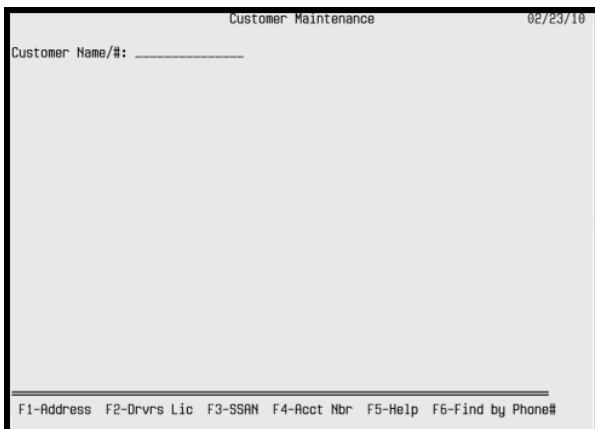


Chapter 7 - Adding a New Rental Agreement – NEW

To add a new Rental Customer agreement from the Store's Home Menu, select "Add a New Rental Agreement" from the Daily Customer Service 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 [Introduction to Reports](#) for additional information about the printer/file pathname screen. See Figure 7-1.



Customer Maintenance 02/23/10

Customer Name/#: _____

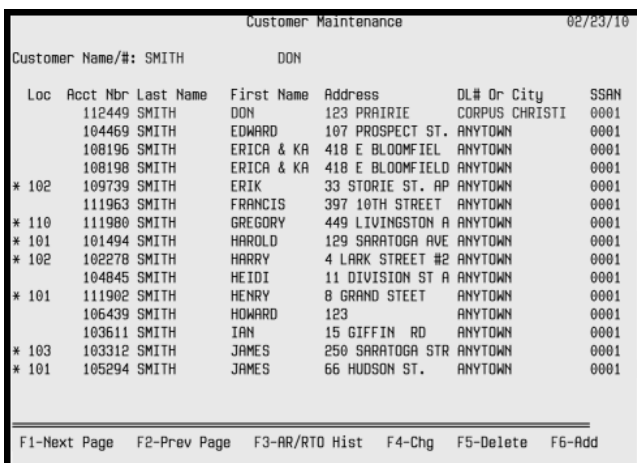
F1-Address F2-Drvr's Lic F3-SSAN F4-Acct Nbr F5-Help F6-Find by Phone#

Figure 7- 1 Customer Maintenance Screen

Find a customer in the database

To look up or find a customer, enter their last name, press enter, enter their first name, press enter, then enter through the store field (make sure the store field is a zero).

Choose your customer. If the customer needs to be added or you need more information on how to lookup a customer please refer to [Lookup/Change/Add Customer Data](#). See Figure 7-2. The "*" (asterisk) next to a customer's name means there is an active agreement for that customer.



Customer Maintenance 02/23/10

Customer Name/#: SMITH DON

Loc	Acct Nbr	Last Name	First Name	Address	DL# Or City	SSAN
	112449	SMITH	DON	123 PRAIRIE	CORPUS CHRISTI	0001
	104469	SMITH	EDWARD	107 PROSPECT ST.	ANYTOWN	0001
	108196	SMITH	ERICA & KA	418 E BLOOMFIELD	ANYTOWN	0001
	108198	SMITH	ERICA & KA	418 E BLOOMFIELD	ANYTOWN	0001
* 102	109739	SMITH	ERIK	33 STORIE ST. AP	ANYTOWN	0001
	111963	SMITH	FRANCIS	397 10TH STREET	ANYTOWN	0001
* 110	111980	SMITH	GREGORY	449 LIVINGSTON A	ANYTOWN	0001
* 101	101494	SMITH	HAROLD	129 SARATOGA AVE	ANYTOWN	0001
* 102	102278	SMITH	HARRY	4 LARK STREET #2	ANYTOWN	0001
	104845	SMITH	HEIDI	11 DIVISION ST A	ANYTOWN	0001
* 101	111902	SMITH	HENRY	8 GRAND STEET	ANYTOWN	0001
	106439	SMITH	HOWARD	123	ANYTOWN	0001
	103611	SMITH	IAN	15 GIFFIN RD	ANYTOWN	0001
* 103	103312	SMITH	JAMES	250 SARATOGA STR	ANYTOWN	0001
* 101	105294	SMITH	JAMES	66 HUDSON ST.	ANYTOWN	0001

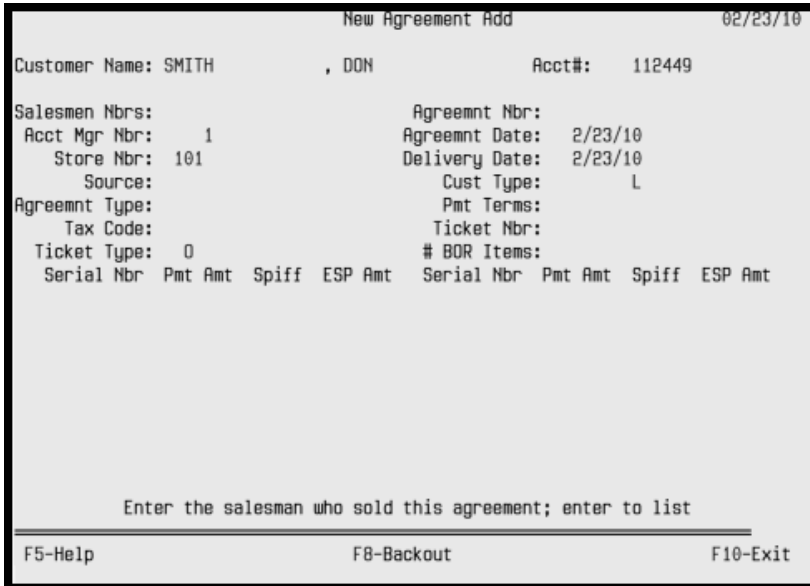
F1-Next Page F2-Prev Page F3-AR/RTO Hist F4-Chg F5-Delete F6-Add

Figure 7- 2 Customer Maintenance Screen with name lookup data

If the customer is not already in the computer, press the F6 key and you will be taken to the Customer Add screen. Please refer to [Lookup/Change/Add Customer Data](#) for how to add a customer.

Adding a new rental agreement

Once you add the customer or select the customer record that you want to add the agreement to, you will see a screen similar to Figure 7-3.



```

New Agreement Add                                02/23/10
Customer Name: SMITH                               , DON           Acct#: 112449
Salesmen Nbrs:                                     Agreemnt Nbr:
Acct Mgr Nbr: 1                                   Agreemnt Date: 2/23/10
Store Nbr: 101                                    Delivery Date: 2/23/10
Source:                                           Cust Type: L
Agreemnt Type:                                    Pmt Terms:
Tax Code:                                         Ticket Nbr:
Ticket Type: 0                                    # 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 7- 3 New Agreement Add Screen

SALESMEN 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 or enter through to leave blank.

AGREEMNT NBR Press enter and an agreement number will be automatically assigned and appears when the agreement is printed. (If you are using preprinted agreement forms, you may have the security authorization to enter the agreement number that matches the pre-printed form here).

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 END key (to blank out the existing default account manager number in this field) for a listing of available account managers, or if you know the number, type it in here and the press the END key.



Adding a Rental Agreement - NEW

AGREEMNT DATE Defaults to the current system date. Press enter to accept the default.

STORE NBR This will default to your store number. Press enter.

DELIVERY DATE Defaults to the current system date. Press enter to accept the default or enter the date the agreement is to be delivered. Use MMDDYY format and press enter. The field will format the date for you. If the date entered is more than 7 days past the agreement date, a message will appear at the bottom of the screen. You will need to respond Y or N to continue. If N, the prompt will return to the Delivery Date field to allow you to re-enter the correct date.

SOURCE Enter the advertising source associated with this rental contract. You can enter up to three advertising source codes. If you are not familiar with the advertising source codes, press enter for a listing of available codes on the first entry field. 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. If you do not need to enter the 2nd and 3rd codes, press enter through these fields.

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.

AGREEMNT TYPE Enter the type of agreement or press the enter key or space bar for a listing of agreement types. Highlight the correct agreement type for this rental and press enter. Note: The default payment term for monthly agreement is M. The default payment term for weekly agreement types is W. These are noted in the payment terms listing.

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 which will appear blank (this is the defaulted tax code for your store). Note: If you have a unique sales tax situation, consult with an application support specialist at RSSS. If the tax code is defined in the system, enter the tax code if this agreement will be taxed differently.

TICKET NBR Press enter and the next available ticket number will be automatically assigned.

TICKET TYPE The system default is **O** for rent to own of a serialized item, press the enter key and accept the default to allow you to 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.

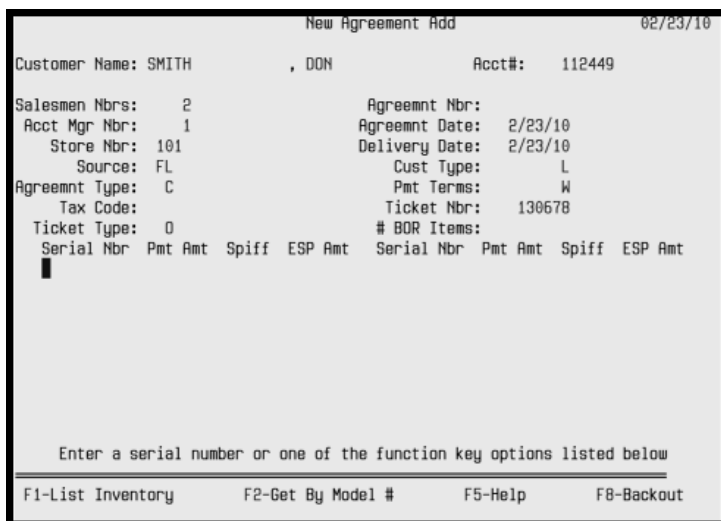
F - will allow you to choose a fee ticket. Press enter to choose club fee for a club program fee ticket or select type of other fee.

R - for rent to rent (short term rental).

T - for special order rent to rent (short term rental).

BOR ITEMS In most cases this field is no longer used. If you do not use this field just press enter through it. If you count BOR, enter the number of balance on rent items on this agreement. If it is already entered here, just press enter to accept the default.

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. If you need to make changes, press Y and the prompt will return to the top of the screen to allow you to make changes. See Figure 7-4.



New Agreement Add 02/23/10

Customer Name: SMITH , DON Acct#: 112449

Salesmen Nbrs: 2 Agreement Nbr:
Acct Mgr Nbr: 1 Agreement Date: 2/23/10
Store Nbr: 101 Delivery Date: 2/23/10
Source: FL Cust Type: L
Agreement Type: C Pmt Terms: W
Tax Code: Ticket Nbr: 130678
Ticket Type: 0 # 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 Inventory F2-Get By Model # F5-Help F8-Backout

Figure 7- 4 New Agreement Add Screen Serial Number Prompt

For items in stock

If the serial number(s) is known, enter the number. If the serial number(s) is not known, please refer to Inquiring about Inventory - INVMNT, INVMNTF & INVAVAIL.

Once the serial number is in the serial number field, press enter. Press enter to accept the defaulted payment amount. If no amount is visible or the amount is incorrect, enter the correct amount in the "Pmt Amt" field (if you have security authorization to enter or change the payment amount). The amount should be the rental rate before fees and taxes. Default pricing is set up by your company.

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 display. Press enter through it if there are no changes to the selling price (security authorization is required to change the selling price).

The cursor moves to the next serial number field.

Continue until you have all items entered. Enter the serial numbers from left to right. You may enter up to 14 items on a rental agreement. Check with your company management for how many items your company allows on one 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 changes and proceed to the next screen. See Figure 7-5.

New Agreement Add				02/23/10			
Customer Name: SMITH		, DON		Acct#: 112449			
Salesmen Nbrs:	2	Agreement Nbr:					
Acct Mgr Nbr:	1	Agreement Date:	2/23/10				
Store Nbr:	101	Delivery Date:	2/23/10				
Source:	FL	Cust Type:	L				
Agreement Type:	C	Pmt Terms:	W				
Tax Code:		Ticket Nbr:	130678				
Ticket Type:	0	# BOR Items:					
Serial Nbr	Pmt Amt	Spiff	ESP Amt	Serial Nbr	Pmt Amt	Spiff	ESP Amt
100028	46.46			106279	8.88		
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 7- 5 New Agreement Add Screen adding serial numbers/payment amount

If your company uses club tickets, you will be prompted to add a club ticket; otherwise, you will proceed to the "money" screen when you press the F9 key. If you are prompted to add a club ticket, press enter at the Y, then press enter at the defaulted regular club amount, and change the "Any Changes" prompt to N to proceed. If you are NOT adding a club ticket at "Add Club Ticket Ok" change the Y to N, press the END key to blank out the regular club payment amount and at "Any Changes" change it to N to proceed.

The following information will establish how this customer will pay from now on.

New Agreement Add		02/23/10	
Customer Name:	SMITH, DON	Acct#:	112449
Rate Of Pmt:	55.34	Rate Of Grp:	5.53
Rate Of Tax:	4.26	Ttl Reg Due:	65.13
Agreement Amt:	2,877.68	Agreement Bal:	2,877.68
Delivery Amt:		1st Pmt Amt:	55.34
Deposit Amt:		Proc/Recycle:	/
Total Due:	65.13	Pmt 1:	1/ 65.13
Pmt Terms:	W 52 Wks	Amt Received:	65.13
Serial Nbr:	100028	Serial Nbr:	106279
Pmt Amt:	46.46	Pmt Amt:	8.88
Rate Of ESP:	0.00	Next Pmt Due:	3/02/10
Balloon Pmt:		GRP/ESP Amt:	5.53
Tax Amt:	4.26	Pmt 2:	/
Change Due:	0.00		
Spiff:		Spiff:	
ESP Amt:		ESP Amt:	

Any Changes:

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

Figure 7- 6 New Agreement Add Screen with complete data entered

RATE OF PMT The total is automatically calculated based on the rate(s) 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 if you have the security authorization to do so). If changed, a prompt will appear asking if you want to recalculate cash prices, respond Y or N.

RATE OF GRP 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 Extended Service Policy. Automatically calculated from the amounts you entered when you added the customer's inventory records. Press enter.

RATE OF TAX Automatically calculated. This is the sales tax rate set up by your company. Press enter.

TTL REG DUE Automatically calculated. 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 generated amount expected as the regular payment.

NEXT PAYMENT DUE Enter the date the customer's next payment is due. Press enter. (You may press F1 to access the calendar and using your arrow keys, select the next due date).

AGREEMENT AMT This reflects the automatically calculated agreement amount (Payment amount x Payment Terms).

AGREEMENT BAL Automatically calculated. This is the agreement balance (same as agreement amount on a new agreement).



Adding a Rental Agreement - NEW

BALLOON PMT (Optional field) Enter the Balloon Pmt due at the end of the agreement if the company requires it. Press enter.

This information is to post the amount of money you have collected TODAY.

DELIVERY AMT If there is a charge for delivery, enter it here and press enter. If this is a defaulted amount, press enter.

1ST PMT AMT Enter the amount the customer paid you today (Rent Only) for their first payment. (This amount is to include the amount of free payment given, if any). This figure will reduce the agreement balance when the transaction is completed. Press enter. Note: If payment amount is less than the rate of payment, a popup window will appear requesting you to select a reason code for the whole payment not being collected. Use the arrow keys to highlight your choice and press enter. If payment amount is more than required, a message will appear at the bottom of the screen. Enter "C" to calculate the change to be given to the customer or "R" to place the difference as a credit to receivable.

GRP/ESP AMT Enter the amount of GRP to be charged as part of this first payment and collected TODAY, press enter. Enter the amount of ESP to be charged as part of this first payment and collected TODAY, press enter.

DEPOSIT AMT If you charge a security deposit, enter the amount collected today. Press enter.

PROC/RECYCLE FEE Enter the processing fee collected TODAY. This field may be used for such things as processing fees or any other miscellaneous charges. Press enter. Enter the recycle fee collected TODAY (if your company uses the recycle fee programming) then press enter.

TAX AMT Automatically calculated from the control settings set by your company. Press enter.

TOTAL DUE This total is automatically calculated based on the amounts entered in all of the fields starting with Delivery Amt. This amount is collected from the customer TODAY. If a different amount is collected, you will not balance in the cash drawer at the end of the day.

PMT 1 / PMT 2 The system allows for two different types of payments collected. For example, the customer has a coupon for a certain amount off and wants to pay part cash/check and use the coupon for the rest of the payment required. 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 and enter the amount given for that payment form. If you need to enter the second payment type, enter the form of that type and then enter the amount. Press enter.

PMT TERMS This information is carried over from previous screen.

AMT RECEIVED This field is an automatically generated total of all payments received. Press enter.

CHANGE DUE Automatically calculates the change to be given to your customer.

Once you have filled in all the information, you will be prompted "Any Changes: N", see Figure 7-7.

New Agreement Add				02/23/10	
Customer Name: SMITH		, DON		Acct#: 112449	
Rate Of Pmt:	55.34	Rate Of Grp:	5.53	Rate Of ESP:	0.00
Rate Of Tax:	4.26	Ttl Reg Due:	65.13	Next Pmt Due:	3/02/10
Agreement Amt:	2,877.68	Agreement Bal:	2,877.68	Balloon Pmt:	
Delivery Amt:		1st Pmt Amt:	55.34	GRP/ESP Amt:	5.53
Deposit Amt:		Proc/Recycle:	/	Tax Amt:	4.26
Total Due:	65.13	Pmt 1:	1/ 65.13	Pmt 2:	/
Pmt Terms: W	52 Wks	Amt Received:	65.13	Change Due:	0.00
Serial Nbr	Pmt Amt	Spiff	ESP Amt	Serial Nbr	Pmt Amt
100028	46.46			106279	8.88
Any Changes: N					
F3-Calc Amt/Date		F4-Calc Date/Amt		F5-Help	
		F8-Backout		F10-Exit	

Figure 7- 7 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. If you have security authorization to do so, you may change this field.

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

You may get a prompt (on the bottom of the screen) "Transfer Inv Loc: Y". Press enter to accept the default of Y, 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 out following the receipt. You are prompted to enter "Delivery Note 1". Enter any information needed here for the delivery ticket and press enter. You can enter Delivery Notes 2 and 3 if needed. Enter any additional information needed here for the delivery ticket and press enter.

Recommendations for "Delivery Note" field: Type the 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. You will then be prompted to "Reprint the receipt: N"; you will need to change the defaulted answer to "Y" and another receipt will print.

If a club agreement was selected, follow the prompts for entering the club agreement number and press enter. At "Any Changes: Y", change the prompt to "N" to continue.

PRINT AGREEMENT Press the enter key to accept the default of Y for yes to print the agreement or enter a 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. If a club agreement is selected, you will be prompted to "Print Club Agmt". Press enter on the default of "Y" if yes, or enter a "N" for not to print.

Depending on your rent control record settings (RENTCTRL), the following prompt may appear, "**Would you like to post a sale?**" If you enter a Y for yes, you will be taken to a Sales Entry Screen to post a sale or sales items. If you enter a N for no, you will be returned to the Customer Maintenance screen.

Once you have completed the new agreement screens, in most cases you will be taken back to the Security Entry screen. Here you can login with your employee number to enter another new agreement or press F8 to go back to a menu.

Stock Rental

To process a new rental agreement without a specific serial number, follow the steps for Adding a New Rental Agreement until you get to the "Ticket Type" field on the first screen. Press the space bar for a list of choices shown in Figure 7-8.

```

New Agreement Add                                02/23/10
Customer Name: SMITH      , DON      Acct#: 112449
Salesmen Nbrs: 1
Acct Mgr Nbr: 1
Store Nbr: 101
Source: DN
Agreement Type: A
Tax Code:
Ticket Type:
Serial Nbr  Pmt Amt  Spiff  ESP Amt  Serial

Agreement Nbr:
Agreement
Delivery  0  Rent To Own
Cust      S  Special Order
Pmt T     F  Fee Ticket
Ticket    R  Rent To Rent
# BOR I   T  RTR Special Order

Enter an (0) for a Rent-To-Own agreement; space bar to list choices
F10-Exit                                ENTER>Select
  
```

Figure 7- 8 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 7-9.

```

New Agreement Add                                02/23/10
Customer Name: SMITH      , DON      Acct#: 112449
Salesmen Nbrs: 1
Acct Mgr Nbr: 1
Store Nbr: 101
Source: DN
Agreement Type: A
Tax Code:
Ticket Type: S
Serial Nbr  Pmt Amt  Spiff  ESP Amt  Serial Nbr  Pmt Amt  Spiff  ESP Amt

Agreement Nbr:
Agreement Date: 2/23/10
Delivery Date: 2/23/10
Cust Type: L
Pmt Terms: W
Ticket Nbr: 130679
# BOR Items:

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 7- 9 Stock Order F4 key Screen

After pressing the F4 key for Stock Orders, the screen will appear as in Figure 7-10.

```

New Agreement Add                                02/23/10
Customer Name: SMITH      , DON                  Acct#: 112449
Salesmen Nbrs: 1                      Agreement Nbr:
Acct Mgr Nbr: 1                      Agreement Date: 2/23/10
Store Nbr: 101                        Delivery Date: 2/23/10
Source: DN                            Cust Type: L
Agreement Type: A                      Pmt Terms: W
Tax Code:                              Ticket Nbr: 130679
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 7-10 Stock Order Screen

Enter the model number of the item you will be renting out or enter a few characters of the model number and press enter. You will be prompted to enter "M" to look up by model number or "D" to look up by description. See Figure 7-11. Using your arrow keys, highlight the model number you needed, and press enter.

```

New Agreement Add                                02/23/10
Customer Name: SMITH      , DON                  Acct#: 112449

FBASHB117-39  BEDROOM CHEST/ARMOIRE  X-CISS MEDIA CHEST SET
FBASHB117-6PC  BEDROOM GOOD                X-CISS MERLOT MASTER
FBASHB120-4PC  *BEDROOM YOUTH GOOD        APPLE CRISP YOUTH BEDROOM
FBASHB121-4PC  BEDROOM YOUTH GOOD        BLUE BERRY PIE YOUTH BED
FBASHB121-50   *BEDROOM OTHER             BLU BERRY PIE STORAGE
FBASHB121-92   *BEDROOM NIGHT STAND      BEDROOM NIGHT STAND
FBASHB122-4PC  BEDROOM YOUTH GOOD        STRAWBERRY ICE CREAM BORO
FBASHB122-50   *BEDROOM OTHER             STRAWBERRY CREAM STORAGE
FBASHB128-46   BEDROOM CHEST/ARMOIRE     HUEY CHEST
FBASHB128-6PC  BEDROOM GOOD                6 PC HUEY BEDROOM
FBASHB131-6PC  *BEDROOM BETTER           6PC SOUTHAVEN BEDROOM SE

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

Figure 7-11 Stock Order Screen model number lookup

Once you have chosen the correct model number, enter through the Fabric and Color fields. STOCK will appear under the "Serial Nbr" field. Press enter until your cursor is at the "Pmt Amt" field, see Figure 7-12. Continue with the new rental agreement as shown in [pages 4-8](#) of this section.

```

New Agreement Add                                02/23/10
Customer Name: SMITH          , DON              Acct#: 112449
Salesmen Nbrs: 1              Agreement Nbr:
Acct Mgr Nbr: 1              Agreement Date: 2/23/10
Store Nbr: 101              Delivery Date: 2/23/10
Source: DN                  Cust Type: L
Agreement Type: A          Pmt Terms: W
Tax Code:                  Ticket Nbr: 130679
Ticket Type: S            # BOR Items:
Serial Nbr Pmt Amt Spiff ESP Amt Serial Nbr Pmt Amt Spiff ESP Amt
STOCK      █ 6.00

Model Nbr: FBASHB117-39      Desc: BEDROOM CHEST/ARMOIRE      Loc:
Enter the rate of payment for this item

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

```

Figure 7-12 Stock Order Screen

To attach the serial number to this ticket later, refer to [Updating the RTO Agreement when the Stock or Special Order item has arrived](#) in this section.

Special Order Items

If the inventory is not in stock and you are going to order it for the customer, follow the steps for [Adding a New Rental Agreement](#) until you are at the "Ticket Type" field on the first screen. 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 7-13.

```

New Agreement Add                                03/15/10
Customer Name: SMITH          , DON              Acct#: 112449
Salesmen Nbrs: 2              Agreement Nbr:
Acct Mgr Nbr: 1              Agreement Date: 3/15/10
Store Nbr: 101              Delivery Date: 3/15/10
Source: TV                  Cust Type: L
Agreement Type: C          Pmt Terms: W
Tax Code:                  Ticket Nbr: 130708
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 7-13 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. You will be prompted to enter "M" to look up by model number or "D" to look up by description and press enter to choose the item from the list as shown in Figure 7-14.

```

New Agreement Add                                03/15/10
Customer Name: SMITH      , DON                  Acct#: 112449

FBASHB117-39  BEDROOM CHEST/ARMOIRE  X-CESS MEDIA CHEST SET
FBASHB117-6PC  BEDROOM GOOD  X-CESS MERLOT MASTER
FBASHB120-4PC  *BEDROOM YOUTH GOOD  APPLE CRISP YOUTH BEDROOM
FBASHB121-4PC  BEDROOM YOUTH GOOD  BLUE BERRY PIE YOUTH BED
FBASHB121-50  *BEDROOM OTHER  BLU BERRY PIE STORAGE
FBASHB121-92  *BEDROOM NIGHT STAND  BEDROOM NIGHT STAND
FBASHB122-4PC  BEDROOM YOUTH GOOD  STRAWBERRY ICE CREAM BDRO
FBASHB122-50  BEDROOM OTHR  STRAWBERRY CREAM STORAGE
FBASHB128-46  BEDROOM CHEST/ARMOIRE  HUEY CHEST
FBASHB128-6PC  BEDROOM GOOD  6 PC HUEY BEDROOM
FBASHB131-6PC  *BEDROOM BETTER  6PC SOUTHHAVEN BEDROOM SE

Model Nbr: FBASH      Fabric:      Color:
Fabric:              Color:

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

Figure 7-14 New Agreement Add Screen model number input

Using your arrow keys, highlight the model number you need, and press enter. If the model number is discontinued or does not exist, contact your company's individual/purchasing department to add the model number to the system. Your screen will now change to resemble Figure 7-15.

```

New Agreement Add                                03/15/10
Customer Name: SMITH      , DON                  Acct#: 112449

Salesmen Nbrs: 2      Agreemnt Nbr:
Acct Mgr Nbr: 1      Agreemnt Date: 3/15/10
Store Nbr: 101      Delivery Date: 3/15/10
Source: TV      Cust Type: L
Agreemnt Type: C      Pmt Terms: W
Tax Code:      Ticket Nbr: 130708
Ticket Type: S      # BOR Items:
Serial Nbr  Pmt Amt  Spiff  ESP Amt  Serial Nbr  Pmt Amt  Spiff  ESP Amt

Model Nbr: FBASHB122-50  Fabric:      Color:
Fabric:              Color:

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

Figure 7-15 New Agreement Add Screen model number input resulting screen

Press the F9 key and your screen will change to resemble Figure 7-16.

```

New Agreement Add                                03/15/10
Customer Name: SMITH          , DON              Acct#: 112449
Salesmen Nbrs: 2                Agreemnt Nbr:
Acct Mgr Nbr: 1                Agreemnt Date: 3/15/10
Store Nbr: 101                Delivery Date: 3/15/10
Source: TV                    Cust Type: L
Agreemnt Type: C              Pmt Terms: W
Tax Code:                    Ticket Nbr: 130708
Ticket Type: S                # BOR Items:
Serial Nbr Pmt Amt Spiff ESP Amt Serial Nbr Pmt Amt Spiff ESP Amt
SPEC ORDER
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 7-16 New Agreement Add Screen resulting special order screen

Press the enter key to accept the payment amount. Continue with completing the rental agreement as noted on [pages 4-8](#) of this section. When the special order/stock item is received, refer to [Changing and Closing Special Order Tickets](#) in this section.

Updating the RTO Agreement when the Special Order or Stock 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 inventory transfer (INVTRAN) program. To attach the serial number to this ticket refer to the instructions in [Transferring Inventory – Option 4, pages 12-15](#).

Changing and Closing Special Order Tickets

Special Order tickets can be changed or more items can be added using the Customer Menu option “Change Rental Agreement – RTOCSMNT” program. Please refer to [Changing Agreement Data](#) for more information on how to change a rental agreement.

Removal of Special/Stock Order items are done in the Daily Customer Service Menu option “Return/Close Rental” program. Please refer to [Closing a Rental Agreement](#) for more information on how to close a rental agreement.

NOTE: 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 7-17.

```

Close RTO Tickets                                03/15/10
Name: SMITH , DON                               Store: 101 Acct#: 112449
Rate Of Pmt: 27.00 Rate Of Grp: 2.70 Rate Of ESP: 0.00
Rate Of Tax: 2.00 Ttl Reg Due: 31.78 Next Pmt Due: 3/15/10
Agreemnt Amt: 1,404.00 Agreemnt Bal: 1,404.00 # BOR Items:
Pmt Terms: W Agreemnt Type: 52 WEEKS Balloon Pmt: 0.00
Model Nbr Serial Nbr Pmt Amt Spiff Agreemnt Date Agreemnt Bal
FBASHB122-50 SPEC ORDER 27.00 █ 3/15/10 1404.00

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

Figure 7-17 Close RTO Tickets Screen Special Order ticket

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

To add a new short term rental agreement (RTR), select R for Rent to Rent in the "Ticket Type" field. Continue with the rental agreement add as noted on [pages 4-8 in this section](#). See Figure 7-18.

```

New Agreement Add                                02/24/10
Customer Name: SMITH , DON Acct#: 112449
Salesmen Nbrs: 2 Agreemnt Nbr:
Acct Mgr Nbr: 1 Agreemnt
Store Nbr: 101 Delivery 0 Rent To Own
Source: TV Cust S Special Order
Agreemnt Type: C Pmt T F Fee Ticket
Tax Code: Ticket R Rent To Rent
Ticket Type: # BOR I Y RTR Special Order
Serial Nbr Pmt Amt Spiff ESP Amt Serial

Enter an (0) for a Rent-To-Own agreement; space bar to list choices

F10-Exit ENTER>Select
  
```

Figure 7-18 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 7-19.

```

New Agreement Add                                02/24/10
Customer Name: SMITH      , DON      Acct#: 112449
Salesmen Nbrs: 2
Acct Mgr Nbr: 1
Store Nbr: 101
Source: DN
Agreement Type: C
Tax Code:
Ticket Type: F Fee Type:
Serial Nbr Pmt Amt Spiff ESP Amt

Agreement Nbr:
Agreement Delivery
Cust C Club
T 0 Other

Ticket # BOR I
Serial

Enter an (0) for a Rent-To-Own agreement; space bar to list choices

F10-Exit                                ENTER-Select

```

Figure 7-19 New Agreement Add Screen Ticket Type F for Fee Ticket

The next prompt is "Fee Type". Press enter for the fee type options. Highlight your selection and press enter. 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 7-20.

```

New Agreement Add                                02/24/10
Customer Name: SMITH      , DON      Acct#: 112449
Salesmen Nbrs: 2
Acct Mgr Nbr: 1
Store Nbr: 101
Source: DN
Agreement Type: C
Tax Code:
Ticket Type: F Fee Type: OTHER FEE
Serial Nbr Pmt Amt Spiff ESP Amt

Agreement Nbr:
Agreement Date: 2/24/10
Delivery Date: 2/24/10
Cust Type: L
Pmt Terms: W
Ticket Nbr: 130686
BOR Items:

Any Changes: N

F8-Backout                                F10-Exit

```

Figure 7-20 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 with the rest of the rental agreement add as shown on *pages 5-8* of this section.

Taking a Free Payment When Adding a New Agreement

Note: Before you can take a free payment on a new agreement, the type of free payment codes have to be set up in the Discount/Promotion Codes program called "DPCODES". A promotional code is set up in "DPCODES" based on your company's preferences for the types of free payments you will be accepting.

Follow the instructions on the previous pages for entering an agreement. When you get to the second screen of "New Agreement Add", at the "Pmt 1" field, begin using the following instructions. See Figure 7-21.

02/24/10

Customer Name: SMITH , DON Acct#: 112449

Rate Of Pmt: 45.00	Rate Of Grp: 4.50	Rate Of ESP: 0.00
Rate Of Tax: 3.47	Ttl Reg Due: 52.97	Next Pmt Due: 3/02/10
Agreement Amt: 2,340.00	Agreement Bal: 2,340.00	Balloon Pmt:
Delivery Amt:	1st Pmt Amt: 38.57	GRP/ESP Amt: 3.86
Deposit Amt:	Proc/Recycle: /	Tax Amt: 2.97
Total Due: 45.40	Pmt 1: / 45.40	Pmt 2: /
Pmt Terms: W 52 Wks	Amt Received:	
Serial Nbr 555555	Pmt Amt 45.00	Spiff ESP Amt:

CASH	001
CHECKS	002
MONEY ORDERS	003
CHARGE CARDS	004
NON CASH REFUND	005
CASH REFUND	006
DEBIT CARD/LEFT	007
FREE PAYMENT	008
MIXED (CASH & CHECK)	009

Method of paying (ENTER)

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

Figure 7-21 New Agreement Add Screen taking a free payment

At the first field "Pmt 1" enter "8-Free Payment". A window will now open from which you need to pick a promotional code, see Figure 7-22.

New Agreement Add 02/24/10

Customer Name: SMITH, DON Acct#: 112449

Rate Of Pmt: 45.00	Rate Of Grp: 4.50	Rate Of ESP: 0.00
Rate Of Tax: 3.47	Ttl Reg Due: 52.97	Next Pmt Due: 3/03/10
Agreement Amt: 2,340.00	Agreement Bal: 2,340.00	Balloon Pmt:
Delivery Amt:	1st Pmt Amt: 45.00	GRP/ESP Amt: 4.50
Deposit Amt:	Proc/Recycle: /	Tax Amt: 3.47
Total Due: 52.97	Pmt 1: 8/ 52.97	Pmt 2: /
Pmt Terms: W 52 Wks	Amt Received:	Change Due: 0.00
Serial Nbr Pmt Amt Spiff ESP Amt		
555555 45.00		

REFERRAL PROMO	1
MANAGER'S SPECIAL	2
EARLY BUYOUT COUPON	3
ADVERTISING PROMOTION	4

Method of paying (ENTER)

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

Figure 7-22 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" prompt. Enter the amount of the free payment. See Figure 7-23.

New Agreement Add 02/24/10

Customer Name: SMITH, DON Acct#: 112449

Rate Of Pmt: 45.00	Rate Of Grp: 4.50	Rate Of ESP: 0.00
Rate Of Tax: 3.47	Ttl Reg Due: 52.97	Next Pmt Due: 3/03/10
Agreement Amt: 2,340.00	Agreement Bal: 2,340.00	Balloon Pmt:
Delivery Amt:	1st Pmt Amt: 45.00	GRP/ESP Amt: 4.50
Deposit Amt:	Proc/Recycle: /	Tax Amt: 3.47
Total Due: 52.97	Pmt 1: 8/ 52.97	Pmt 2: /
Pmt Terms: W 52 Wks	Amt Received: 52.97	Change Due: 0.00
Serial Nbr Pmt Amt Spiff ESP Amt	Serial Nbr Pmt Amt Spiff ESP Amt	
555555 45.00		

The total amount entered in pmt 1 and 2

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

Figure 7-23 New Agreement Add Screen total due prompt for free payment

The example in Figure 7-24 indicates a free payment of \$20.00 and the cash the customer pays is \$32.97 for a total of \$52.97.

```

New Agreement Add                                02/24/10
Customer Name: SMITH      , DON                Acct#: 112449
Rate Of Pmt: 45.00      Rate Of Grp: 4.50      Rate Of ESP: 0.00
Rate Of Tax: 3.47      Ttl Reg Due: 52.97      Next Pmt Due: 3/03/10
Agreemnt Amt: 2,340.00  Agreemnt Bal: 2,340.00      Balloon Pmt:
Delivery Amt:          1st Pmt Amt: 45.00      GRP/ESP Amt: 4.50
Deposit Amt:          Proc/Recycle: /          Tax Amt: 3.47
Total Due: 52.97      Pmt 1: 8/ 20.00      Pmt 2: 1/ 32.97
Pmt Terms: W 52 Wks  Amt Received: 52.97      Change Due: 0.00
Serial Nbr Pmt Amt Spiff ESP Amt Serial Nbr Pmt Amt Spiff ESP Amt
555555      45.00
  
```

The total amount entered in pmt 1 and 2

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

Figure 7-24 New Agreement Add Screen total amount equals pmt amounts

Once you have filled in all the information, press the F9 key. You will be prompted with "Any Changes: N". If no changes, press enter to accept the default. (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. If it is not correct and you have security authorization to do so, you may enter the correct Cash Selling Price here.

You will be prompted with "Any Changes: N". If you don't have any changes, press the enter key. See Figure 7-25.

```

New Agreement Add                                02/24/10
Customer Name: SMITH      , DON                Acct#: 112449
Rate Of Pmt: 45.00      Rate Of Grp: 4.50      Rate Of ESP: 0.00
Rate Of Tax: 3.47      Ttl Reg Due: 52.97      Next Pmt Due: 3/03/10
Agreemnt Amt: 2,340.00  Agreemnt Bal: 2,340.00      Balloon Pmt:
Delivery Amt:          1st Pmt Amt: 45.00      GRP/ESP Amt: 4.50
Deposit Amt:          Proc/Recycle: /          Tax Amt: 3.47
Total Due: 52.97      Pmt 1: 8/ 20.00      Pmt 2: 1/ 32.97
Pmt Terms: W 52 Wks  Amt Received: 52.97      Change Due: 0.00
Serial Nbr Pmt Amt Spiff ESP Amt Serial Nbr Pmt Amt Spiff ESP Amt
555555      45.00

Any Changes: N
  
```

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

Figure 7-25 New Agreement Second Screen

Continue with completing the rental agreement as noted on pages 5-8 of this section.