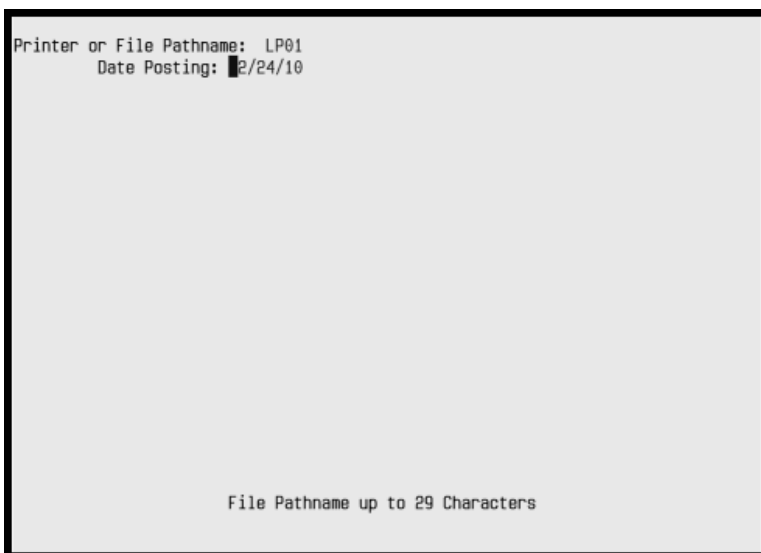


Chapter 8 - Changing Agreement Data – RTOCSMNT

To change an agreement, select “Change Rental Agreement” from the Customer Menu or press the F10 key and at the command line type in “RTOCSMNT”. 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 8-1. You will be prompted for “Date Posting”. Type in the date you want this posted on or press the enter key to accept the default of today’s date.



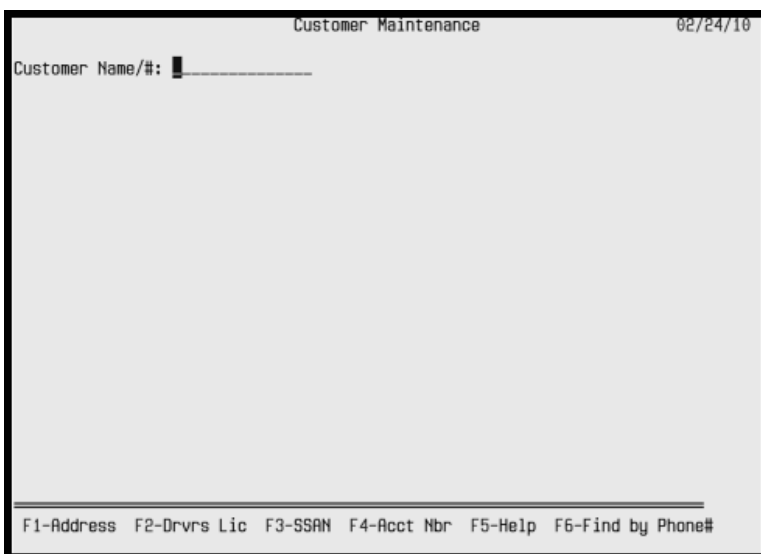
```

Printer or File Pathname: LP01
Date Posting: 02/24/10

File Pathname up to 29 Characters
  
```

Figure 8- 1 Change Rental Agreement First Screen

The next screen will allow you to select the customer information. See [Lookup/Change/Add Customer Data, pages 1-4](#). See Figure 8-2.



```

Customer Maintenance 02/24/10
Customer Name/#: _____

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

Figure 8- 2 Customer Maintenance Screen

Once you find and select the customer, you may be prompted to enter a ticket number. See Figure 8-3.

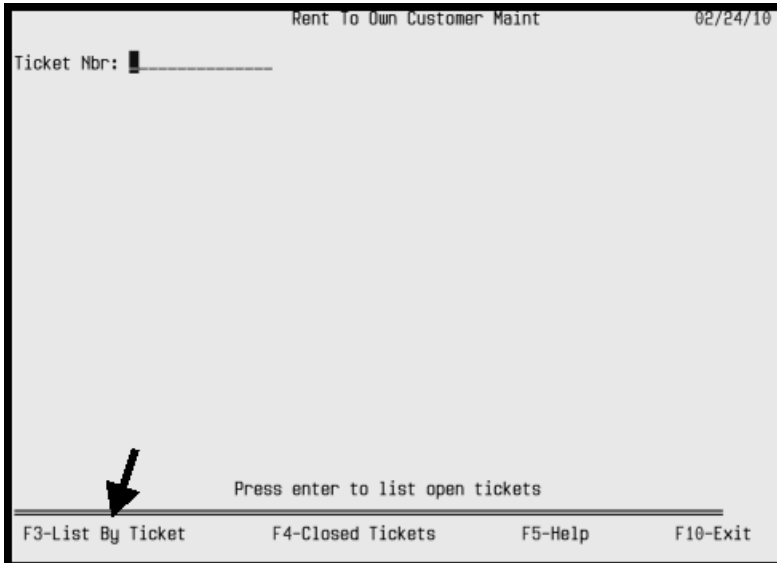


Figure 8- 3 Rent To Own Customer Maint Screen

Press the F3 key or press enter here to list the open tickets. See Figure 8-4. Or you can press the F4 key and then the F3 key and the closed tickets will be listed.

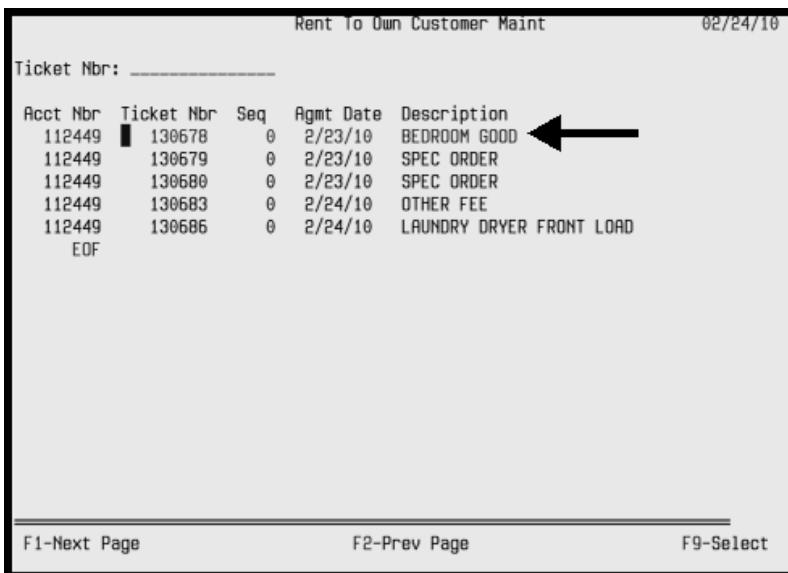


Figure 8- 4 Agreements listed to select from to change

Once you have a list of open tickets, highlight the agreement/ticket you want to change using your up and down arrow keys and press the enter key. The cursor will move to the sequence number of the ticket field. Press the enter key to bring up the first change screen. See Figure 8-5.

```

Rent To Own Customer Maint      02/24/10
Name: SMITH      , DON      Acct#: 112449 Ticket#: 130678

Salesmen Nbrs: 2      Agreemnt Nbr:
Acct Mgr Nbr: 1      Agreemnt Date: 2/23/10
Store Nbr: 101      Source: FL
Cust Type: L      Agreemnt Type: C
Tax Code:      Pmt Terms: W
# BOR Items:      # Times Late: 0
Ticket Flag:      Deposit Amt: 0.00

-----
F5-Help      F8-Backout      F9-Second Screen      F10-Exit

```

Figure 8- 5 First Screen for Change Agreement

Below is a list of definitions for the field on this screen.

SALESMEN NBR Shows the employee number(s) of the salesperson(s) who wrote up the rental. If you do not know the salesperson's number, enter a zero or 99999 and press the enter key to select the salesperson number from a selection window list. If more than one salesperson worked on this rental, enter the second salesperson's number at the second prompt. If more than two salespeople worked on this rental, enter the third salesperson's number at the third prompt.

AGREEMNT NBR Shows the agreement number. If your company uses pre-printed agreements with sequential numbers, you may enter the pre-printed agreement number here. If not, press the enter key to skip.

ACCT MGR NBR Shows the Account Manager's Number that is responsible for this account. This normally defaults to the first salesperson's number entered in the "Salesmen Nbrs" first field prompt. If this is not correct, you may change it if you have the security to do so.

AGREEMNT DATE Shows the date the agreement was set up.

STORE NBR Shows the store location number this agreement is for.

SOURCE Shows the advertising source that is responsible for bringing the customer into your store. If you need to change this, but are unsure of the advertising code, clear the field and press the enter key to get a selection window. You may enter up to three different advertising codes.

CUST TYPE Shows the customer type code for this customer. If you need to change this but do not know the code, clear the field to display the selection window to choose the customer type for this agreement.

AGREEMNT TYPE Shows the agreement type code. If you need to change it and do not know the code, clear the field and press the enter key for a selection window to choose the agreement type from.

TAX CODE Shows the tax code on this agreement. This field is primarily used for stores that service customers within an area that has multiple tax jurisdictions and are required to collect taxes at several different rates. Enter the tax code if it applies in your company's or store's case (this field is not the percentage (%) of tax).

PMT TERMS This is the code for the payments terms, i.e. monthly, weekly, semi-monthly and so on). This is the frequency the customer will come in and make payments. If you need to change the payment terms and do not know the code, clear the field and press the enter key to choose the pmt terms from a selection window.

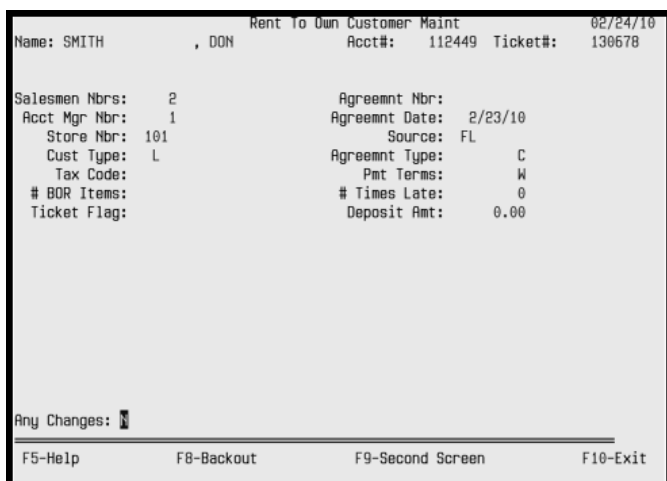
BOR ITEMS This Balance on Rent field can be left blank and the system will count Balance on Rent as indicated in your company's policy. If your company requires you to enter the # of BOR Items so that the items are counted differently for this agreement, enter the number here otherwise leave it blank.

TIMES LATE Shows the number of times this customer has been late on making payments on this account.

TICKET FLAG This is a free form two character field that you can code in any way that company chooses or it can be left blank.

DEPOSIT AMT Shows the deposit amount paid on the agreement.

Once your changes are complete or if you are just accepting the data entered on the first agreement change screen, press the F9 key and at the "Any Changes" prompt, press the enter key to accept the default of N for no more changes to that screen. See Figure 8-6.



```

Rent To Own Customer Maint      02/24/10
Name: SMITH      , DON      Acct#: 112449      Ticket#: 130678

Salesmen Nbrs: 2      Agreemnt Nbr:
Acct Mgr Nbr: 1      Agreemnt Date: 2/23/10
Store Nbr: 101      Source: FL
Cust Type: L      Agreemnt Type: C
Tax Code:      Pmt Terms: W
# BOR Items:      # Times Late: 0
Ticket Flag:      Deposit Amt: 0.00

Any Changes: N

F5-Help      F8-Backout      F9-Second Screen      F10-Exit
  
```

Figure 8- 6 "Any Changes" prompt

The next screen that will appear will be the same screen with a different prompt asking you "Want Second Screen". See Figure 8-7.

```

Rent To Own Customer Maint      02/24/10
Name: SMITH      , DON      Acct#: 112449 Ticket#: 130678

Salesmen Nbrs: 2      Agreemnt Nbr:
Acct Mgr Nbr: 1      Agreemnt Date: 2/23/10
Store Nbr: 101      Source: FL
Cust Type: L      Agreemnt Type: C
Tax Code:      Pmt Terms: W
# BOR Items:      # Times Late: 0
Ticket Flag:      Deposit Amt: 0.00

Want Second Screen: N

F5-Help      F8-Backout      F9-Second Screen      F10-Exit
  
```

Figure 8-7 "Want Second Screen" prompt

Change the N for no to a Y for yes if you want the second screen to appear so that you can make changes to the second screen. The cursor will reside on the payment amount once the second screen comes up. See Figure 8-8.

```

Rent To Own Customer Maint      02/24/10
Name: SMITH      , DON      Acct#: 112449 Ticket#: 130678
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
Agreemnt Amt: 2,877.68      Agreemnt Bal: 2,822.34      Balloon Pmt: 0.00
Pmt Terms: W      Agreemnt Type: 52 WEEKS
Model Nbr      Serial Nbr      Pmt Amt      Spiff      ESP Amt      Agreemnt Date
FBSIGB154-6PC      100028      46.46      2/23/10
FDASHL127924      106279      8.88      2/23/10

Re-Open and Add Item Options Only Valid On Blank Line

F1-Re-Open Item      F2-Exchange Item      F3-Add Item      F5-Help      F8-Backout
  
```

Figure 8-8 Second Screen for Change Agreement

The cursor will move (when you press the enter key) from PMT AMT to SPIFF AMT to AGREEMENT DATE. If you need to change any of these fields, do so when the cursor is at that prompt. After you have made any changes in this area that are necessary, press the F9 key. You will be prompted "Any More Changes". Press the enter key to accept the default of N for no more changes.

Note: If you made a change that affects the contract amount, you will see "Agreement Amount Recalculated Continue?" See Figure 8-9. If the figure is correct, answer the question with a Y for yes. An "N" will return you to the ticket number and no changes will take place.

```

Rent to Own Customer Maint                                02/24/10
Name: SMITH , DON Acct#: 112449 Ticket#: 130678
Rate Of Pmt: 31.62 Rate Of Grp: 3.16 Rate Of ESP: 0.00
Rate Of Tax: 2.43 Ttl Reg Due: 37.21 Next Pmt Due: 3/02/10
Agreemnt Amt: 2,877.42 Agreemnt Bal: 2,822.08 Balloon Pmt: 0.00
Pmt Terms: W Agreemnt Type: 91 WEEKS
Model Nbr Serial Nbr Pmt Amt Spiff ESP Amt Agreemnt Date
FBSIGB154-6PC 100028 26.55
FORSHL127924 106279 5.07
Agreement Amount Recalculated;Continue: Y
F5-Help F8-Backout F9-Update Record F10-Exit

```

Figure 8- 9 Second Screen with Agreement Amount Recalculated Prompt

How to change the payment terms on an agreement

To change the payment terms on an agreement, you will make changes to the fields AGREEMNT TYPE and PMT TERMS on the first change screen. If you do not know the code for one of these, just clear the field and a selection window will appear where you can choose the correct code by using your up and down arrow keys to highlight the correct selection you want to change the agreement to. See Figure 8-10.

```

Rent To Own Customer Maint      02/24/10
Name: SMITH          , DON      Acct#: 130678
Salesmen Nbrs:      2            Agreement
Acct Mgr Nbr:      1            Agreement Date: 2/23/10
Store Nbr:      101            Source: FL
Cust Type:      L            Agreement Type: 5
Tax Code:
# BOR Items:
Ticket Flag:
# Times Late:      0
Deposit Amt:      0.00

F5-Help      F8-Backout      F9-Second Screen      F10-Exit
  
```

changed from 52 to 91 weeks

Figure 8- 10 First Screen Change Payment Terms on an Agreement

Press the F9 key and accept the changes by pressing the enter to accept the default of N for no at the "Any More Changes" prompt.

You will automatically see the second screen in this case. See Figure 8-11.

```

Rent To Own Customer Maint      02/24/10
Name: SMITH          , DON      Acct#: 112449 Ticket#: 130678
Rate Of Pmt:      31.62      Rate Of Grp:      5.53      Rate Of ESP:      0.00
Rate Of Tax:      4.26      Ttl Reg Due:      41.41      Next Pmt Due:      3/02/10
Agreement Amt: 2,877.68      Agreement Bal: 2,822.34      Balloon Pmt:      0.00
Pmt Terms: W            Agreement Type: 91 WEEKS
Model Nbr      Serial Nbr      Pmt Amt      Spiff      ESP Amt      Agreement Date
FBSIGB154-6PC      100028      26.55
FORSHL127924      106279      5.07      2/23/10
2/23/10

Re-Open and Add Item Options Only Valid On Blank Line

F1-Re-Open Item      F2-Exchange Item      F3-Add Item      F5-Help      F8-Backout
  
```

Figure 8-11 Second Screen for Change Payment Terms on an Agreement

The cursor will be on the PMT AMT field. The system will have automatically adjusted the payment amount to the new payment amount. After you have made any changes to the second screen that are necessary, press the F9 key and you will be prompted "Any More Changes". An N will take you to the top of the RATE OF GRP field on the second screen. Fields may re-compute based on changes to either one

of the screens. Make any additional changes necessary to the top of the screen and press the F9 key. You will be prompted "Any More Changes".

An N will bring up the prompt "Agreement Amount Recalculated. Continue?" See Figure 8-9. If the figure is correct, answer the question with a Y for yes and reprint agreement if necessary. An "N" will return you to the ticket number and no changes will take place.

How to handle an exchange of inventory

To access this program, select "Customer Maintenance" off the Home Menu, then select "Change Rental Agreement" off the RTO Customer Menu or press the F10 key off of any menu and at the command line, type in "RTOCSMNT". Find the customer and ticket you want to do the exchange on. See Figure 8-12. There are no changes to make to this screen so press the F9 key. You will be prompted "Any Changes". Press the enter key to accept the default of N for no.

Name: SMITH, DON		Rent To Own Customer Maint		02/24/10	
Acct#: 112449		Ticket#: 130686			
Salesmen Nbrs:	2	Agreement Nbr:			
Acct Mgr Nbr:	1	Agreement Date:	2/24/10		
Store Nbr:	101	Source:	DN		
Cust Type:	L	Agreement Type:	C		
Tax Code:		Pmt Terms:	W		
# BOR Items:		# Times Late:	0		
Ticket Flag:		Deposit Amt:	0.00		

F5-Help F8-Backout F9-Second Screen F10-Exit

Figure 8-12 Exchange First Screen

You will now be prompted "Want Second Screen". Enter a Y for yes and your cursor will reside on the payment amount field. See Figure 8-13.

```

Rent To Own Customer Maint      02/24/10
Name: SMITH , DON              Acct#: 112449 Ticket#: 130686
Rate Of Pmt: 113.99           Rate Of Grp: 11.40           Rate Of ESP: 0.00
Rate Of Tax: 8.78             Ttl Reg Due: 134.17       Next Pmt Due: 3/03/10
Agreemnt Amt: 5,813.72        Agreemnt Bal: 5,813.72   Balloon Pmt: 0.00
Pmt Terms: W                  Agreemnt Type: 52 WEEKS
Model Nbr                      Serial Nbr  Pmt Amt  Spiff  ESP Amt  Agreemnt Date
ALAMANED7200TW                555555    45.00
ALFRIGTLF2940ES              XC71923400 45.88
ARFRIFFC0923DW               WB71330055 23.11
  
```

Re-Open and Add Item Options Only Valid On Blank Line

F1-Re-Open Item F2-Exchange Item F3-Add Item F5-Help F8-Backout

Figure 8-13 Exchange Second Screen

Press the enter key or use your down arrow key until you get on the line of the serial number you want to exchange and press the F2-Exchange Item key.

Enter the serial number of the new item and press the enter key. You can also use F1 or F2 to search for a serial number. The system will automatically display the payment on this item as it is set in the RSSS Automatic Pricing. The bottom of the screen will display the old payment amount which is the rate of payment the item had that this item was exchanged for. Enter the amount at the payment amount field for this item.

Note: If you change the PMT AMT from what it was, the agreement amount will be changed and the system will then prompt you for Cash Selling Price. Press F9 to accept the new price.

At the "Exchange item" prompt, enter a Y for yes if you are ready to do the exchange. See Figure 8-14.

```

Rent To Own Customer Maint      02/24/10
Name: SMITH      , DON      Acct#: 112449 Ticket#: 130686
Rate Of Pmt:    113.99 Rate Of Grp:    11.40 Rate Of ESP:    0.00
Rate Of Tax:    8.78  Ttl Reg Due:    134.17 Next Pmt Due:    3/03/10
Agreemnt Amt:  5,813.72  Agreemnt Bal:  5,813.72  Balloon Pmt:    0.00
  Pmt Terms: W      Agreemnt Type: 52 WEEKS
Model Nbr      Serial Nbr  Pmt Amt  Spiff  ESP Amt  Agreemnt Date
ALAMANED7200TW      555556      45.00
ALFRIGTLF2940ES      XC71923400      45.88
ARFRIFFC0923DW      WB71330055      23.11
  
```

Old Pmt Amt: 45.00

Exchange Item:

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

Figure 8-14 Exchange Item Prompt

You will now be prompted "Exchange reason". See Figure 8-15.

```

Rent To Own Customer Maint      02/24/10
Name: SMITH      , DON      Acct#: 112449 Ticket#: 130686
Rate Of Pmt:    113.99 Rate Of Grp:    11.40 Rate Of ESP:    0.00
Rate Of Tax:    8.78  Ttl Reg Due:    134.17 Next Pmt Due:    3/03/10
Agreemnt Amt:  5,813.72  Agreemnt Bal:  5,813.72  Balloon Pmt:    0.00
  Pmt Terms: W      Agreemnt Type: 52 WEEKS
Model Nbr      Serial Nbr  Pmt Amt  Spiff  ESP Amt  Agreemnt Date
ALAMANED7200TW      555556      45.00
ALFRIGTLF2940ES      XC71923400      45.88
ARFRIFFC0923DW      WB71330055      23.11
  
```

Exchange Reason:

1) Stolen 2) Damaged 3) Cust Request 4) Service Pbm

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

Figure 8-15 Exchange Reason Prompt

Enter the appropriate number selection for the reason for this item exchange. The cursor will now go back to the serial number list in case you have any other exchanges to make. There will be an E displayed to the left of the serial number field for the item you are even exchanging. See Figure 8-16.

```

Rent To Own Customer Maint                                02/24/10
Name: SMITH , DON Acct#: 112449 Ticket#: 130686
Rate Of Pmt: 113.99 Rate Of Grp: 11.40 Rate Of ESP: 0.00
Rate Of Tax: 8.78 Ttl Reg Due: 134.17 Next Pmt Due: 3/03/10
Agreemnt Amt: 5,813.72 Agreemnt Bal: 5,813.72 Balloon Pmt: 0.00
Pmt Terms: W Agreemnt Type: 52 WEEKS
Model Nbr Serial Nbr Pmt Amt Spiff ESP Amt Agreemnt Date
ALAMANE7200TW E 555556 45.00 2/24/10
ALFRIGTLF2940ES XC71923400 45.88 2/24/10
ARFRIFFC0923DW WB71330055 23.11 2/24/10

Re-Open and Add Item Options Only Valid On Blank Line

F1-Re-Open Item F2-Exchange Item F3-Add Item F5-Help F8-Backout
  
```

Figure 8-16 Exchange Indicator

If there are no more changes, press the F9 key and you will get the “Any Changes” prompt. Press the enter key to accept the default of N for no. You will now have the opportunity to make any other changes to the agreement such as GRP, ESP, etc. Once you have made your changes or if there are no more changes to make, press the F9 key to drop down to “Any Changes”. You will be prompted to recalculate agreement amount. Enter a Y to recalculate. If you change the PMT AMT you will be prompted to recalculate agreement amount, enter a Y to recalculate. See Figure 8-17.

```

Rent To Own Customer Maint                                02/24/10
Name: SMITH , DON Acct#: 112449 Ticket#: 130686
Rate Of Pmt: 113.99 Rate Of Grp: 11.40 Rate Of ESP: 0.00
Rate Of Tax: 8.78 Ttl Reg Due: 134.17 Next Pmt Due: 3/03/10
Agreemnt Amt: 5,813.49 Agreemnt Bal: 5,813.49 Balloon Pmt: 0.00
Pmt Terms: W Agreemnt Type: 52 WEEKS
Model Nbr Serial Nbr Pmt Amt Spiff ESP Amt Agreemnt Date
ALAMANE7200TW E 555556 45.00 2/24/10
ALFRIGTLF2940ES XC71923400 45.88 2/24/10
ARFRIFFC0923DW WB71330055 23.11 2/24/10

Agreement Amount Recalculated;Continue: N

F5-Help F8-Backout F9-Update Record F10-Exit
  
```

Figure 8-17 Exchange Item Second Screen

You will now be prompted “Print Agreement”. Print a copy of the agreement and get the customer to sign. An exchange ticket will be printed showing all the important information.