

integraRental 19.0

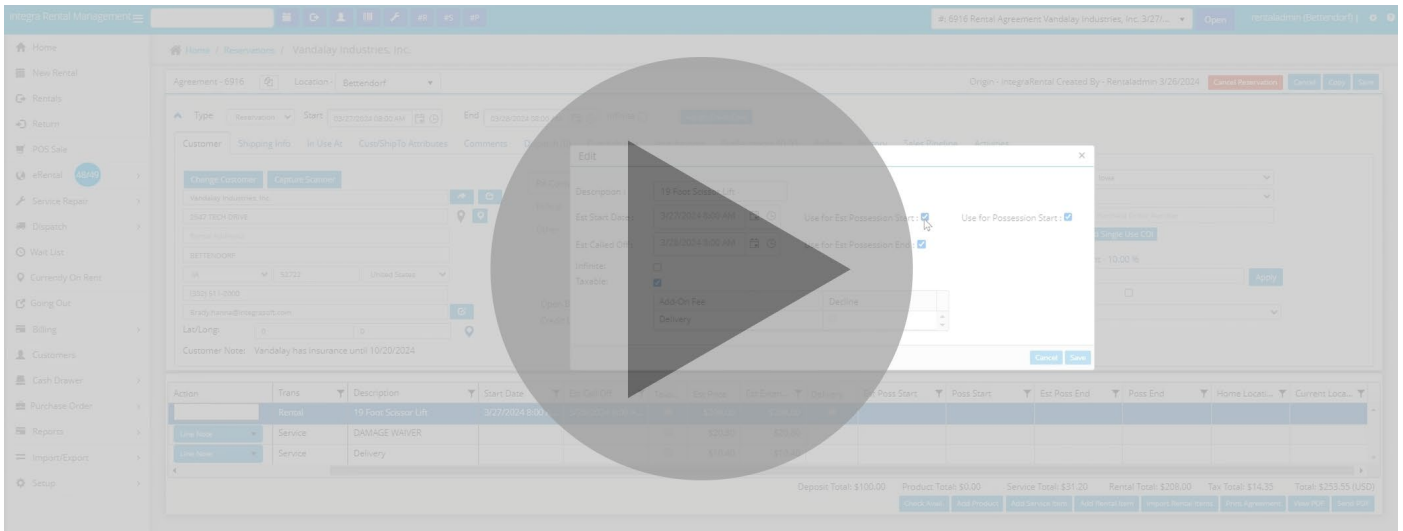
Our Most Impactful Release Ever

Updates starting April 10, 2024

integraRental release 19.0 is feature-rich with enhancements to your day-to-day business operations. Within this release are major improvements to finding related items, calling off rentals, service in mobile, customer credit, and more. Get a firsthand look at some of the most significant 19.0 additions by viewing the complete release notes below. We look forward to your feedback on this exciting new release and how it positively impacts your business.

Brand New to integraRental 19.0

Separating Billing from Customer Possession (Call-Offs) – We now support early customer pickup or delivery, and/or late customer drop off or pickup outside of the billing period. This not only gives you the ability to know exactly who is in possession of your asset, with the separation of possession and call-off, but also the ability to track availability outside of the billable rental period.



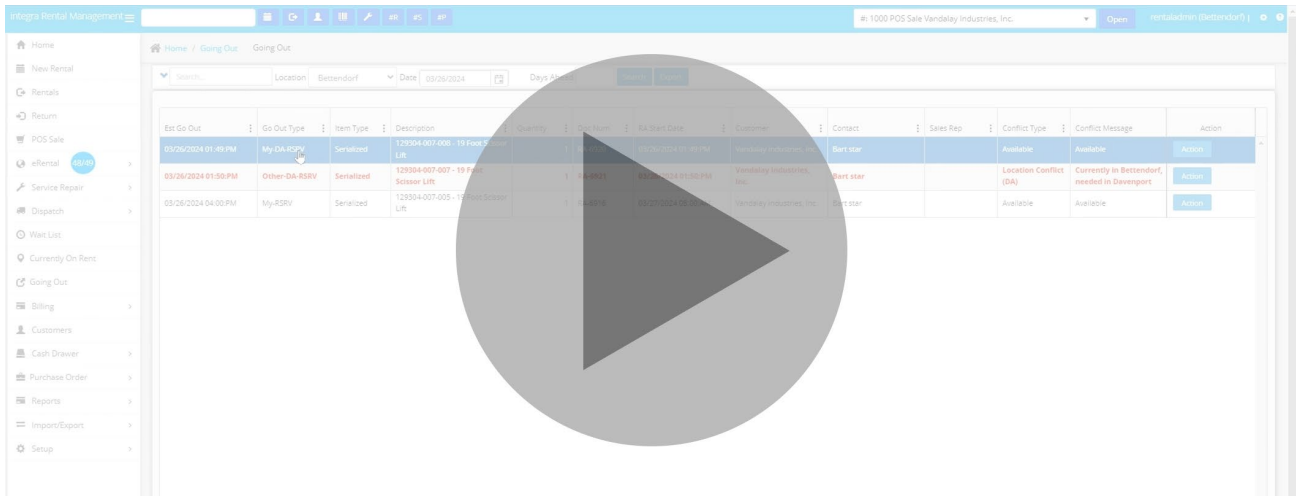
Rentals List - Change Status & One New Status – A new view to show everyone what is going out today. This is a configurable grid with views so that a user can understand the going out needs of the business for their location and the ability to project ahead on the going out needs.

Find Available Assets Faster (New Daily Availability Pop-Up) – Clicking on a box on the 28-day view will now bring up a new pop-up showing all the availability windows for an asset for the day.

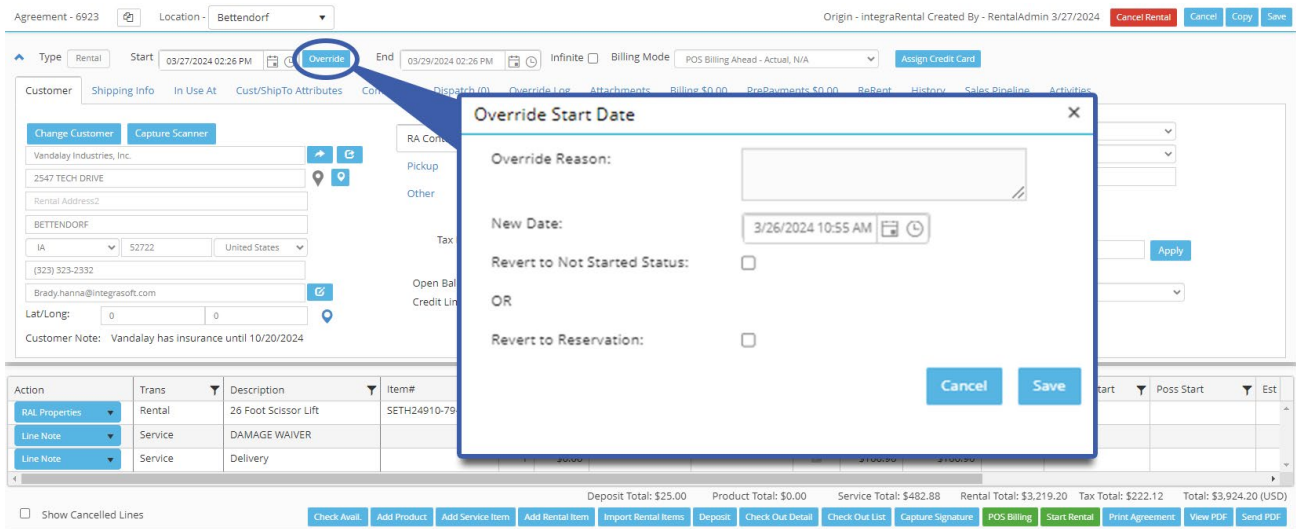
Availability on - 02/20/2024 for 19 Foot Scissor Lift

Type	Start	End	Location	Customer	Quantity	Agreement #	Action
Available	02/20/2024 07:00 AM	02/20/2024 01:00 PM					Action ▾
DispatchDelivery	02/20/2024 01:03 PM	02/20/2024 01:02 PM	Bettendorf	Vandalay Industries	1	6829	Action ▾
Rent	02/20/2024 01:03 PM	04/16/2024 01:03 PM	Bettendorf	Vandalay Industries	1	6829	Action ▾

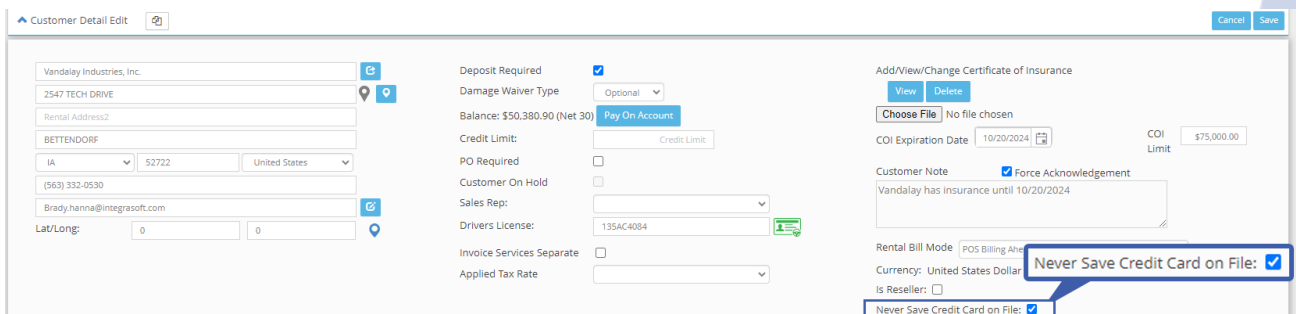
New View! "Going Out" – A new powerful view accounting for anything set to leave a location for the filtered date. This view also greatly enhances conflict management capability by alerting the user to conflict (in red highlighted text), or potential conflict (in mustard orange text).



Revert to Reservation – Revert started rental agreements back to reservation status. If a billing event has occurred, delete the billing event, and use the start date override button to revert to reservation.



New Customer Credit Card Management Options – Release 19 brings a new customer setting, "Never Save Credit Card on File", that prevents saving credit cards used by that customer. We have also added a button on payment tendering screens labeled "Swipe Only". If "Swipe Only" is used, the credit card will not be saved to the customer record.



Metered Hour Attribute Error Prevention – This feature prevents users from entering more metered hours than possible during a rental period. Example: Customer rented from 8:00 am Monday to 8:00 am Tuesday morning. This feature will not allow them to enter more than 24 hours of use during that time.

Check in Additional Information Collapse All Expand All Show All X

Metered Hours entered (10000 hrs) cannot exceed total hours of the rental period (1318.05 hrs)

Attribute Name	R/O	Default	Match	Check Out Value	Check In Value	Diff	Overage Charge	Check Out Changed By	Check Out Changed Date	Check In Changed By	Check In Changed Date
19 Foot Scissor Lift-39204938939 02/01/2024 10:11 AM Attachment <input type="text"/> <input type="button" value="Create Service Ticket"/>											
Fuel Level	R	20	Level C... ▾	20	20	0	\$0.00	rentaladmin	03/27/2024 09:12 AM		
Metered Hours	R	10	➔	10	10000	9990.00	\$145,050.00	rentaladmin	03/27/2024 09:12 AM		
Safety Harness Count	R	1	➔	1			\$0.00	rentaladmin	03/27/2024 09:12 AM		
Safety Instruction Sheet Present	R	Yes	➔	Yes			\$0.00	rentaladmin	03/27/2024 09:12 AM		

Drag & Drop Rental Agreement Line Order – This highly requested feature enables a user to arrange rental lines to their preference with a simple drag and drop. A line can also be moved to the top from the RAL Properties Action Button. Sort order is respected for the Agreement PDF, invoice, billing events, mobile, and web.

Recurring Billing Mode Final Invoice Tendering at Close – Typically for all billing mode types that are recurring, the final invoice happens through proposed billing. With this setting turned on, final invoice and payment tendering occurs at time of rental agreement close by the counter employee. Please contact integraSoft to turn this feature on.

Rental Agreement Activities Tab – integraRental users can now record date/time/username stamped activities/notes for a rental agreement. This feature provides a layer of accountability and audit to happenings/notes for an agreement. Users can also select which activities they want to force acknowledge every time someone views the agreement.

Customer & Agreement Notes Acknowledgement											
Customer Note: Please call jane on her cell at 563-555-1240 if there are ever any questions regarding rentals. They have financing through city national bank. Referral from Sky Rentals - Jamie Hall		Rental Agreement Note: This is the first time they have rental a 19 foot scissor. They have always requested a 26 foot before. We have confirmed 19 is what they want for this rental.									
Activities: <table border="1"> <thead> <tr> <th>Log Number</th> <th>User</th> <th>Date Time</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>4310</td> <td>mike</td> <td>3/26/2024 11:00 AM</td> <td>Called and left a message on the answering machine</td> </tr> </tbody> </table>				Log Number	User	Date Time	Notes	4310	mike	3/26/2024 11:00 AM	Called and left a message on the answering machine
Log Number	User	Date Time	Notes								
4310	mike	3/26/2024 11:00 AM	Called and left a message on the answering machine								
			<input type="button" value="Acknowledge"/>								

Improved Visibility to Items Being Dispatched – A new tab has been added to Dispatch Activity Detail showing the “Items” being dispatched. View “Dispatch Items” button has been added to the action drop down for most dispatch related grids to quickly see this information.

Make it Easier to See RA & RA Lines – Everywhere we allow an “Action” to view a Rental Agreement we are now offering 3 options. RA (Full), RA (Pop-Up) and RA Lines Only (Pop-Up). This gives integraRental users quick access to helpful information without leaving the screen they are on.

The screenshot shows a grid of rental agreements with columns for Customer, Ship To Name, Status, Created By, Rental #, Location, Type, Start Date, End Date, Prepay Date, PrePay, Amount, Signature Requested, and Action. A red circle highlights the 'Action' dropdown menu for a specific row, which includes options: RA (Full), RA (Pop-Up), and RA Lines only (Pop-Up). Below the grid is a detailed view of a rental item with columns: Trans, Item#, Description, Qty, Home Location, Current Location, Est Poss Start, Poss Start, Start Date, Est Call Off, Call Off, Est Poss End, Poss End, and Est Pr.

Trans	Item#	Description	Qty	Home Location	Current Location	Est Poss Start	Poss Start	Start Date	Est Call Off	Call Off	Est Poss End	Poss End	Est Pr
Rental	SETH2490-28	26 Foot Scissor Lift	1	Bettendorf	Bettendorf			3/20/2024 8:14 PM	3/22/2024 8:14 PM				\$3,400
Service		DAMAGE WAIVER	1										\$34
Service		Delivery	1										\$17

RAL Properties for Product – On the RAL Properties tab for product lines we now show the available quantities for both the company and locations.

RAL Properties Billed To Date – On the RAL properties menu, integraRental users can now view, by rental line, the billed through amount and remaining to be billed amounts.

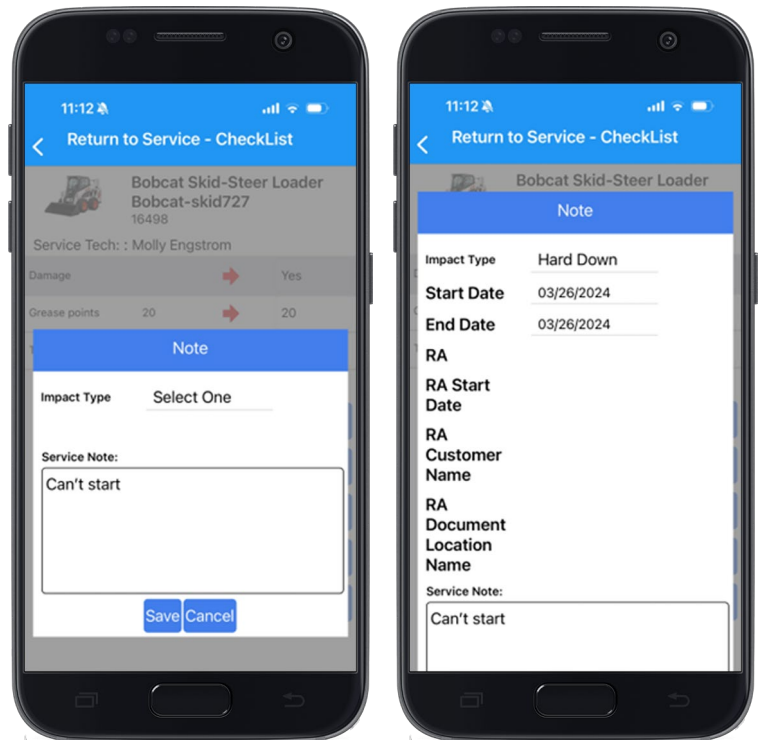
The screenshot shows the 'RAL Properties' dialog box with tabs for General, Rates, Metered Hours, and Add-On. The 'General' tab is active, showing fields for Line Note, Home Location, Current Location, PO Number, No Latitude/Longitude, Rent to Own, and Line Sort Position. On the right, there are six UDDField boxes. A blue callout box highlights the 'Billed To Date: \$7,681.60' and 'Remaining To Bill: \$25,856.00' information, which is also displayed in a box at the bottom of the dialog.

Service Ticket Changes – The ability to add service tickets has been added to a few places for convenience. A menu option has been added to generate internal service tickets under Service Repair. Create internal transfer tickets under Dispatch. Upon completion of a Warehouse Transfer service ticket that is associated with a Parts Request, parts will be automatically added to the service ticket.

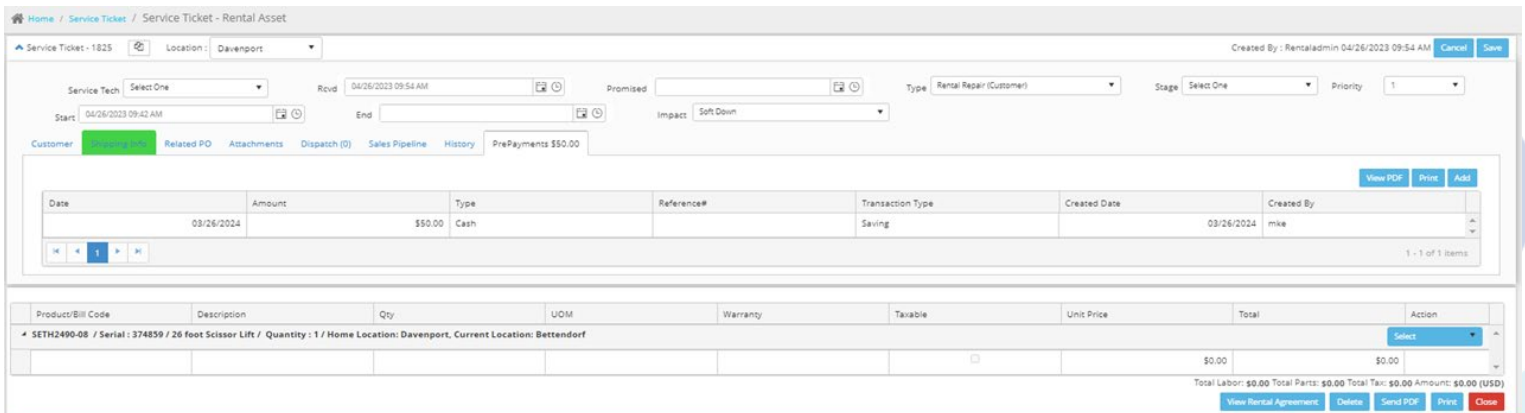
Service Ticket Hard Down Metrics – In service ticket search, integraRental users now see Total Assets Hard Down and Average Length of Downtime.

New Service Ticket Search Information – Additional Columns have been added to the ST Search grid to show ticket down time impacts stats.

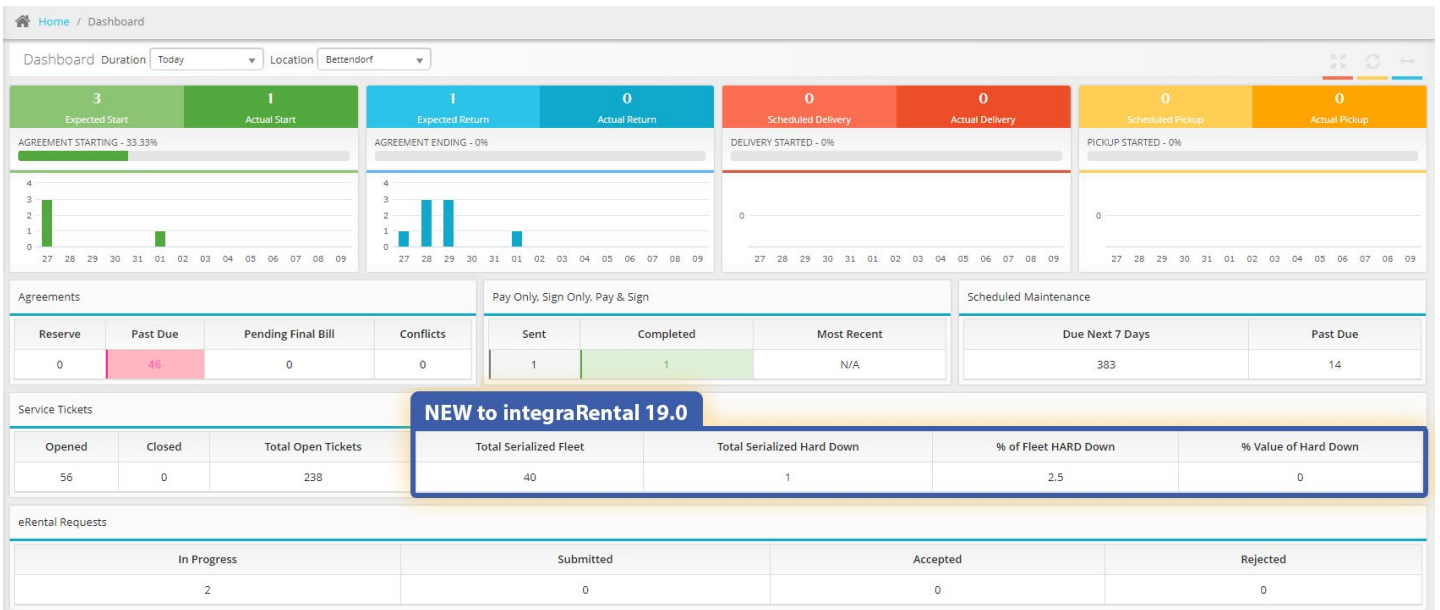
Return to Service in Mobile “Hard Down” – As part of the Return to Service checklist, Mobile users can now set the impact type of an “Attention Required” ticket.



Add Pre-Payments to Service Tickets – The Pre-Payments tab has been added to Service Tickets. On payment tendering of a Service Ticket, the prepayment is consumed, and the difference is billed.



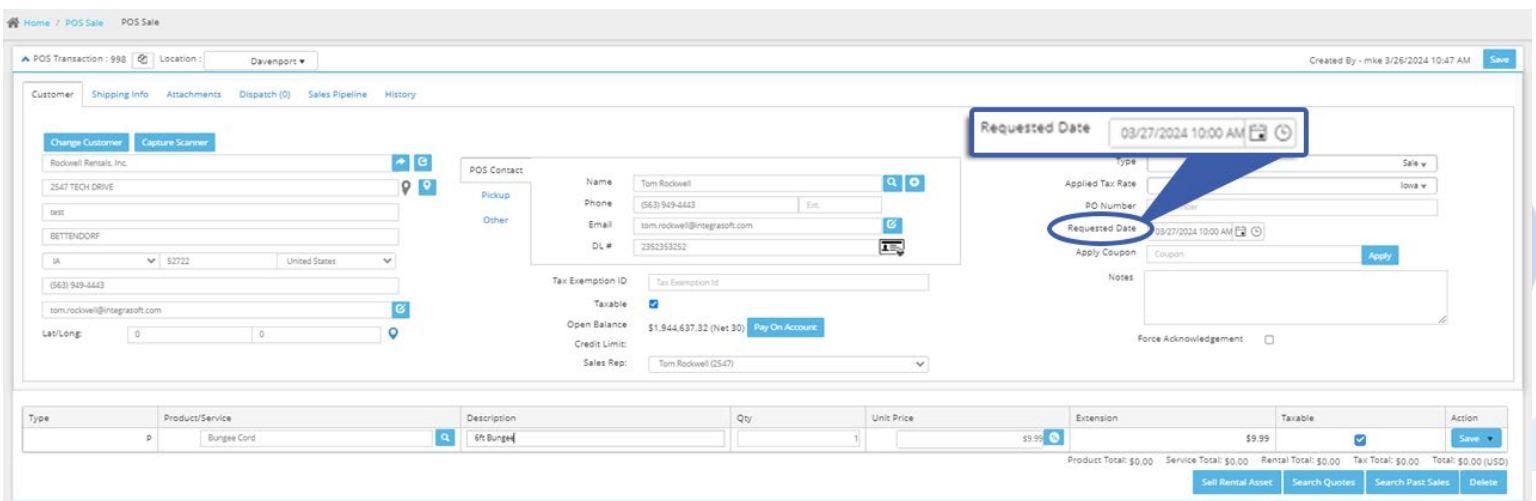
Home Screen Dashboard Enhancements for Service Tickets – Service Ticket Panel on the dashboard now shows additional metrics. Total Serialized Fleet, Total Serialized Hard Down, Percent of Fleet Hard Down and Equipment Value of Hard Down.



Unique Driver's License Per Customer – With this new feature, integraRental users can now prevent duplicate customer records from being created by only allowing a driver's license number to be assigned to one customer record. Please contact integraSoft to turn this setting on.

Scanned Driver's License Name Settings – Users can now choose the format of the customer's name when received from a Driver's License scan. Possible settings are First/Middle/Last, Last/First/Middle, Last/First, and First/Last. Requires integraRental's driver's license scanning feature.

Take Point of Sale "Reservations" – For users who want to create a POS Sale to be picked up by a customer at a future date, use the new date field on the POS Header named Requested Date. The new "Going Out" view respects the requested date for customer POS sale pickups.



eRental Single Page Check Out – With the new eRental checkout experience, users checkout using a single page, which enables an even friendlier experience on mobile devices.

The screenshot displays a single-page checkout interface. At the top, there is a navigation bar with 'Home / Call / Checkout' and a 'Checkout' title. A 'BACK TO RENTAL' link is visible in the top right corner.

The main form is divided into several sections:

- Contact Information:** Includes fields for Billing Name, Contact Name, Phone, Email, and Fax.
- BILL TO ADDRESS:** Includes fields for Address (Line 1 & 2), City, State/Province, Country (US), and Zip/Postal Code.
- Delivery Information:** Includes fields for Address (Line 1 & 2), City, State, Country (US), Zip, and a Delivery Notes field.
- Additional Info (Optional):** Includes a PO Number field, a Damage Waiver section with 'Accept' and 'Decline' radio buttons, and a Coupon field with an 'Apply' button.
- Order Signature:** Features a 'RENTAL AGREEMENT' section with a scrollable text area and an 'Accept TAC' button.
- Request Summary:** A 'Review Request' section containing a table of items.

Order Summary Table:

PRODUCT	DETAILS	UNIT PRICE	QTY	TOTAL	AVAILABLE
	Taxless Bike Rental 04/18/2024 06:00 PM - 04/29/2024 12:00 AM	\$260.00	1	\$260.00	

Below the table, there is a checkbox for 'SHIPPING & HANDLING' and a 'Place Request' button.

Order Totals Summary:

Total Cart Items	1
Rental Items Total	\$260.00
Cart Total	\$260.00
Flexible Cancellation	\$1.00
Damage Waiver	\$13.00
Taxes (7.00%)	\$23.46
Total	\$300.46

A 'Testing Checkout Form' label is located below the totals summary.

eRental Guest Checkout Email on File – With this setting turned on, eRental customers who are checking out and already have an email address on file, are now forced to sign-in to their account prior to submitting any requests.

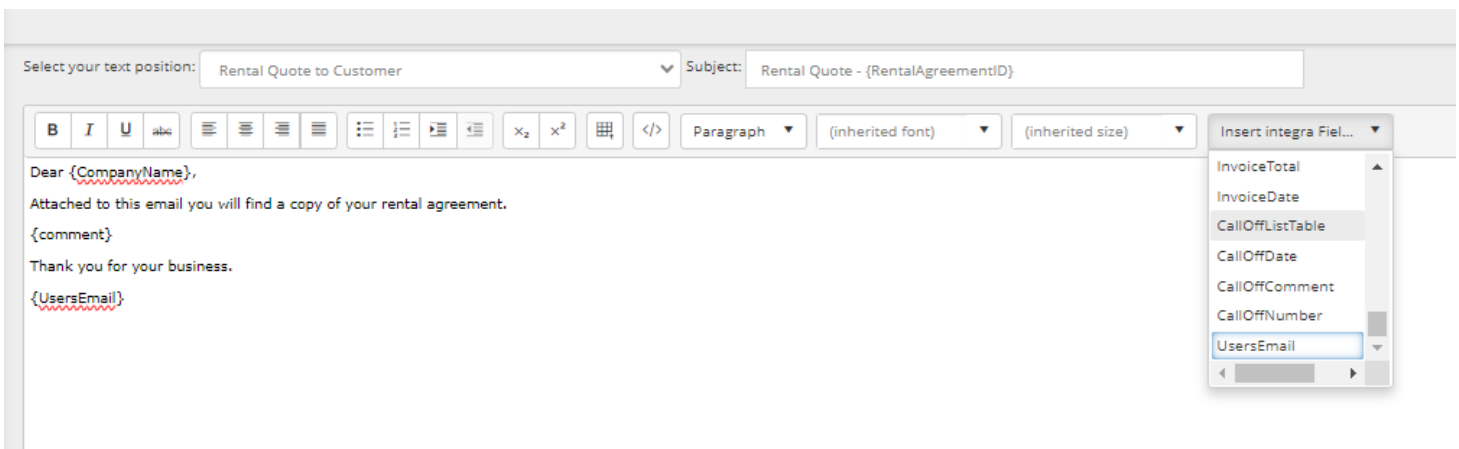
Enhanced Customer Search Features – Searching customer records has never been easier. integraRental users can now search by Drivers License Number, Customer Phone Number, and Address.

Recapture Signature (Pay & Sign and Mobile) – A new recapture button is available for when a signature has already been captured for a rental agreement. This allows the user to send a link to replace the signature on the rental agreement. This is offered in both Web and Mobile.

Pay & Sign Via Text Message – integraSoft has taken the popular Pay & Sign via Email feature and has now made it available through text messaging!

CC User on All Emails – Any email sent from the system to the customer can now automatically CC the integraRental user sending the email. Contact integraSoft to turn this setting on.

Insert User Email Addresses into PDF Templates – Through the email template setup, users can now insert a user’s email in the “Insert integraField” template editor. This enables users to embed their email address into emailed PDFs when sending to customers.



Access the Related Dispatch Activity from 28-Day Availability Pop-Up – From the 28-Day view users can now click on blue dispatch squares and access the dispatch activity that is responsible for the blue square.

Make any Red Font, Bold & Red – Red font now shows as bold and red to further highlight potential issues.

New System Settings WorkFlow Tab – A new tab has been added to the system settings called WorkFlow. This tab includes new settings that can change how new customers are created, hide the payment button in certain billing modes, and can ignore the metered hour billing feature by default.

Allow Decimals in Scheduled Maintenance Rented Days Interval - Decimals are now allowed for scheduled maintenance intervals.

New Attribute Calculation Method “Check in as Qty” – New Rental Asset Attribute calculation method “Check In as Qty”. This enables integraRental users to enter gas amount filled on check-in and to bill for amount filled.

@Today List Views – Users can now enter @today into the date fields for saved views/grids to always populate that day’s information. Example Start Date is @today and end date would be @today+7. This would show the next week of information every time that saved view is accessed.

Display Fuel Capacity Separately – Default column stores the “capacity” of the tank and the Calc Method of Check-in as Qty uses the Check in Qty as the amount of fuel used to “refill” and charge the customer for.

Dispatch Unavailability Default Options – For dispatch activity types that have “remove from availability” check mark options (Transfer, Replace). This new setting allows for “remove from availability” to always start out checked. Please contact integraSoft to turn this setting on.

Customer Site Transfer Enhancements – Upon completion of dispatch type “customer transfer”, the ShipTo Address for each item transferred is updated with the new address on the Rental Agreement Line. This new address will be the suggested pickup address for dispatch type Pickup. This does NOT change the original ShipTo tab address for the agreement.

Related Asset Relationship Types – Rental items can now have a circular relationship with related items. Example: A table can relate to a chair, a chair can relate to a tablecloth, and a tablecloth can relate to a table. This enables flexibility previously not possible with our Parent/Child related item structure.

Offer with Delivery/Pickup – Similar to our related item concept for rental assets, this feature allows integraRental users to flash a pop-up with services they typically sell alongside delivery/pickup charges.

The screenshot shows the 'Service Items' management interface. At the top, there is a search bar and an 'Add' button. Below is a table with the following columns: Short Description, Status, BillCode, \$ Amount, When To Bill, Taxable, Service Labor, Dispatch Type, Sec. Currency, \$ Sec. Currency Amount, Offer With Delivery/Pickup, and Action.

Short Description	Status	BillCode	\$ Amount	When To Bill	Taxable	Service Labor	Dispatch Type	Sec. Currency	\$ Sec. Currency Amount	Offer With Delivery/Pickup	Action
DELIVERY	Active	RENTAL	\$150.00	First	<input type="checkbox"/>	<input type="checkbox"/>			\$0.00	<input type="checkbox"/>	Edit
DELIVERY - SETUP	Active	RENTAL	\$75.00	First	<input type="checkbox"/>	<input type="checkbox"/>			\$0.00	<input type="checkbox"/>	Edit
DELIVERY - REMOVE PACKING	Active	RENTAL	\$10.00	First	<input type="checkbox"/>	<input type="checkbox"/>			\$0.00	<input checked="" type="checkbox"/>	Edit
DELIVERY - TRAINING	Active	RENTAL	\$50.00	First	<input type="checkbox"/>	<input type="checkbox"/>			\$0.00	<input checked="" type="checkbox"/>	Edit

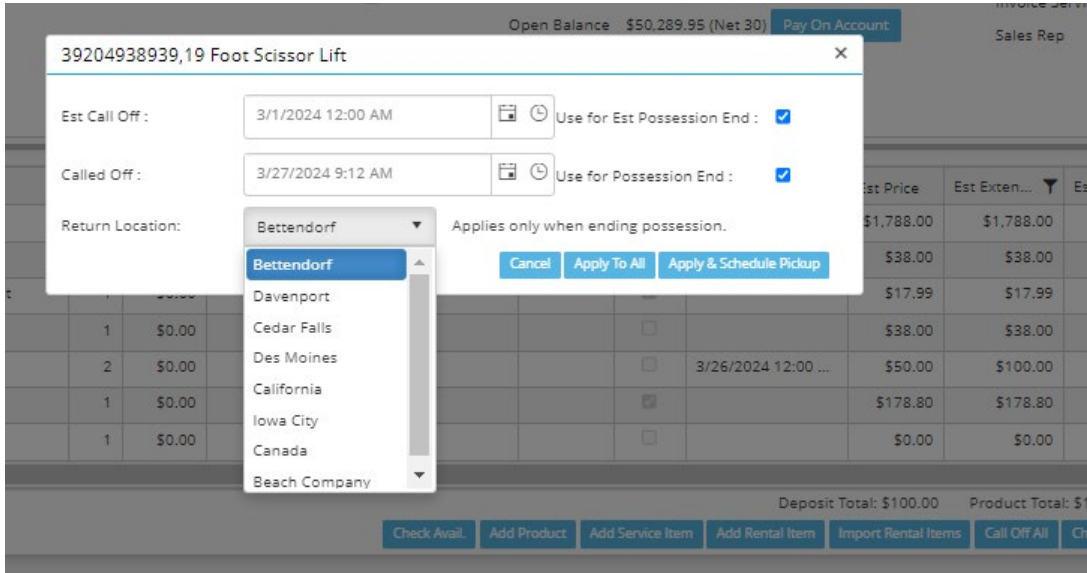
Below the table is a pop-up window titled 'Offer With Delivery/Pickup'. It contains a table with the following columns: Service Name, Cost, Quantity, and Add to RA.

Service Name	Cost	Quantity	Add to RA
DELIVERY - REMOVE PACKING	10	1	<input type="checkbox"/>
DELIVERY - SETUP	75	1	<input type="checkbox"/>
DELIVERY - TRAINING	50	1	<input type="checkbox"/>

At the bottom of the pop-up window are two buttons: 'Cancel' and 'Add with Delivery or Pickup'.

Multi-Location Rental Features

Complete Multi-Location Rental Freedom – With enabled permissions, integraRental users can create reservations for their assigned store or for another store. Users can also return rental equipment to any store and the current location updates to the returning store. This enables any employee in the business to transact and serve customers no matter what store they work at.

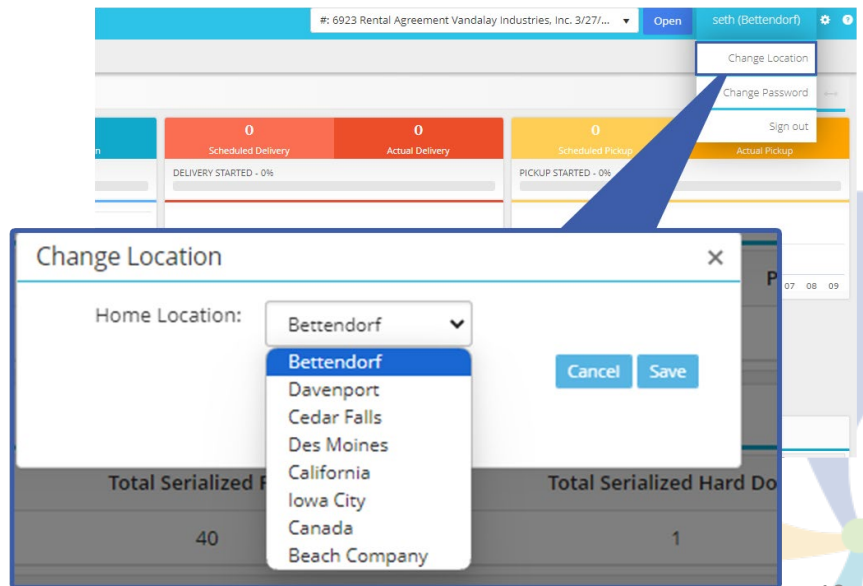


Dispatch To/From Different Location then Documents Location – On dispatch activities, integraRental users can now task another location with performing a dispatch activity on their behalf. We have added current location, and dispatching location to all current dispatch grids so users can better manage tasks.

Multi-Location Dispatching – For dispatch activity type Replace, Pickup, and Internal Transfer, integraRental users can now handle a three-prong dispatch activity. Example: Store A (Assigned DA Location) needs to go to the customer jobsite (ShipTo) pick up the item, and return it to store B. Completing the dispatch to Store B updates the asset current location to Store B.

Display and Change User Location

A new user permission allows a user to change their Home Location. This is useful for users that may work or transact at multiple different stores. We are now displaying the users assigned location next to their username in the top right of the screen. Changing your assigned location can be done by clicking on username and picking a new location.



New View! Not Home/Not Next (Ser) – This view has two main objectives to help your team ensure equipment is in the right location when it’s supposed to be. The first reason something shows on this grid is its not home, this means its home location does not match its current location. The second reason is not next, and that means it is currently promised to rent out of the store you are viewing, and its current location doesn’t match that store. This grid will make our multi-location customers more agile, and able to do more with less.

Home / Dispatch / Not Home Not Next (Ser)

Search for Asset Item... Location: Bettendorf Next Rental Agreement Starting On or Before: 4/14/2024 Search Export

Asset Name	Asset Item No	Qty	Current Location	Home Location	Start Date	Next Rental#	Next Rental Location	Next RA Customer	Intercompany Transfer Date	Action
Excavator	Caterpillar 650-1	1	Davenport	Bettendorf						Action
26 Foot Scissor Lift	SETH2490-61	1	Davenport	Bettendorf					4/7/2024	Action
skid steer	HND-891-003	1	Davenport	Bettendorf					4/7/2024	Action
skid steer	HND-891-004	1	Davenport	Bettendorf						Action
skid steer	HND-891-005	1	Davenport	Bettendorf	4/7/2024	18414	Bettendorf	John Elders		Action
skid steer	HND-891-006	1	Davenport	Bettendorf	4/7/2024	1882	Bettendorf	Mark Woomb		Action
skid steer	HND-891-007	1	Davenport	Bettendorf	4/7/2024	20451	Bettendorf	David Smith		Action
skid steer	HND-891-008	1	Davenport	Bettendorf	4/11/2024	89012	Bettendorf	Amanda Andrews		Action
skid steer	HND-891-009	1	Davenport	Bettendorf	4/13/2024	3347	Bettendorf	Nick Offerman		Action

New View! Not Home/Not Next (Nser) – This grid shares the same objective the serialized view does but works for non-serialized assets. As soon as a rental store goes below or above its “Assigned Quantity” we show the shortage or surplus of inventory that needs to leave/come to that store. We also show upcoming rental need and if you have enough inventory to service upcoming reservations.

ERP-Only Features

eRental Terms Choice (On Account) – Depending on the customers terms, signed in eRental customers are able to use payment type “On Account” when creating eRental requests. This is only necessary when an eRental site is enabled to require CC from non-term customers.

More Easily Create Warehouse Transfers – From the product look up screen, integraRental users can initiate a warehouse transfer of that product to or from their store to another location.

Search Product / Service

Filter search

Type	Product	Description	Price	Comp Net Available	Comp Qty on Order	Comp Reorder Qty	Loc Net Available	Loc Qty on Order	Loc Reorder Qty	Bin Location	Action
Product	104274	HEPA PROTEA	\$339.99	-1.00	1.00	0.00	-9.00	0.00	0.00	All Locations	All Locations
Product	070700023GT	OIL FILTER CARTRIDGE GENIE	\$165.67	-1.00	0.00	0.00	-5.00	0.00	0.00	All Locations	All Locations
Product	070700023	FILTER OIL CARTRIDGE GENIE	\$0.00	-2.00	0.00	0.00	-2.00	0.00	0.00	All Locations	All Locations
Product	100054	FILTER HE TURBO V								All Locations	All Locations
Product	100754	PREFILTER BCKHOE								All Locations	All Locations
Product	100758	FILTER A								All Locations	All Locations
Product	11411404400	AIR FILTER								All Locations	All Locations
Product	0745010063GT	FILTER GE								All Locations	All Locations
Product	0746040073	FILTER H GENIE								All Locations	All Locations
Product	100131	FILTER AF								All Locations	All Locations
Product	100446	FILTER PR GX100/BS								All Locations	All Locations
Product	102119	FILTER AF								All Locations	All Locations
Product	107549	AIR FILTER								All Locations	All Locations

Inventory by Location

Product: 100131

Location	Available	On Order	Action
Midtown		3.00	Create Transfer
Avenue		2.00	Create Transfer
Main Street		2.00	Create Transfer
Longwell		2.00	Create Transfer
Tremont		1.00	Create Transfer
Fairgrounds		1.00	Create Transfer
Tempe		0.00	
Sunset		0.00	
Oak		0.00	

1 - 10 of 10 items

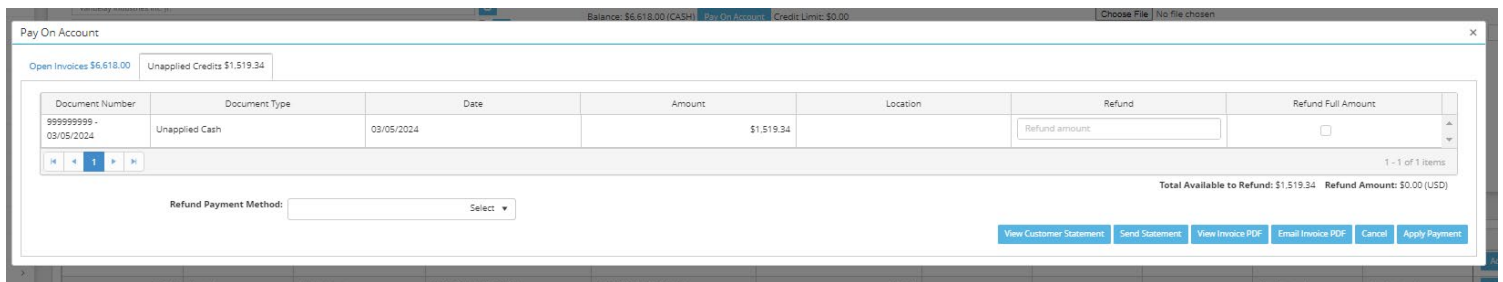
Done

Product Transfers View (InProgress showing DA's) – This view is aimed at showing all product transfers, and the associated transaction that product is being transferred for if one exists.

Close Parts request from ERP – We've added the ability to close a parts request from ERP without the need of a Warehouse Transfer. This is used for items that don't need to be transferred or are direct shipped and need to be added to a service ticket.

Pay On Account - Apply or Refund Unapplied Credits – Through the Pay on Account button we now have the ability to see and apply customer credits to open invoices. We have 2 tabs Open Invoices and Unapplied Credits. If a credit needs to be returned to the customer, integraRental users can initiate a refund from this screen.

Payment Tendering – Use Unapplied Credit as Form of Payment – If a customer has a credit balance, we now allow the user to use the credit against the new invoice using a new payment tender type of Unapplied Credit.



New Service for "Merge Customer" – In the event of customer duplication, integraERP users can now merge two customer records to create one. In doing this, integraRental combines all of the rental/customer information together.

Reserving POS Sale Inventory – POS now works like RA and ST and reserves the product when added to the POS.

On Hold Experience Improvements – If a customer is placed on hold or inactivated from integraERP, integraRental respects the hold/inactive and prevents further transactions. If a customer is placed on hold/inactive from integraRental this updates them to be as such in integraERP.

