices

 F10-Exit                                                        ENTER-Select
```

**Figure 8-27 Stock Rental Ticket Type Screen**

Choose "S" for Special Order, and press ENTER until your cursor is below the serial number field; then press the F4 key Stock Orders.  See Figure 8-28.

```
                              New Agreement Add                    07/13/07

Customer Name: SAKS             , CHARLES            Acct#:  10012234

Salesmen Nbrs:     1                     Agreemnt Nbr:
 Acct Mgr Nbr:    901                    Agreemnt Date:    7/13/07
    Store Nbr:    1                      Delivery Date:    7/13/07
       Source:   TV                          Cust Type:          O
Agreemnt Type:    A                          Pmt Terms:          W
     Tax Code:                             Ticket Nbr:   10040924
  Ticket Type:    S                       # BOR Items:
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
       ▮




        Enter a serial number or one of the function key options listed below

 F1-List InventoryF2-Get By Model #F3-Special OrderF4-Stock OrderF5-HelpF6-Pkg
```

**Figure 8-28 Stock Order F4 key Screen**

After pressing the F4 key for Stock Orders, the screen will appear as in Figure 8-29.

```
                              New Agreement Add                    07/13/07

Customer Name: SAKS             , CHARLES            Acct#:  10012234

Salesmen Nbrs:     1                     Agreemnt Nbr:
 Acct Mgr Nbr:    901                    Agreemnt Date:    7/13/07
    Store Nbr:    1                      Delivery Date:    7/13/07
       Source:   TV                          Cust Type:          O
Agreemnt Type:    A                          Pmt Terms:          W
     Tax Code:                             Ticket Nbr:   10040924
  Ticket Type:    S                       # BOR Items:
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt




Model Nbr:                    Fabric:        Color:
    Fabric:                                  Color:

 F1-Inv On Hand                 F8-Abort                      F10-Exit
```

**Figure 8-29 Stock Order Screen**

Enter the model number of the item you will be renting out or enter a few characters of the model number to choose from a list of current model numbers. See Figure 8-30. Using your arrow keys, highlight the model number you need, and press ENTER.

```
                         New Agreement Add                      07/13/07

Customer Name: SAKS              , CHARLES          Acct#:  10012234

 ┌────────────────────────────────────────────────────────────────────┐
 ║FLASH3205           LIVING ROOM                 S/L PORT GRANITE     ║┐
 ║ FLASH4030588/35    LIVING ROOM                 REC S/L BALTIC BLUE  ║║
 ║ FLASH4050838       LIVING ROOM                 S/R BARLETTA TAUPE   ║║
 ║ FLASH4100055/56/77 LIVING ROOM                 3PC BLK SECTIONAL    ║║
 ║ FLASH433477S       LIVING ROOM                 3PC SEC MANHATTAN SANDSTON║║
 ║ FLASH43377B        LIVING ROOM                 3PC SECT MANHATTAN BLK ║║
 ║ FLASH4660377       LIVING ROOM                 3PC SONOMA BROWN     ║║
 ║ FLASH4661477       LIVING ROOM                 3PC SEC/SONOMA/GALAXY ║║
 ║ FLASH50553         LIVING ROOM                 S/L DURAPELLA/COCOA  ║║
 ║ FLASH5140016       LIVING ROOM                 LAF CHAISE QUARTZ    ║║
 ║ FLASH5140038       LIVING ROOM                 S/L SOUTHPOINT QUARTZ ║║
 ║                                                                     ║║
 └────────────────────────────────────────────────────────────────────┘


Model Nbr:  FL                  Fabric:       Color:
      Fabric:                              Color:
 ─────────────────────────────────────────────────────────────────────
  F1-Forward        F2-Back        F6-Add Item        F10-Exit      ENTER-Select
```

**Figure 8-30 Stock Order Screen model number lookup**

If the model number does not exist in the system and you have the security to do so, press the F6 key to add the item following the instructions in Item Maintenance (ITEMMNTS).  Once you have entered the correct model number, enter through the Fabric and Color fields until your cursor is at the Payment Amount field, see Figure 8-31.  Continue with the rental as shown in pages 19-27 of this section.

```
                         New Agreement Add                      07/13/07

Customer Name: SAKS              , CHARLES          Acct#:  10012234

Salesmen Nbrs:     1                   Agreemnt Nbr:
 Acct Mgr Nbr:    901                  Agreemnt Date:    7/13/07
    Store Nbr:     1                   Delivery Date:    7/13/07
       Source:    TV                      Cust Type:          O
Agreemnt Type:     A                      Pmt Terms:          W
     Tax Code:                            Ticket Nbr:   10040924
  Ticket Type:    S                      # BOR Items:
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   STOCK          46.67




   Model Nbr: FLASH433477S      Desc: LIVING ROOM                     Loc:
                  Enter the rate of payment for this item
 ─────────────────────────────────────────────────────────────────────
  F1-List InventoryF2-Get By Model #F3-Special OrderF4-Stock OrderF5-HelpF6-Pkg
```

**Figure 8-31 Stock Order Screen**

To attach the serial number to this ticket later, refer to instructions in *Chapter 5 Transferring Inventory pages 16-21*.

## Special Order Items

If the inventory is not in stock and you are going to order it for the customer, at "Ticket Type", enter "S" for Special Order. When the cursor is below the prompt "Serial Number", press the F3 key. The screen will resemble Figure 8-32.

```
                              New Agreement Add                         07/13/07

Customer Name: SAKS            , CHARLES            Acct#:  10012234

Salesmen Nbrs:     1                       Agreemnt Nbr:
 Acct Mgr Nbr:   901                       Agreemnt Date:   7/13/07
    Store Nbr:    1                        Delivery Date:   7/13/07
       Source:   TV                            Cust Type:        O
Agreemnt Type:   A                            Pmt Terms:        W
    Tax Code:                               Ticket Nbr:  10040927
  Ticket Type:  ( S )                       # BOR Items:
   Serial Nbr  Pmt Amt  Spiff  ESP Amt    Serial Nbr  Pmt Amt  Spiff  ESP Amt
   ▉




        Enter a serial number or one of the function key options listed below

 F1-List InventoryF2-Get By Model #( F3-Special Order )F4-Stock OrderF5-HelpF6-Pkg
```

**Figure 8-32 New Agreement Add Screen Special Order**

Enter the model number for the item you will be renting out or a few characters of the model number to choose from the list as shown in Figure 8-33.

```
                              New Agreement Add                         07/13/07

Customer Name: SAKS            , CHARLES            Acct#:  10012234

 ┌─────────────────────────────────────────────────────────────────────────┐
 ║▉FDASHD173         DINING ROOM                5PC BLK/GLASS EXETER TABLE║
 ║ FDASHD173/70      DINING ROOM                BLK EXETER ETAGERE        ║
 ║ FDASHD179-25      DINING ROOM                GLASS/IRON 4 CHAIR        ║
 ║ FDASHD200         DINING ROOM                STAINLESS STEEL TOP       ║
 ║ FDASHD205         DINING ROOM                5PC MAPLE/GLASS TABLE      ║
 ║ FDASHD205/25      DINING ROOM                6PC MAPLE TAPLE W/BENCH    ║
 ║ FDASHD205/30      DINING ROOM                MAPLE TILE TOP            ║
 ║ FDASHD206         DINING ROOM                5PC BLF POSH TABLE        ║
 ║ FDASHD206/H       DINING ROOM                BCK POSH HUTCH            ║
 ║ FDASHD208/15      DINING ROOM                5PC GLASS/NICKEL/CHERRY    ║
 ║ FDASHD208/25      DINING ROOM                5PC CHERRY TABLE          ║
 └─────────────────────────────────────────────────────────────────────────┘

Model Nbr:  FD                  Fabric:        Color:
    Fabric:                                Color:

 F1-Forward        F2-Back       F6-Add Item      F10-Exit        ENTER-Select
```

**Figure 8-33 New Agreement Add Screen model number input**

Using your arrow keys, highlight the model number you need, and press ENTER. If security permits, you may press the F6 key to add the model number following the instructions in Item Maintenance (ITEMMNTS). Your screen will now change to resemble Figure 8-34.

```
                          New Agreement Add                    07/13/07

Customer Name: SAKS          , CHARLES          Acct#:  10012234

Salesmen Nbrs:     1                  Agreemnt Nbr:
 Acct Mgr Nbr:   901                  Agreemnt Date:    7/13/07
    Store Nbr:    1                   Delivery Date:    7/13/07
       Source:   TV                      Cust Type:         O
Agreemnt Type:    A                      Pmt Terms:         W
     Tax Code:                           Ticket Nbr:   10040927
  Ticket Type:   S                      # BOR Items:
    Serial Nbr  Pmt Amt  Spiff  ESP Amt    Serial Nbr  Pmt Amt  Spiff  ESP Amt



                              ┌──────────────────┐
                              │                  │
                              │   Press the F9 key │
                              │                  │
                              └──────────────────┘




Model Nbr:  █DASHD205/25       Fabric:      Color:
      Fabric:                          Color:
 █1-Inv On Order              █8-Abort              █10-Exit
```

**Figure 8-34 New Agreement Add Screen model number input resulting screen**

Press the F9 key and your screen will change to resemble Figure 8-35.

```
                          New Agreement Add                    07/13/07

Customer Name: SAKS          , CHARLES          Acct#:  10012234

Salesmen Nbrs:     1                  Agreemnt Nbr:
 Acct Mgr Nbr:   901                  Agreemnt Date:    7/13/07
    Store Nbr:    1                   Delivery Date:    7/13/07
       Source:   TV                      Cust Type:         O
Agreemnt Type:    A                      Pmt Terms:         W
     Tax Code:                           Ticket Nbr:   10040927
  Ticket Type:   S                      # BOR Items:
    Serial Nbr  Pmt Amt  Spiff  ESP Amt    Serial Nbr  Pmt Amt  Spiff  ESP Amt
    █PEC ORDER








     Enter a serial number or one of the function key options listed below

 █1-List InventoryF2-Get By Model #█3-Special OrderF4-Stock OrderF5-HelpF6-Pkg
```

**Figure 8-35 New Agreement Add Screen resulting special order screen**

Press the ENTER key to enter a payment amount.   Continue with rental as noted on pages 19-27 of this section.

## *Updating the RTO Agreement when the Special Order item has arrived*

Once the inventory is received that was on Special Order for this customer and the item is ready to be delivered, the serial number is placed on the rent to own ticket using the INVTRAN program.  To attach the serial number to this ticket refer to the instructions in Transfer Type Option 4 explained in .

## *Changing and Closing Special Order Tickets*

Special Order tickets can be changed in the RTOCSMNT program. More items can be added to the ticket, but removal of Special/Stock Order items needs to be done in the RTOCLOSE program. A Special/Stock Order item can be changed as long as the item has not already been ordered through the RSSS Purchase Order System. See Figure 8-36.

```
                          Close RTO Tickets                        03/01/05
Name: SAKS          , CHARLES    Store:    1  Acct#:     511975
 Rate Of Pmt:     500.00    Rate Of Grp:      0.00    Rate Of ESP:      0.00
 Rate Of Tax:      28.00    Ttl Reg Due:    528.00    Next Pmt Due:   3/01/05
Agreemnt Amt:  5,612.00    Agreemnt Bal:  5,112.00    # BOR Items:
   Pmt Terms: Q           Agreemnt Type:   1 MONTHS   Balloon Pmt:      0.00
Model Nbr          Serial Nbr  Pmt Amt    Spiff   Agreemnt Date Agreemnt Bal
PVKAW506MAH        SPEC ORDER   500.00      █            3/01/05     1500.00




 F1-Close Ticket        F2-Close Item        F5-Help        F8-Backout
```

**Figure 6-61 Close RTO Tickets Screen Special Order ticket selected**

## *Adding a new short-term rental (Rent to Rent agreement)*

Select R for Rent to Rent in the ticket type field. Continue with rental as noted on pages 19-27. See Figure 8-37.

```
                         New Agreement Add                        07/13/07

Customer Name: SAKS          , CHARLES           Acct#:  10012234

Salesmen Nbrs:     1                     Agreemnt Nbr:
  Acct Mgr Nbr:   901                    Agreemnt  ┌─────────────────────────┐
     Store Nbr:     1                    Delivery  ║ O  Rent To Own          ║┐
        Source:   TV                         Cust ║ S  Special Order        ║║
 Agreemnt Type:    A                         Pmt T║ F  Fee Ticket           ║║
      Tax Code:                              Ticket║ R  Rent To Rent        ║║
   Ticket Type:  _____←            # BOR I║ T  RTR Special Order  ║║
    Serial Nbr  Pmt Amt  Spiff  ESP Amt    Serial ║                         ║║
```

**Figure 8-37 New Agreement Add Screen Ticket Type R for Rent to Rent**

## Adding a Fee Ticket

You can add a fee ticket by selecting the F in the ticket type field.  See Figure 8-38.

```
                         New Agreement Add                        07/13/07

Customer Name: SAKS          , CHARLES           Acct#:  10012234

Salesmen Nbrs:     1                     Agreemnt Nbr:
  Acct Mgr Nbr:   901                    Agreemnt  ┌─────────────────────┐
     Store Nbr:     1                    Delivery  ║ A  Airtime          ║┐
        Source:   TV                         Cust ║ C  Club             ║║
 Agreemnt Type:    A                         Pmt T║ O  Other            ║║
      Tax Code:                              Ticket║ P  Phone           ║║
   Ticket Type: (F) Fee Type:_____→      # BOR I║                    ║║
    Serial Nbr  Pmt Amt  Spiff  ESP Amt    Serial ║                     ║║

      Enter an (O) for a Rent-To-Own agreement; space bar to list choices
 F10-Exit                                              ENTER-Select
```

**Figure 8-38 New Agreement Add Screen Ticket Type F for Fee Ticket**

The next prompt is Fee Type.  Club for fee type can be used for your company's own in-house "club" that comes with special discounts and invitations or for a third party provider with other benefits.  Other is a free form ticket type that can be used for various other fees.  Please check with your management for uses of this field within your company if you have any questions about this field type.  See Figure 8-39.

```
                          New Agreement Add                        07/07/05

Customer Name: SAKS              , CHARLES              Acct#:    511975

Salesmen Nbrs:    1                      Agreemnt Nbr:
 Acct Mgr Nbr:    1                      Agreemnt Date:   7/07/05
    Store Nbr:   1                       Delivery Date:   7/07/05
       Source:  DC                          Cust Type:        R
Agreemnt Type:   A                          Pmt Terms:        M
     Tax Code:                             Ticket Nbr:    231963
  Ticket Type:   F Fee Type: OTHER FEE   # BOR Items:
    Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt








Any Changes: N
_____

 F8-Backout                                                   F10-Exit
```

**Figure 8-39 New Agreement Add Screen Ticket Type F Fee Type Other Fee**

You will be prompted with "Any Changes: N". To accept the default of N for no, press ENTER. If you need to make changes, enter Y for yes.

**RATE OF PMT**     Enter the recurring rate for the fee ticket.

Continue on with rest of the rental as shown in pages 19-27.

## *Taking a Free Payment on a new account*

The first thing that has to be set up before you can take a free payment on a new account is the program "DPCODES". You will have to have a promotional code set up for the type free payment you will be taking.

Follow the instructions on the previous pages for entering in the agreement. When you get to the second screen, down at the "Pmt Form" field, begin using the following instructions. See Figure 8-40.

```
                          New Agreement Add                        03/01/05

Customer Name: SAKS              , CHARLES              Acct#:      511975
 Student Name: SAKS              , SACHA
 Rate Of Pmt:      50.00     Rate Of Grp:               Rate Of ESP:     2.50
  Rate Of Tax:      2.80     Ttl Reg Due:      55.30    Next Pmt Due:
Agreemnt Amt:     875.00     Agreemnt Bal:    875.00    Balloon Pmt:
Delivery Amt:                1st Pmt Amt:      50.00     GRP/ESP Amt:     2.50
 Deposit Amt:                   Proc Fee:                  Tax Amt:      2.80
    Total Due:      55.30           Pmt 1:   /   55.30       Pmt 2:   /
   Pmt Terms: M  18 Mths   Amt Received
   Serial Nbr  Pmt Amt  Spiff  ESP Amt │CASH                           001
   0004          50.00          2.50   │CHECKS                         002
                                       │MONEY ORDERS                   003
                                       │CHARGE CARDS                   004
                                       │NON CASH REFUND                005
       ┌───────────────────┐           │CASH REFUND                    006
       │ Press enter for pop│          │PAY BAD CHECK                  007
       │    up window to    │          │(FREE PAYMENT)                 008
       │display if you do not│         │MIXED (CASH & CHECK)           009
       │know free pmt code  │
       └───────────────────┘
                   Method of paying (ENTER

  F1-Forward            F2-Back            F10-Exit          ENTER-Select
```

**Figure 8-40 New Agreement Add Screen taking a free payment**

At the "Pmt Form" enter "8-Free Payment". A window will now open from which you need to pick a promotional code, see Figure 8-41.

```
                          New Agreement Add                        03/01/05

Customer Name: SAKS              , CHARLES              Acct#:      511975
 Student Name: SAKS              , SACHA
 Rate Of Pmt:      50.00     Rate Of Grp:               Rate Of ESP:     2.50
  Rate Of Tax:      2.80     Ttl Reg Due:      55.30    Next Pmt Due:
Agreemnt Amt:     875.00     Agreemnt Bal:    875.00    Balloon Pmt:
Delivery Amt:                1st Pmt Amt:      50.00     GRP/ESP Amt:     2.50
 Deposit Amt:                   Proc Fee:                  Tax Amt:      2.80
    Total Due:      55.30           Pmt 1:  8/   55.30       Pmt 2:   /
   Pmt Terms: M  18 Mths   Amt Received:              Change Due:      0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   0004          50.00          2.50   │EXCHANGE CREDIT               1
                                       │OTHER                         2
                                       │EMP SALES                     3
       ┌───────────────────┐           │RENTAL SALE                   4
       │ Arrow down and     │          │(ADVERTISING PROMOTION        5)
       │ highlight the item │  ──────▶
       │ you want to select │
       │ and press ENTER    │
       └───────────────────┘

                   Method of paying (ENTER

  F1-Forward            F2-Back            F10-Exit          ENTER-Select
```

**Figure 8-41 New Agreement Add Screen payment prompt for free payment**

Highlight the code you want to use and press the ENTER key. Your cursor will now be at the "Amt Received" prompt. Enter the payment amount shown at the "Total Due" prompt. See Figure 8-42. In this example the free payment is $20 and the cash the customer pays is $35.30 for a total of $55.30, see Figure 8-43.

```
                         New Agreement Add                          03/01/05

Customer Name: SAKS            , CHARLES            Acct#:     511975
 Student Name: SAKS            , SACHA
 Rate Of Pmt:      50.00    Rate Of Grp:              Rate Of ESP:      2.50
 Rate Of Tax:       2.80    Ttl Reg Due:    55.30   Next Pmt Due:
Agreemnt Amt:     875.00    Agreemnt Bal:  875.00    Balloon Pmt:
Delivery Amt:              1st Pmt Amt:     50.00    GRP/ESP Amt:       2.50
 Deposit Amt:               Proc Fee:                   Tax Amt:       2.80
    Total Due:     55.30         Pmt 1:  8/   55.30         Pmt 2:    /
   Pmt Terms: M  18 Mths  Amt Received:            Change Due:        0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt  Serial Nbr  Pmt Amt  Spiff  ESP Amt
    0004         50.00          2.50



                            ┌─────────────────┐
                            │ Enter the correct│
                            │pmt amts that match│
                            │   the total due  │
                            └─────────────────┘




          The first amount the customer is paying today (if any)

 F3-Calc Amt/Date      F4-Calc Date/Amt      F5-Help      F8-Backout      F10-Exit
```

**Figure 8-42 New Agreement Add Screen total due prompt for free payment**

```
                        New Agreement Add                   03/01/05

Customer Name: SAKS            , CHARLES          Acct#:    511975
 Student Name: SAKS            , SACHA
 Rate Of Pmt:       50.00   Rate Of Grp:             Rate Of ESP:      2.50
 Rate Of Tax:        2.80   Ttl Reg Due:     55.30   Next Pmt Due:
Agreemnt Amt:      875.00   Agreemnt Bal:   875.00   Balloon Pmt:
Delivery Amt:               1st Pmt Amt:     50.00   GRP/ESP Amt:      2.50
 Deposit Amt:               Proc Fee:                   Tax Amt:      2.80
   Total Due:      55.30         Pmt 1:  8/  20.00        Pmt 2:  1/  35.30
   Pmt Terms: M  18 Mths  Amt Received:     55.30   Change Due:       0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   0004          50.00           2.50



                 The total amount entered in pmt 1 and 2


  F3-Calc Amt/Date     F4-Calc Date/Amt     F5-Help     F8-Backout     F10-Exit
```

***Figure 8-43 New Agreement Add Screen total amount equals pmt amounts***

Once you have filled in all the information, press the F9 key. You may be prompted to enter an alternate price. If this is a monthly agreement, you will be prompted to enter a weekly payment amount or vice versa. Enter the information requested and press the ENTER key.

You will now see a prompt "Cash Selling Price". Verify that this is correct and press the ENTER key.

You will be prompted with "Any Changes: N". If you don't have any changes, press the ENTER key. See Figure 8-44.

```
                         New Agreement Add                        03/01/05

Customer Name: SAKS              , CHARLES          Acct#:    511975
 Student Name: SAKS              , SACHA
 Rate Of Pmt:      50.00     Rate Of Grp:              Rate Of ESP:      2.50
 Rate Of Tax:       2.80     Ttl Reg Due:      55.30   Next Pmt Due:
Agreemnt Amt:     875.00     Agreemnt Bal:    875.00   Balloon Pmt:
Delivery Amt:                1st Pmt Amt:       50.00  GRP/ESP Amt:      2.50
 Deposit Amt:                Proc Fee:                 Tax Amt:          2.80
   Total Due:      55.30            Pmt 1:  8/   20.00     Pmt 2:  1/   35.30
   Pmt Terms: M  18 Mths  Amt Received:      55.30   Change Due:       0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   0004         50.00           2.50




Any Changes: N

 ─────────────────────────────────────────────────────────────────────────
  F3-Calc Amt/Date     F4-Calc Date/Amt     F5-Help     F8-Backout    F10-Exit
```

**Figure 8-44 New Agreement Second Screen**

A prompt on the bottom will be displayed asking if you want to "Transfer Inv Loc: Y". The answer should be yes. Cash Selling Price is still displayed. See Figure 8-45.

```
                         New Agreement Add                        03/01/05

Customer Name: SAKS              , CHARLES          Acct#:    511975
 Student Name: SAKS              , SACHA
 Rate Of Pmt:      50.00     Rate Of Grp:              Rate Of ESP:      2.50
 Rate Of Tax:       2.80     Ttl Reg Due:      55.30   Next Pmt Due:
Agreemnt Amt:     875.00     Agreemnt Bal:    875.00   Balloon Pmt:
Delivery Amt:                1st Pmt Amt:       50.00  GRP/ESP Amt:      2.50
 Deposit Amt:                Proc Fee:                 Tax Amt:          2.80
   Total Due:      55.30            Pmt 1:  8/   20.00     Pmt 2:  1/   35.30
   Pmt Terms: M  18 Mths  Amt Received:      55.30   Change Due:       0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   0004         50.00           2.50




Transfer Inv Loc: Y                    Cash Selling Price:    875.00

 ─────────────────────────────────────────────────────────────────────────
  F3-Calc Amt/Date     F4-Calc Date/Amt     F5-Help     F8-Backout    F10-Exit
```

**Figure 8-45 New Agreement Add Screen Transfer Inv Loc prompt**

It will then prompt you with "New Inventory Location". Enter the location code for the customer's home and press the ENTER key. See Figure 8-46.

```
                        New Agreement Add                     03/01/05

Customer Name: SAKS           , CHARLES          Acct#:     511975
 Student Name: SAKS           , SACHA
 Rate Of Pmt:      50.00    Rate Of Grp:              Rate Of ESP:       2.50
 Rate Of Tax:       2.80    Ttl Reg Due:     55.30   Next Pmt Due:
Agreemnt Amt:     875.00    Agreemnt Bal:   875.00   Balloon Pmt:
Delivery Amt:              1st Pmt Amt:     50.00    GRP/ESP Amt:       2.50
 Deposit Amt:                  Proc Fee:               Tax Amt:        2.80
   Total Due:      55.30          Pmt 1:  8/   20.00       Pmt 2:  1/   35.30
   Pmt Terms: M  18 Mths  Amt Received:     55.30    Change Due:       0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   0004          50.00            2.50




Transfer Inv Loc: Y
New Inventory Location: ▌901
                        Enter Zero To Cancel
_____

 F3-Calc Amt/Date      F4-Calc Date/Amt      F5-Help      F8-Backout      F10-Exit
```

***Figure 8-46 New Agreement Add Screen New Inventory Location prompt***

You will now be prompted for "Del Notes". There are three delivery note areas that you will enter through. These fields are used to write delivery notes or other information you want to customize for delivery ticket. These notes will be printed on the "Delivery Ticket" which will print right after the receipt. You are prompted to enter delivery notes for up to three lines automatically. Recommendations for this field: Type regular payment amount and next due date in the first two delivery note fields as another reminder to your customer on delivery. In the example, I entered SEE U NEXT MONTH! in Delivery Note Field #3. See Figure 8-47.

The printed Delivery Ticket will have a place for the Delivery person's signature and the customer's signature.

```
                        New Agreement Add                        03/01/05

Customer Name: SAKS            , CHARLES          Acct#:     511975
 Student Name: SAKS            , SACHA
 Rate Of Pmt:      50.00    Rate Of Grp:             Rate Of ESP:     2.50
 Rate Of Tax:       2.80    Ttl Reg Due:     55.30  Next Pmt Due:  4/01/05
Agreemnt Amt:     875.00    Agreemnt Bal:    875.00  Balloon Pmt:
Delivery Amt:              1st Pmt Amt:     50.00   GRP/ESP Amt:     2.50
 Deposit Amt:                  Proc Fee:             Tax Amt:     2.80
   Total Due:      55.30          Pmt 1:  8/   20.00      Pmt 2:  1/   35.30
   Pmt Terms: M  18 Mths  Amt Received:     55.30   Change Due:      0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   0004          50.00          2.50




Transfer Inv Loc: Y
Del Notes: 50.00                 04/01/05           SEE U NEXT MONTH!█
                          Delivery Notes Line 3

 F3-Calc Amt/Date     F4-Calc Date/Amt     F5-Help    F8-Backout    F10-Exit
```

***Figure 8-47 New Agreement Add Screen Del Notes prompt***

Press the ENTER key after delivery note field(s) and you will then be prompted with "Any Changes". See Figure 8-48. An "N" to this question will print a receipt and delivery ticket.

```
                          New Agreement Add                         03/01/05

Customer Name: SAKS            , CHARLES              Acct#:      511975
 Student Name: SAKS            , SACHA
 Rate Of Pmt:      50.00    Rate Of Grp:              Rate Of ESP:      2.50
 Rate Of Tax:       2.80    Ttl Reg Due:      55.30   Next Pmt Due:   4/01/05
Agreemnt Amt:     875.00    Agreemnt Bal:    875.00   Balloon Pmt:
Delivery Amt:               1st Pmt Amt:      50.00   GRP/ESP Amt:      2.50
 Deposit Amt:                  Proc Fee:                 Tax Amt:      2.80
   Total Due:      55.30          Pmt 1:  8/   20.00        Pmt 2:  1/   35.30
   Pmt Terms: M  18 Mths  Amt Received:      55.30      Change Due:      0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt   Serial Nbr  Pmt Amt  Spiff  ESP Amt
   0004          50.00          2.50




       Any Changes: N




 F3-Calc Amt/Date     F4-Calc Date/Amt      F5-Help     F8-Backout     F10-Exit
```

***Figure 8-48 New Agreement Add Screen Any changes prompt before printing***

You will then be prompted with "Print Agreement".   Enter "Y" to print agreement or an "N" if you do not want to print agreement and press the ENTER key, see Figure 8-49.

```
                          New Agreement Add                      03/01/05

Customer Name: SAKS           , CHARLES           Acct#:     511975
 Student Name: SAKS           , SACHA
 Rate Of Pmt:      50.00    Rate Of Grp:             Rate Of ESP:      2.50
 Rate Of Tax:       2.80    Ttl Reg Due:     55.30  Next Pmt Due:   4/01/05
Agreemnt Amt:     875.00    Agreemnt Bal:   875.00  Balloon Pmt:
Delivery Amt:               1st Pmt Amt:     50.00  GRP/ESP Amt:      2.50
 Deposit Amt:               Proc Fee:                   Tax Amt:      2.80
   Total Due:     55.30          Pmt 1:  8/   20.00      Pmt 2:  1/   35.30
   Pmt Terms: M  18 Mths  Amt Received:     55.30  Change Due:      0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt  Serial Nbr  Pmt Amt  Spiff  ESP Amt
   0004          50.00           2.50




   Print Agreement: Y



 _____
 F3-Calc Amt/Date     F4-Calc Date/Amt     F5-Help     F8-Backout     F10-Exit
```

**Figure 8-49 New Agreement Add Screen Print Agreement prompt**

You will then be prompted "Would you like to post a sale?", see Figure 8-50.

```
                          New Agreement Add                      03/01/05

Customer Name: SAKS           , CHARLES           Acct#:     511975
 Student Name: SAKS           , SACHA
 Rate Of Pmt:      50.00    Rate Of Grp:             Rate Of ESP:      2.50
 Rate Of Tax:       2.80    Ttl Reg Due:     55.30  Next Pmt Due:   4/01/05
Agreemnt Amt:     875.00    Agreemnt Bal:   875.00  Balloon Pmt:
Delivery Amt:               1st Pmt Amt:     50.00  GRP/ESP Amt:      2.50
 Deposit Amt:               Proc Fee:                   Tax Amt:      2.80
   Total Due:     55.30          Pmt 1:  8/   20.00      Pmt 2:  1/   35.30
   Pmt Terms: M  18 Mths  Amt Received:     55.30  Change Due:      0.00
   Serial Nbr  Pmt Amt  Spiff  ESP Amt  Serial Nbr  Pmt Amt  Spiff  ESP Amt
   0004          50.00           2.50




                 Would you like to post a sale? N



 F3-Calc Amt/Date     F4-Calc Date/Amt     F5-Help     F8-Backout     F10-Exit
```

**Figure 8-50 New Agreement Add Screen Would you like to post a sale prompt**

If you enter a "Y" for yes, you will be taken to a Sales Entry Screen to post a sale or sales items, see Figure 8-51.

```
Store:      1                    Sales Entry  D                          3/01/05
 Name: SAKS            , CHARLES            Acct#:     511975   H Ph: (123)456-7890
  Add: 123 ABC LANE                                            W Ph: (987)654-3210
 City: SAN ABC         TX 12345   License: 32323232               SSAN 234-56-7990
Comment:




















Right Cust:  Y
                              Enter an "N" or a "Y"

  F1-Cust Chgs    F3-Prev Tickets    F5-Help   F6-Comment   F8-Backout   F9-Done
```

***Figure 8-51 New Agreement Add Screen F9 Post a Sale Screen prompt "Y"***

If you enter "N" for no, you will be returned to the Customer Maintenance screen. See Figure 8-52.

```
                         Customer Maintenance                        03/01/05
Customer Name/#: █_____
















 F1-Address  F2-Drvrs Lic  F3-SSAN  F4-Acct Nbr  F5-Help  F6-Find by Phone#
```

***Figure 8-52 New Agreement Add Screen F9 Post a Sale Screen prompt "N"***

Enter the next new agreement or press the F8 key to back out and return to the menu.