



2015 WinNetStar Training Classes

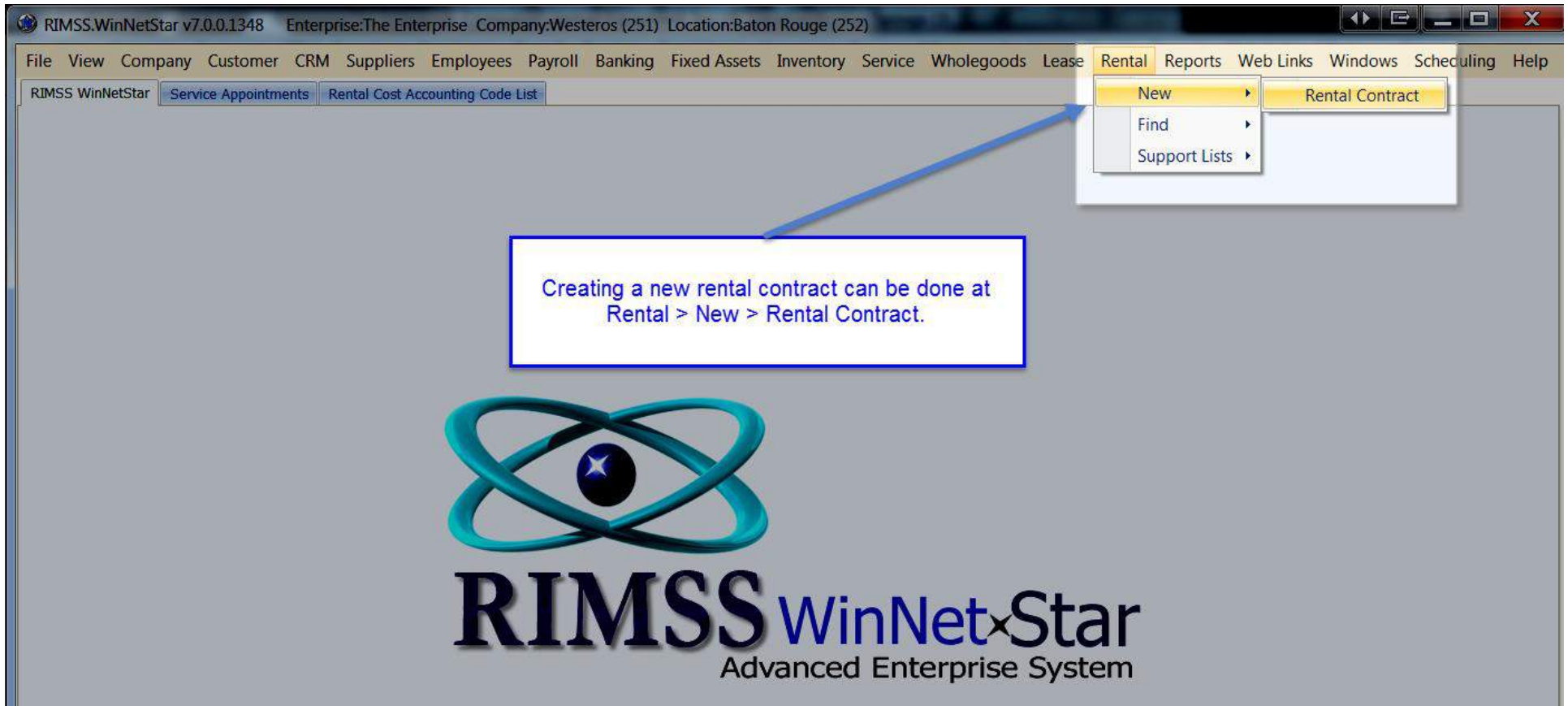
How to create a Rental Contract and a Rental Invoice

Software Development-W1
RIMSS Business Systems Technology

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Rental contracts are created to form the agreement to rent equipment and vehicles. Rental invoices are created from within the rental contract according to the terms of the contract created. Only items included in the rental contract may be included on the rental invoice.



When you open a new Rental Contract, you will be brought to the "New Rental Contract" screen. Here you must input the Customer Information, Operator Information, Rental Period, and the "Out", "In" and "Due" dates for the contract. You may also change the contract date or input additional information such as PO #, DOT #, Memos, Insurance, and any required Location/Commodity information.

RIMSS.WinNetStar v7.0.0.1348 Enterprise:The Enterprise Company:Westeros (251) Location:Baton Rouge (252)

File View Company Customer CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar Service Appointments Rental Cost Accounting Code List **New Rental Contract**

Save Save and Close Save and New Save and Print Save and Create Invoice Signature Capture Void

Contract # 0 Contract Status Open Salesman MICHELLE LEMOINE Sub For

Contract Date 25/08/2014 Customer PO# 12345 Customer DOT# xxxxxxxxxxxx User Ref.

Last Inv. Date Memo Billing Freq.

General Equipment Attachments Invoice History Customer Master

Customer Name and Address		Operator Information				Insurance	
Name	LEE CHESNUT	Name	Buddy Chesnut	DL #	788388821	Type	Commercial
Address 1	2909 LAUREL OAK DRIVE NEW	Address 1	Route 3 Box 26	DL State	TX	Carrier	Farmers
Address 2	SUITE 100-A	Address 2		DL Exp.	14/02/2016	Policy #	xxxxxxxxxx
City	MCKINNEY	City	Mesquite	DL Type	Non CDL	Contact Name	John Smith
State	TX	State	TX	Birth Date	14/02/2008	Contact Phone	123-456-7890
Zip Code	75071	Zip Code	75822	Other		Exp Date	31/12/2014
Primary Contact	Chesnut, Buddy (800) 766-4642	Phone	555-1212			Contact Name	
						Contact Phone	
						Exp Date	01/01/0001

Rental Period

Rental Period	Qty
WEEK	1.00

Date	Time
Out 25/08/2014	12:49:47 PM
Due 01/09/2014	12:49:47 PM
In 01/09/2014	12:00:00 AM
Due Override	

Location of Use Texas

Commodity Hazardous Waste

Equip. Rental	Other	Total
\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00

Tax Group BATON ROUGE, EBR PARISH, LOUIS... Tax Rate 10.00 % Subtotal

Hide Customer Information (F9)

Payment Terms: COD Credit Limit: \$0.00 Days Past Due: 53 Price Level: List

Due Date: 25/08/2014 Available Credit: -\$5,017.76 Balance: \$5,017.76

The New Rental Contract page > General Tab is where you can input the Customer, Operator and basic details of the contract.

Contract # 100003 Contract Status Open Salesman MICHELLE LEMOINE Sub For

Contract Date 25/08/2014 Customer PO# 12345 Customer

Last Inv. Date 25/08/2014 Memo

General Equipment Attachments Invoice History Customer Master

Add Rental Unit Add Misc Charge Recalculate

While on the "Rental Contract" (or "New Rental Contract") page, click on the "Equipment" tab to be able to add rental units and accessories to your contract. Clicking on "Add Rental Unit" will bring up the "Find Wholegood" pop-up box where you can search for and select the rental units.

Drag a column

Find Wholegood

System ID	Stock #	Description	Category	Group	Class	Owner
		TRACTOR	All	All	All	
Serial #	Sales Status	Make	Model	Rental Status	New/Used	Company/Location
	All	All	All	AFR, Contract...	All	Westeros:Baton Rouge

Fetch

Drag a column header here to group by that column

Inactive	System	Type	Sales	Serial #	Description	Owner	Sold Date	Asking	COGS	Cost
False	150	Sales	AFS	987987	TRACTOR 987	Westeros...		\$15,000.00	\$0.00	\$7,500.00

[Inactive] = 'False' Edit Filter

Total	Status
\$206.80	Out
-\$31,304.86	Out
\$0.00	Out

Contract # 100003 **Contract Status** Open **Salesman** MICHELLE LEMOINE **Sub For**
Contract Date 25/08/2014 **Customer PO#** 12345 **Customer DOT#** xxxxxxxxxxxx **User Ref.**
Last Inv. Date 25/08/2014 **Memo**

General **Equipment** Attachments Invoice History Customer Master

While on the "Equipment" tab, you can also click the "Add Misc Charge" button to add any Miscellaneous Charges to the contract.

Drag a column header here to group by that column

Type	Adjust For	Misc. Rental Charge	Total	Status
WG	<input checked="" type="checkbox"/>		\$206.80	Out
Misc	<input checked="" type="checkbox"/>		\$0.00	Out

Misc. Rental Charge

Add New Refresh Print Restore Layout

Drag a column header here to group by that column

Inactive	Description	Account To Credit	Category	Tax Status	Prod Code	Code De...	Fixed Amount	Variable Amount
False	PICK UP/DELIVERY	BTR-4-43000-02 (FREIGH...	TRACTORS	Taxable			\$0.00	\$0.00
False	HOOR OVERAGE	BTR-4-10000-01 (REVENUE)		Taxable			\$0.00	\$10.00
False	INSURANCE GUARANTY	BTR-4-10000-01 (REVENUE)		Taxable			\$150.00	\$0.00
False	FUEL	BTR-4-10000-01 (REVENUE)		Taxable			\$0.00	\$6.25
False	MAINTENANCE FEE	BTR-4-10000-01 (REVENUE)		Taxable			\$0.00	\$0.00
False	EQUIPMENT CLEANING	BTR-4-10000-01 (REVENUE)		Taxable			\$150.00	\$0.00

[Inactive] = 'False' Edit Filter

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RIMSS WinNetStar Service Appointments Rental Cost Accounting Code List New Rental Invoice Rental Contract List Rental Contract - 100003 Misc. Rental Charge

Save Save and Close Save and New Save and Print Save and Create Invoice Signature Capture Void

Contract # 100003 Contract Status Open Salesman MICHELLE LEMOINE Sub For
 Contract Date 25/08/2014 Customer PO# 12345 Customer DOT# xxxxxxxxxxxx User Ref.
 Last Inv. Date Memo Billing Freq.

General Equipment Attachments Invoice History Customer Master

Add Rental Unit Add Misc Charge Recalculate

You have the option to upload attachments to attach permanently to the contract (scans of equipment licenses, insurance documents, photographs, etc) on the "Attachments" tab.

Drag a column header here to group by that column

Type	Adjust For	Misc	ID	Description	Qty	Base Chg.	Extended	Clock Hr.	Mach. Hr.	Mileage	Other	Discount	Subtotal	Tax Group	Total	Status
WG			(150)	TRACTOR 987	1.00	\$550.00	\$550.00	0.00	0.00	0.00	0.00	0.00 %	\$550.00	BATON R...	\$605.00	Out
Misc		Fixed	PICK UP/DELIVERY		0.00	\$0.00	\$0.00	0.00	0.00	0.00	0.00	0.00 %	\$0.00	BATON R...	\$0.00	Out

Amounts for the Miscellaneous charges will be input on the invoice after it is created.

Once all charges are added to the contract, click "Save". If you are ready to invoice, click "Save and Create Invoice"

Void Print

Contract # 100003 **Inv #** 0 **Salesman** MICHELLE LEMOINE **Invoice Date** 25/08/2014
Status **PO #** 12345 **Memo**

General Attachments Print History Customer Master

Customer Name and Address

Name LEE CHESNUT
 Address 1 2909 LAUREL OAK DRIVE-NEW
 Address 2 SUITE 100-A
 City MCKINNEY
 State TX Zip Code 75071
 Primary Contact Chesnut, Buddy (800) 766-4642

The invoice will pop-up after clicking "Save and Create Invoice".

F8-Settle Invoice F10-Apply Discount

Show Customer Information (F9)

Drag a column header here to group by that column.

Type	ID	Description	Qty	Base Charge	Prev. Billed ...	Extended Ba...	Clock Hour ...	Mach. Hr. Fee	Mileage Fee	Other Fee	Discount	Subtotal	Taxgroup Id	Total
WG	(150)	TRACTOR 987	1.00	\$550.00	\$0.00	\$550.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00 %	\$550.00	BATON ROU...	\$605.00
Misc	PICK UP/DEL...		1.00	\$75.00	\$0.00	\$75.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00 %	\$75.00	BATON ROU...	\$75.00

Corrections, hours, mileage, and amounts may be input directly on the invoice.

	Taxable	Non-Tax.	Total	Tax Group
SubTotal	\$550.00	\$0.00	\$550.00	BATON ROUGE, EBR P...
Tax	\$55.00		\$55.00	Rate
Total	\$605.00	\$605.00	\$605.00	10.000 % SubTotal

Click SubTotal to verify final amount. Then hit F8 or click "F8-Settle Invoice" to settle to account

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RIMSS WinNetStar Service Appointments Rental Cost Accounting Code

Void Print

Contract # 100003 Inv # 0 Status PO # 12345

General Attachments Print History Customer Master

Customer Name and Address

Name LEE CHESNUT
 Address 1 2909 LAUREL OAK DRIVE-NEW
 Address 2 SUITE 100-A
 City MCKINNEY
 State TX Zip Code 75071
 Primary Contact Chesnut, Buddy (800) 766-4642

Show Customer Information (F9)

Drag a column header here to group by that column

Type	ID	Description	Qty	Base Cha
WG	(150)	TRACTOR 987	1.00	\$7
Misc	PICK UP/DEL...		1.00	

SubTotal Taxable Non-Tax. Total Tax Group

SubTotal	\$819.60	\$0.00	\$819.60	BATON ROUGE,
Tax	\$81.96		\$81.96	Rate
Total	\$901.56	\$901.56	\$901.56	10.000 %

Settlement

	Taxable	Non-Tax.	Total
SubTotal	\$819.60	\$0.00	\$819.60
Tax	\$81.96		\$81.96
Total	\$901.56	\$901.56	\$901.56

Cash \$0.00
 Check \$0.00
 Credit Card \$0.00
Customer Account \$901.56
 Contract in Transit \$0.00
 Customer Deposit \$0.00
 Other \$0.00

Check #
 CC Type
 Reference
 Reference

Total \$901.56
 Change Due \$0.00

F8 - Save and Print Receipt
 F9 - Cancel
 F10 - Capture Electronic Signature

Input payment or settle to account. Invoice may be printed or emailed after settling.

Other Fee	Discount	Subtotal	Taxgroup Id	Total
\$10.00	15.00 %	\$739.50	BATON RO...	\$813.45
\$1.00	10.00 %	\$80.10	BATON RO...	\$88.11

Client Desktop User: michelle (RIMSS\Michelle) Role: Administrator Workstation: MICHELLE-LAPTOP Server: V3Demo Database: WinNetStarApp

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RIMSS WinNetStar Service Appointments Rental Cost Accounting Code List Misc. Rental Charge Rental Contract List New Rental Invoice Rental Contract - 100003

Save Save and Close Save and New Save and Print Save and Create Invoice Signature Capture Void

Contract # 100003 Contract Status Open Salesman MICHELLE LEMOINE Sub For

Contract Date 25/08/2014 Customer PO# 12345 Customer DOT# xxxxxxxxxxxx User Ref.

Last Inv. Date 25/08/2014 Memo Billing Freq.

General Equipment Attachments Invoice History Customer Master

Drag a column header here to group by that column

Location	Is Void	Status	Contract	Contract	Invoice	Invoice	Customer	Total	Rental	Last	Last
> Baton Ro...	<input type="checkbox"/>	Open	25/08/2014	100003	25/08/2014	1000002	LEE CHE...	901.56	WEEK	michelle	25/08/2014

You can mark a billing frequency if you want to be able to sort and pull at regular intervals.

You can send multiple invoices from 1 rental contract. Your last invoice date is noted on the top left of the Rental Contract. Your invoice history can be found on the "Invoice History" tab.