

integraRental 20.0

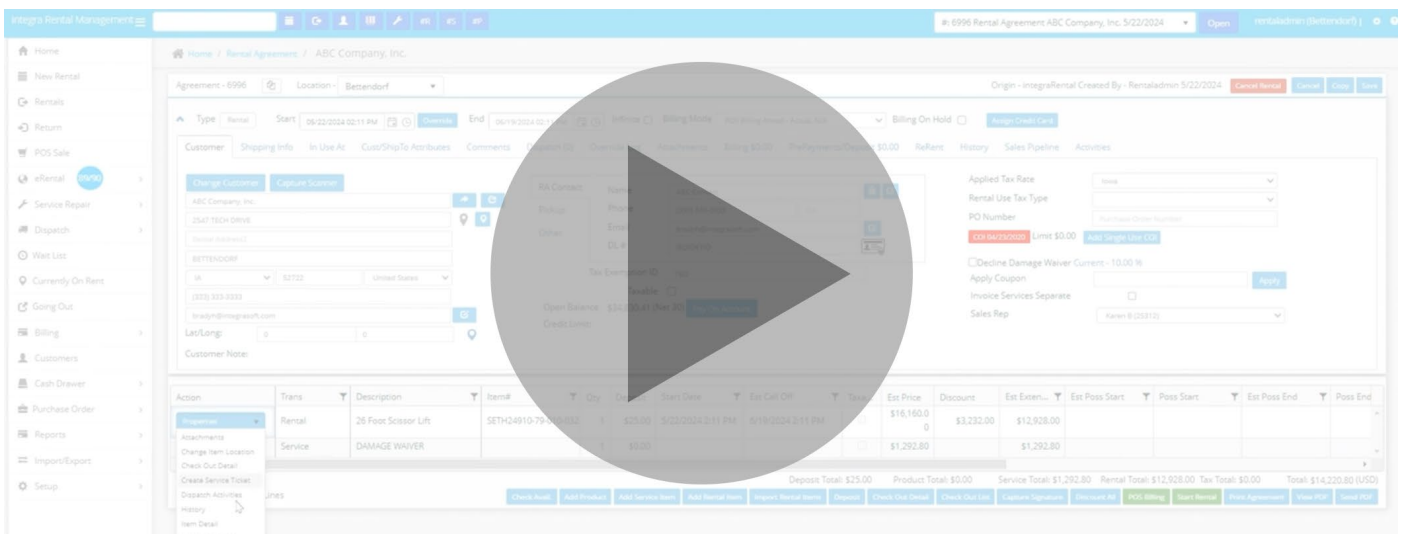
Discount Options, Text Automation, and More

Updates starting Tuesday, May 28, 2024

integraRental release 20.0 is feature-rich with enhancements to your day-to-day business operations. Within this release are major improvements to discounting, texting automation, product selling, and service. Get a firsthand look at some of the most significant 20.0 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 20.0

Price Discount – This release brings major improvements to the discounting capabilities of integraRental. Users can now provide discounts by line or apply them to the entire agreement after rental has started. In addition, users can now display on the rental agreement discount amounts by line, and a total at the bottom. Please see the below video for more information on this exciting new feature. Contact integraSoft support to turn this new feature on.

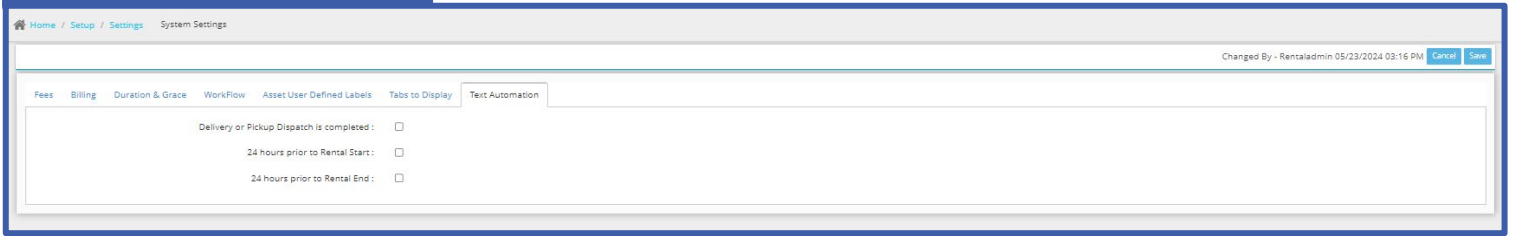


Overnight Rate – Better serve customers needs with a new overnight rate option. integraRental users can now define a weekday start time and a following morning end time that will only charge a customer for a half day of rent if started/called off in that time frame.

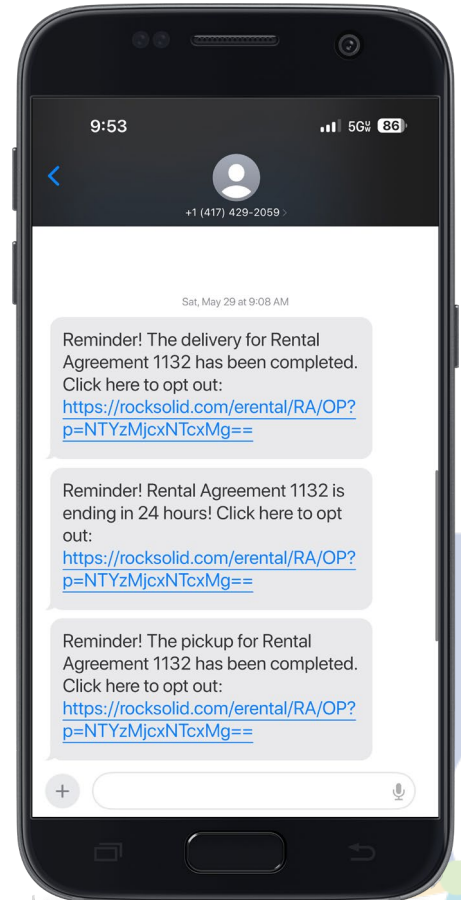
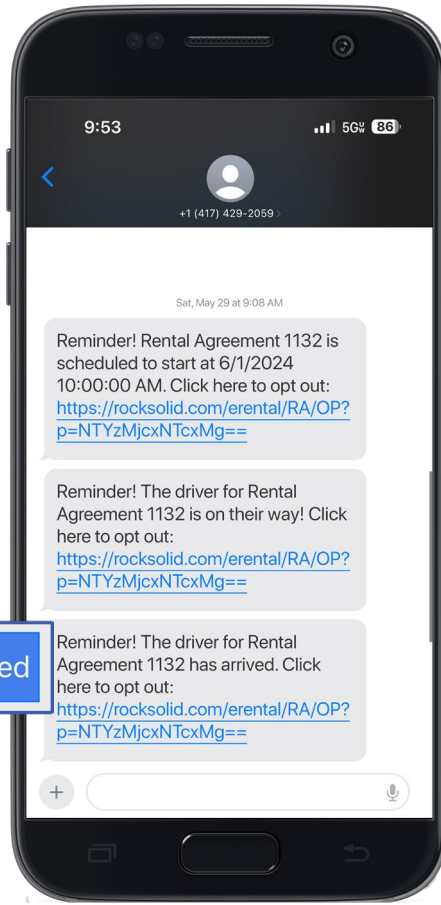
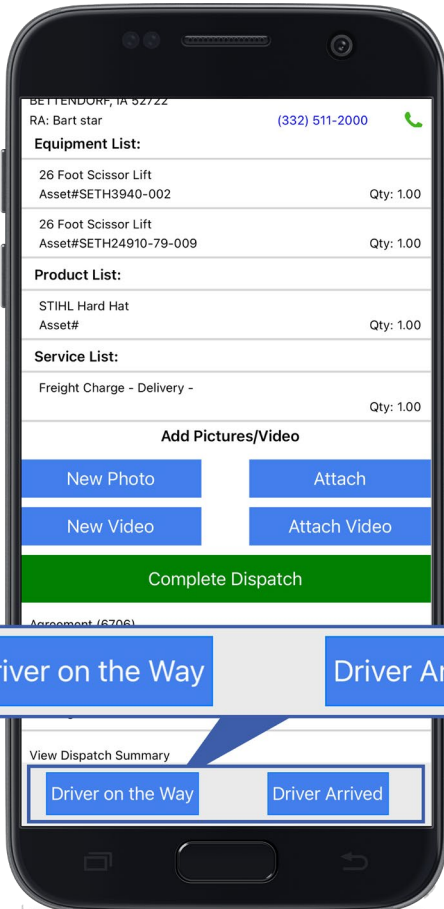
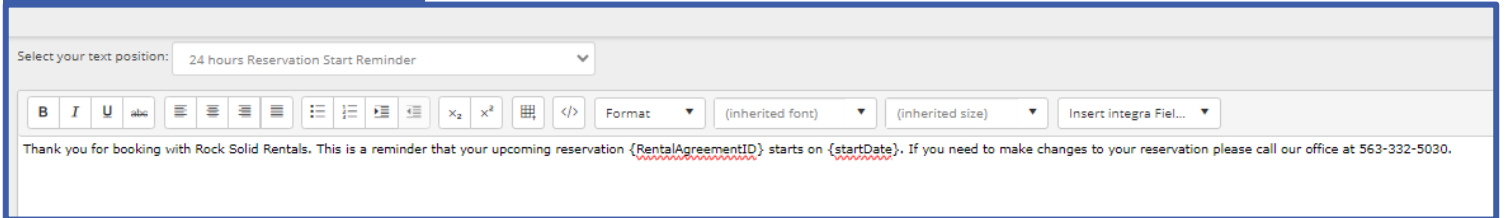
Deposit as Pre-Payment – Based on customer terms, and by rental asset master deposit settings a deposit can be calculated and billed in the first payment/invoice creating a prepayment as part of the process. This pre-payment is then consumed on final billing, or returned to the customer if nothing additional is owed. Contact integraRental support to utilize this new feature.

Texting Automation – integraRental release 20 brings five exciting new texting features with it. If enabled a customer can be reminded of an upcoming reservation 24 hours prior, reminded of rental end date 24 hours prior, and notification of delivery or pickup complete. In addition to these automated options, users of the integraRental mobile app users can now hit a button to notify the customer a driver is on the way and hit another button to notify the customer the driver has arrived. By default, texting automation is off. To turn it on, go into System Settings (pictured below).

Texting Automation Setup



Texting Reminder Setup



Billing On Hold – integraRental users can now place creation of billing events for a RA, ST, or POS on hold by checking the new on hold box pictured below. This does not impact pay on account for a customer, or taking pre-payments.

Rental Agreement

POS Transaction : Location : Bettendorf

Customer: Shipping Info: History

Change Customer Save as New Customer Capture Scanner

CASH CUSTOMER

3947 MOENCKS ROAD

Rental Address2

BETTENDORF

IA 52722 United States

(997) 521-7497

cashCustomer@rental.com

Lat/Long: 0 0

POS Contact

Name: Name

Phone: Phone No. Ext.

Email: Email Id

DL #: LIC #.

Tax Exemption ID: Tax Exemption Id

Taxable:

Sales Rep:

Type: Sale

Applied Tax Rate: Iowa

PO Number: PO Number

Requested Date: [Calendar]

Apply Coupon: Coupon Apply

Notes:

Force Acknowledgement:

Billing On Hold

POS Sale

Agreement - 6973 Location - Bettendorf

Type: Rental Start: 04/26/2024 08:28 AM End: 05/02/2024 02:46 PM Billing Mode: POS Billing Ahead - Actual, N/A

Billing On Hold Assign Credit Card

Service Ticket

Service Tech: Tom Rowell Rcvd: 06/20/2019 09:44 AM Promised: [Calendar]

Billing On Hold Type: Customer Stage: Select One Priority: 1

Batch Email Invoices – Better serve customers with the ability to batch email invoices by filtered date range. This is another feature aimed at removing the need to access the accounting system by a day-to-day user when helping a customer.

Home / Billing Batch Email Invoices

Invoice Created Start: 04/01/2024 End: 05/01/2024 Location: Idaho Street Search Customer Search Export

Select All UnselectAll

| Invoice Date | Invoice # | Customer Name | Customer # | Invoice Balance | Related Document Type | Document # | To Email Address | Include | Action |
|--------------|-----------|------------------------------|------------|-----------------|-----------------------|------------|-----------------------------------|--------------------------|--------|
| 04/08/2024 | 2232 | Vandelay Industries Inc. Jr. | 1012 | \$409.57 | Rental | 1743 | seth@seth.com | <input type="checkbox"/> | Action |
| 04/08/2024 | 2232 | Vandelay Industries Inc. Jr. | 1012 | \$409.57 | Rental | 1743 | seth@seth.com | <input type="checkbox"/> | Action |
| 04/11/2024 | 2284 | Vandelay Industries Inc. Jr. | 1012 | \$9.62 | POSSale | 1575 | seth@seth.com | <input type="checkbox"/> | Action |
| 04/27/2024 | 2556 | Vandelay Industries Inc. Jr. | 1012 | \$226.10 | Rental | 1889 | seth@seth.com | <input type="checkbox"/> | Action |
| 04/24/2024 | 2482 | Vandelay Industries Inc. Jr. | 1012 | \$300.00 | Rental | 1842 | seth@seth.com | <input type="checkbox"/> | Action |
| 04/09/2024 | 2249 | Vandelay Industries Inc. Jr. | 1012 | \$104.20 | Rental | 1757 | seth@seth.com | <input type="checkbox"/> | Action |
| 04/10/2024 | 2259 | Vandelay Industries Inc. Jr. | 1012 | \$13.90 | POSSale | 1568 | seth@seth.com | <input type="checkbox"/> | Action |
| 04/09/2024 | 2242 | Vandelay Industries Inc. Jr. | 1012 | \$109.57 | Rental | 1752 | seth@seth.com | <input type="checkbox"/> | Action |
| 04/28/2024 | 2566 | Steve Co. UL | 1125 | \$48.58 | Rental | 1899 | stephen.mendonssa@integrasoft.com | <input type="checkbox"/> | Action |
| 04/28/2024 | 2567 | Steve Co. UL | 1125 | \$34.68 | Rental | 1899 | stephen.mendonssa@integrasoft.com | <input type="checkbox"/> | Action |
| 04/30/2024 | 2588 | PRAIRIE DOUGLAS SAMUEL | 327 | \$1,035.90 | Rental | 1918 | tylerf@integrasoft.com | <input type="checkbox"/> | Action |

1 - 11 of 11 items

Cancel Print Email Email Single PDF

Quick Key Calculated Flat Rate – integraRental release 20 has brought the ability to use the duration quick key inside the flat rate box to come up with a quick price calculation. Example: 2D would add the rate for two days in the flat rate field.

The screenshot shows the 'RAL Properties' window with the 'Rates' tab selected. The interface includes a sidebar with 'Current Rates' and 'Est Rates' options. The main area features an 'Override Reason' field, an 'Override With' section with 'Location' and 'Price Level' dropdowns, and a 'Propose' button. Below this is a table with the following data:

| Rate Type | Rate Name | Retail Rate Amount | Percent Discount | Override Rate Amount | Override Grace Hours | Metered Hours | Override Metered Hours |
|-----------|-------------|--------------------|----------------------|----------------------|----------------------|---------------|------------------------|
| Full Day | Bike Helmet | \$200.00 | <input type="text"/> | | | | |
| Weekly | Bike Helmet | \$670.00 | <input type="text"/> | | | | |
| Monthly | Bike Helmet | \$1,895.00 | <input type="text"/> | | | | |
| Flat | FLAT | \$0.00 | <input type="text"/> | 40d | | 0 | |

At the bottom of the window, there is a checkbox for 'No credit if paid & returned early', a text label 'System Applied Rate Source - Default, Retail Rate (USD)', and three buttons: 'Remove Flat Rate', 'Cancel', and 'Save'.

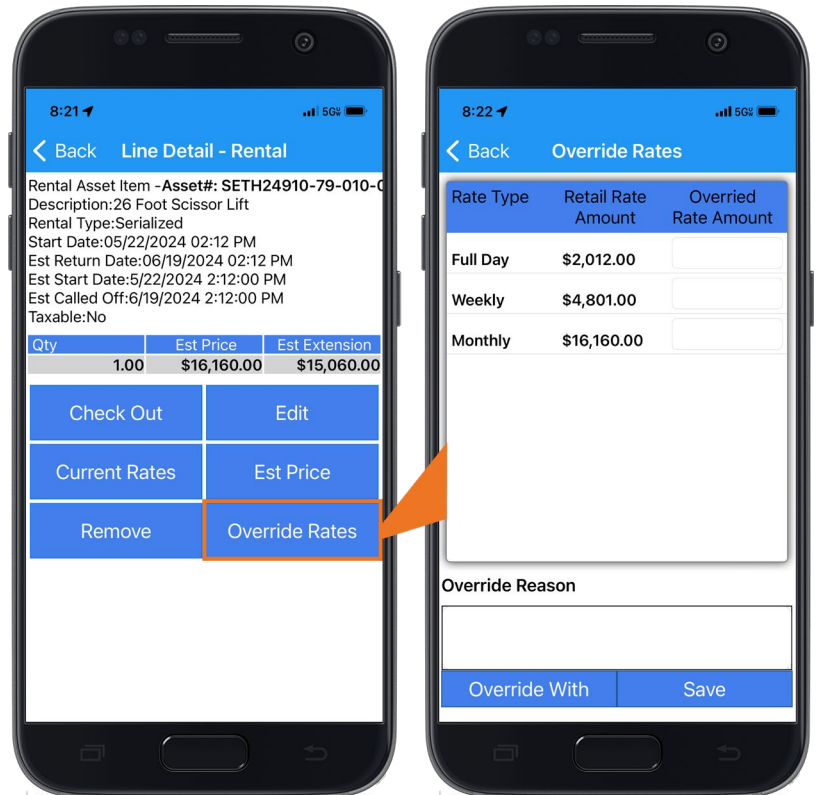
Customer Terms Code Rules & Management – A powerful new feature for integraRental customers serving a diverse customer base with different terms codes. Users can now assign permissions by terms code that prevent the “On Account” payment method from being offered. In addition, users can also manage deposit required rules by terms code. When setup, these features act as safeguard to protect against the most risk adverse customers.

Home / Setup / Settings Terms Setup

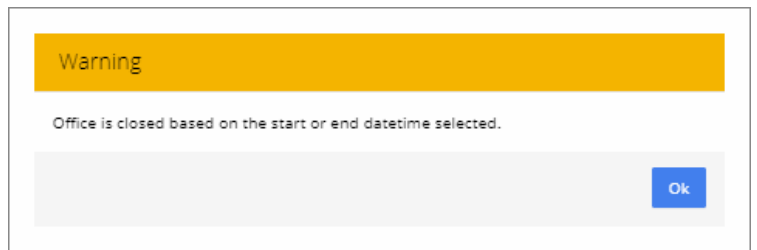
| Terms | Std Due Days | Deposit | Allow On Account |
|----------------|--------------|----------|------------------|
| 2% 10 Net 30 | 30 | Required | Not Offered |
| Due on receipt | 0 | Required | Not Offered |
| Net 15 | 15 | Optional | Allowed |
| Net 30 | 30 | Never | Allowed |
| Net 60 | 60 | Never | Allowed |

Cancel Save

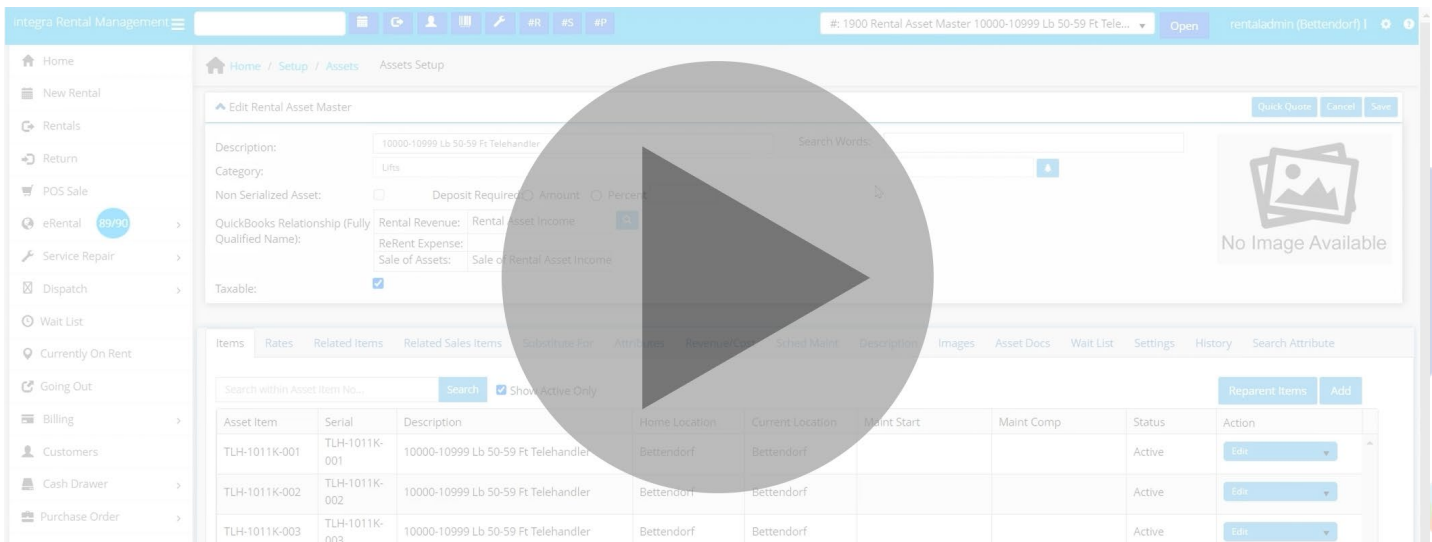
Mobile Rate Overrides – Rate overrides on the go! With integraRental Release 20 integraRental mobile users can now perform rate changes when creating quotes/reservations/rentals on the go. This is another major feature aimed at business mobility.



Don't Allow Rental Start/End During Closed Hours – With this setting turned on, integraRental users are prevented from choosing a time for start/end that is during closed hours.

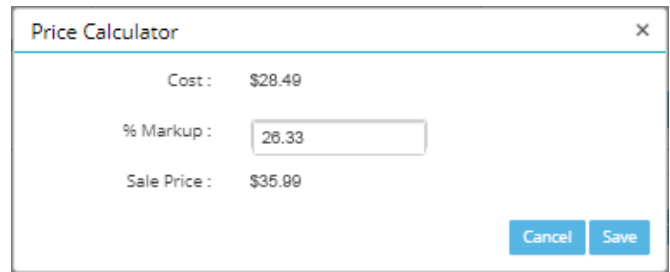


Asset Item Search Attributes – Find the perfect serialized asset for your customer faster than ever. integraRental release 20 has added the ability to create and assign "Search Attributes" to both RAM, and RAI. When setup, users can filter a list of serial numbers to only include assets that have the specific search attributes.

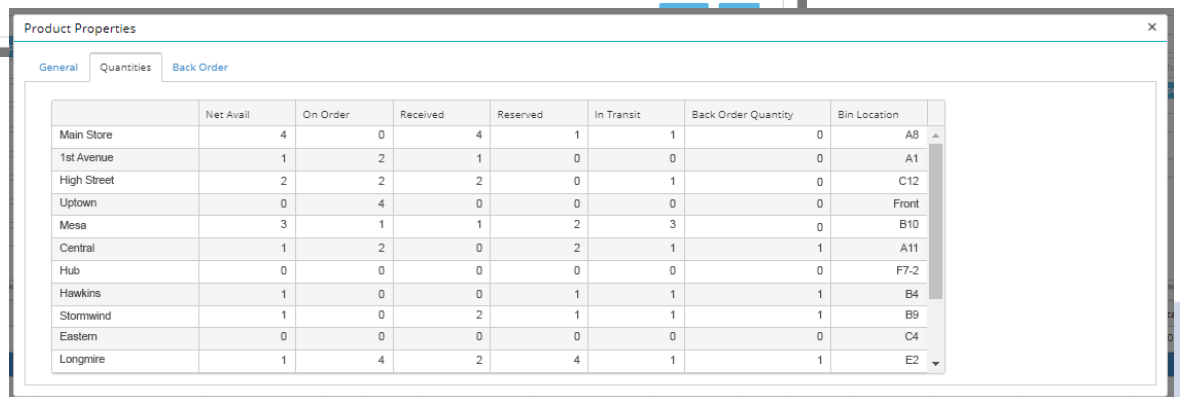
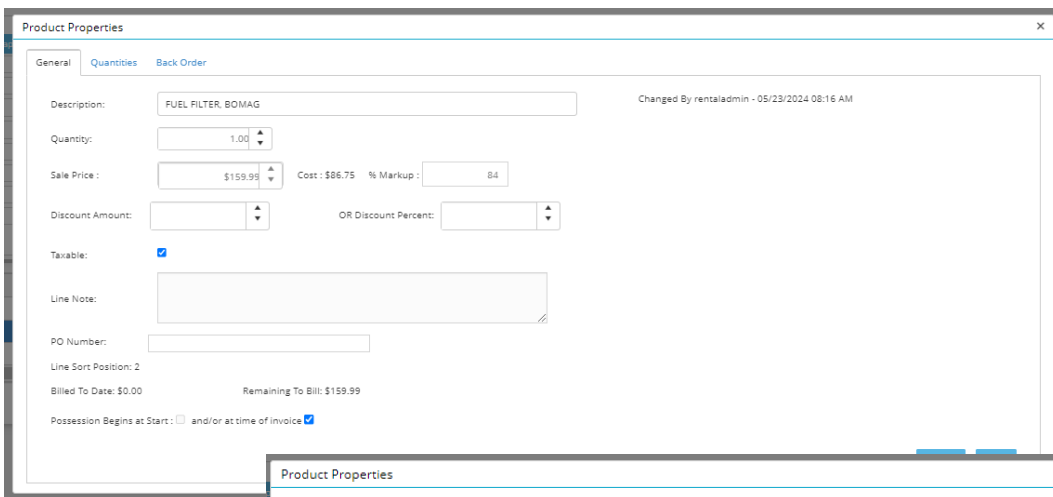


Rental/POS Product Line Enhancements – Release 20 has added to RAL and POS lines product cost, margin, and markup/margin percentage. This puts valuable information about sellable product right in front of the user without the need to click anywhere to view it.

New Product Price Calculator – integraRental users are now able to use a new product price calculator that allows for cost plus markup pricing choices. Please contact integraSoft support to turn this on.



Product Properties Enhancement – We have centralized product line editing/management with one new pop-up. Users can now edit description, quantity, price, discount, and markup/margin in one place. integraRental users can also view other location quantity on this pop-up as well. integraERP users are able to view bin locations, create warehouse transfers, and create back orders from this pop-up.



SKU Lookup in Rental Add Product – integraRental users can now enjoy the SKU lookup style product adding they know on POS Sale with Rental Agreements. If the number entered is an exact match users can hit enter and a product line is added. Traditionally this is done with a scanner at the counter.

Model Number in Document Descriptions – Display more information on Rental Agreement PDF's and Invoices about the item the customer has rented. If enabled the PDF will show Make, Model, Year, and Serial Number by line.

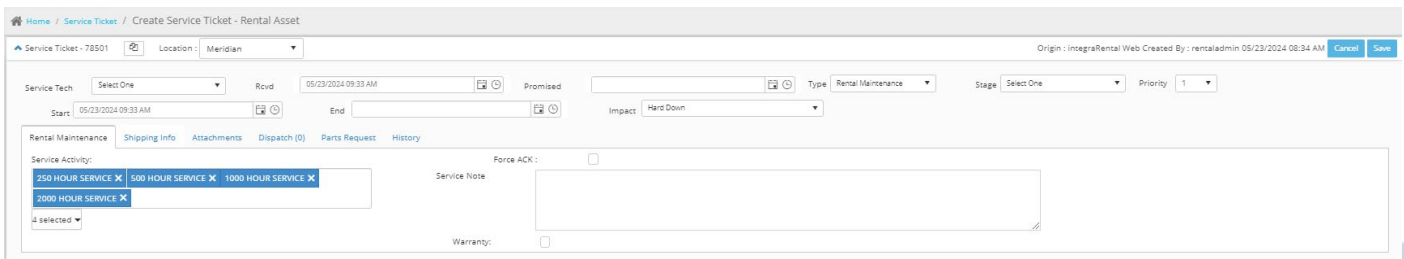
Rental Items

| Item No | Description | Quantity | Act/EST Call Off Date | Discount | Est Amount |
|---------|---|----------|-----------------------|----------|------------|
| E100892 | 40-44 Ft Telescopic Boom IC Serial#: 301284215 Model#: 400S Year: 2005 Make: JLG \$370.00/Daily; \$850.00/Weekly; \$1,820.00/Monthly; | 1.00 | Est Call Off TBD | | \$1,820.00 |

Service Ticket Efficiency Report – A major enhancement to service technician billable hour visibility this report allows a date range to be selected, along with a service technician and see all the billable hours turned in for that tech. Identify top or bottom performing technicians quickly with previously unavailable oversight.

| | A | B | C | D | E | F | G | H | I | J | K |
|----|-------------------|-----------------|--------------|-----------|---------------|-----------------|------------------------|-----------------|----------------------|----------------------|-----------------------|
| 1 | LineDescription | LineServiceTech | LineQtyHours | LinePrice | LineExtension | LineNote | AssetMasterDescription | AssetMasterType | AssetItemNo | AssetItemDescription | AssetItemSerialNumber |
| 2 | Repair Labor | Brady Hanna | 4 | 45 | 180 | Fixed gears | | NonSerialize | | | |
| 3 | On Return Service | BradyHanna | 1 | 0 | 0 | Fixed stuff | 26 Foot Scissor Lift | Serialize | SETH2490-37 | 26 Foot Scissor Lift | 984161 |
| 4 | On Return Service | BradyHanna | 1 | 0 | 0 | Inspection | 26 Foot Scissor Lift | Serialize | SETH24910-79-001 | 26 Foot Scissor Lift | 528543 |
| 5 | On Return Service | BradyHanna | 1 | 0 | 0 | Rotate Tires | 26 Foot Scissor Lift | Serialize | SETH2490-41 | 26 Foot Scissor Lift | 1231156 |
| 6 | Repair Labor | BradyHanna | 1 | 42.5 | 42.5 | Repair Labor | | NonSerialize | | | |
| 7 | Repair Labor | BradyHanna | 2.75 | 42.5 | 116.88 | Repair Labor | | NonSerialize | | | |
| 8 | Repair Labor | BradyHanna | 1 | 50 | 50 | Fixed wheel | Sport Bike 600CC | Serialize | SB-6CC-005 | Sport Bike 600CC | |
| 9 | Repair Labor | BradyHanna | 2.5 | 50 | 125 | Greased it | Sport Bike 600CC | Serialize | SB-6CC-005 | Sport Bike 600CC | |
| 10 | Repair Labor | BradyHanna | 3 | 42.5 | 127.5 | New plugs | | NonSerialize | | | |
| 11 | On Return Service | BradyHanna | 1 | 0 | 0 | New Fuel Filter | 26 Foot Scissor Lift | Serialize | SETH24910-79-010-050 | 26 Foot Scissor Lift | |
| 12 | On Return Service | BradyHanna | 1 | 0 | 0 | Changed Oil | 26 Foot Scissor Lift | Serialize | SETH2490-28 | 26 Foot Scissor Lift | 1020558 |
| 13 | Repair Labor | BradyHanna | 5 | 42.5 | 212.5 | Repair Labor | | NonSerialize | | | |
| 14 | On Return Service | BradyHanna | 1 | 0 | 0 | Checked in | 26 Foot Scissor Lift | Serialize | SETH24910-79-010-047 | 26 Foot Scissor Lift | |
| 15 | On Return Service | BradyHanna | 1 | 0 | 0 | Checked in | 26 Foot Scissor Lift | Serialize | SETH24910-79-010-051 | 26 Foot Scissor Lift | |

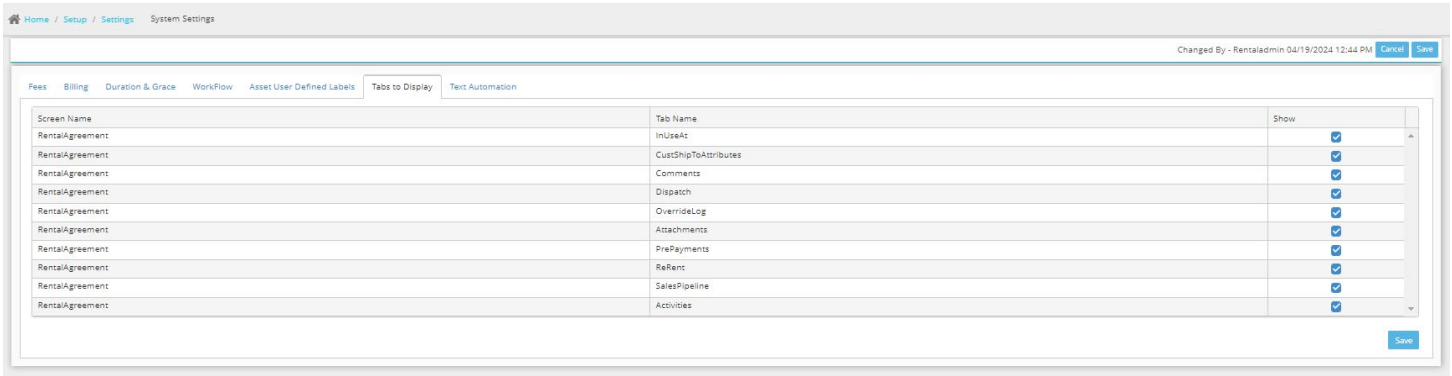
Complete Multiple Scheduled Maintenance Activities At Once – Clear like scheduled maintenance activities with one service ticket. This feature allows for the interval to be reset on whatever other service intervals have been covered. Example: 1000-hour service includes the tasks that 50, 250, and 500 would have covered. Instead of having to create and close four tickets, the user can now clear and re-set all of those with one ticket. This feature also enables a service scenario common in the lift industry of service interval of “6 months or 250 metered hours whichever happens first”.



Service Ticket Fee Based on Parts – This feature enables collection of a percentage-based service fee to be added to service tickets. Commonly applied for “Shop Supplies” this fee will only apply when a part gets added to the ticket. Please contact integraSoft support to turn this feature on.

Service Ticket Source – This release adds a service ticket origin of either integraRental Web or integraRental Mobile. This has also become a filterable column on service ticket search so users can easily identify tickets coming from mobile check ins.

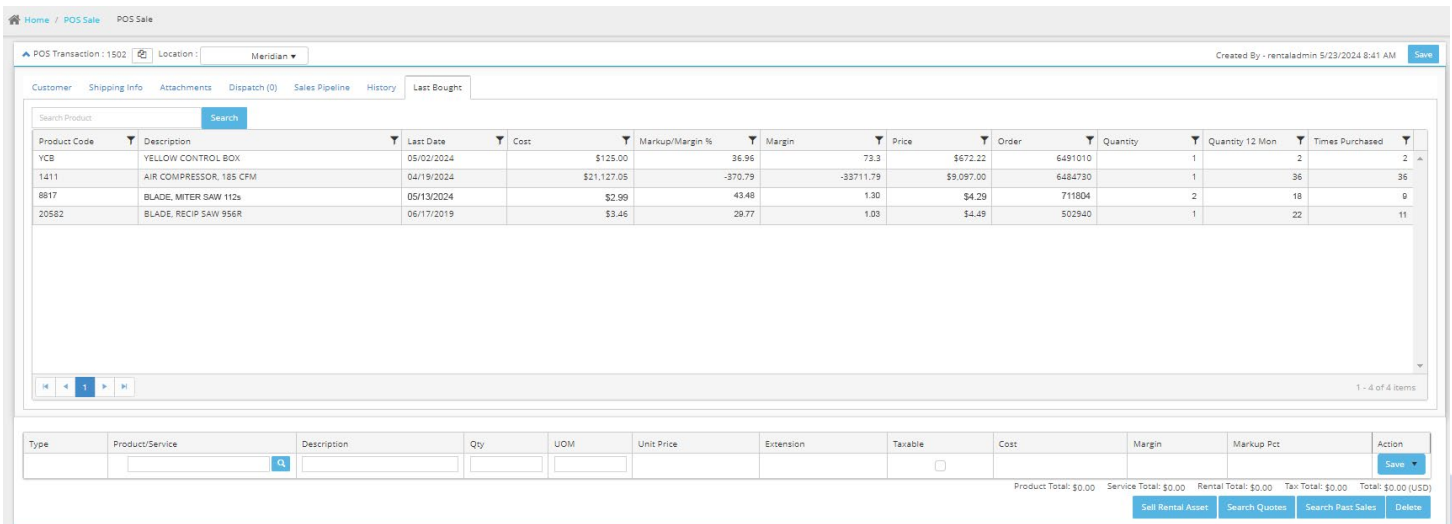
Tabs to Display – New System Settings – integraRental has grown to offer many different tabs on the rental agreement, not all of them may be applicable to your business. Users can now in the system settings turn off/on rental agreement tabs.



Sales Reps Name in Lists – Sales reps have been added to filterable grids providing salesmen unique views of only the transactions they are listed as the assigned sales rep on.

ERP-Only Features

Customer and Product Last Bought – Search last bought information to see the price, cost, and percent markup/margin for the last time the customer bought that product. Users are also able to see number of times purchased in the last year, and which transaction number it was purchased on.



Product Bin Location Visibility – Bin locations are now visible to the user in product search, and the new product properties pop-up when searching/selling product inventory. Display up to four bin locations for a product and have these print on dispatch PDF document for picking.

Back Orders – When stock is unavailable, integraRental users can now create and manage back orders from integraRental into integraERP for purchase. Better serve customer needs with this valuable inventory management tool.

The screenshot shows the 'Related Back Orders' section of a rental agreement. The agreement is for 'BRADY HALL' and was created on 05/23/2024. The back order table contains the following data:

| Description | Item# | Back Order Quantity | ERP Order Number | ERP Release Number | Created Date/Time | Action |
|--------------------|----------|---------------------|------------------|--------------------|---------------------|--------|
| FUEL FILTER, BOMAG | 05883045 | 8 | 649214 | 18302 | 05/23/2024 08:20 AM | View |

The 'Product Properties' dialog box shows the 'Back Order' tab. The fields are as follows:

- Back Order Quantity: 8
- UOM: EACH
- Order#: 649214-0
- Line#: (empty)
- Order Status: PICKED
- Created Date: 05/23/2024 08:20 AM
- Qty On Hand, Received, Intransit: (empty)

Buttons: View Back Order, Cancel Back Order, Cancel, Save

