

integraRental 21.0

More Info, More Options, More Convenience!

Updates starting Tuesday, September 4, 2024

integraRental release 21.0 brings multiple improvements to the information that is provided to users in several key areas of the software, adds new default and on-the-fly options to make pricing and payment activities more efficient, and elevates the in-yard mobile app user's ability to provide quality feedback at both the beginning and the end of rentals. We're excited for you to experience this new release and we welcome any feedback.

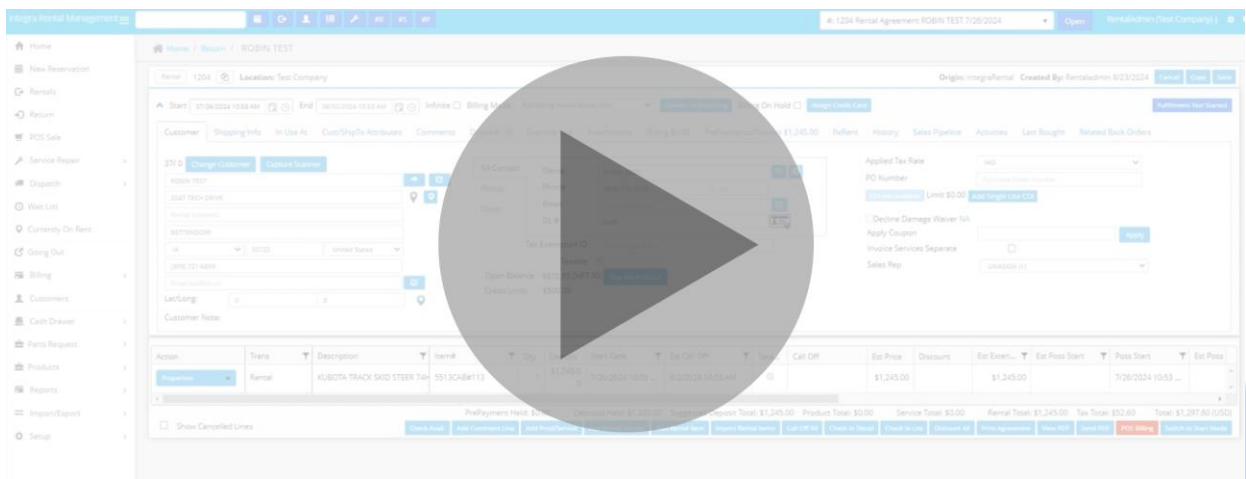
Brand New to integraRental 21.0

Credit Card Transaction Fees – Transaction fees for credit cards can now be passed on to the customer when using our integrated credit card services! When a customer pays for a rental, POS sale, service ticket, or prepayment/deposit using the credit card payment method, an additional line item will be automatically calculated and added to the total sale, representing the credit card charge. When a customer makes a payment toward open invoices, a separate and additional invoice will be generated for the credit card fee alone. No more manual calculations or after the fact add-ons to credit card transactions.

Credit Card Convenience Fee (CCF): CCF Bill Code:

CCF Charged for Refund:

Convert POS Billing to Recurring Billing – Convert rental agreements that have started out in the POS Billing mode into a Recurring Billing agreement, providing users with a more convenient way to bill ongoing, extended rental agreements. View the video below for a more comprehensive view of this feature.



Additional Telematics Partner SolarTrak – integraRental would like to announce our newest telematics partner SolarTrak, giving our users multiple options to suit their tracking and telematics needs. Accurately capture metered hour overages on long-term billings, track dispatch trucks, and utilize accurate GPS locations for theft prevention and recovery. Contact our sales team today to learn more or get started.

Consume Prepayments On Your Schedule – Prepayments collected for Rental Agreements can now be set to apply to the next invoice generated, giving users the ability to take advanced payments against rental agreements and consume them on initial or interim billing cycles. This allows users to identify prepayment income earlier than the final billing event of a rental agreement.

Created Date	Created By	Applied Invoice	Applied Date	When to Apply
08/20/2024	RentalAdmin			Last
08/20/2024	RentalAdmin			Last
08/20/2024	RentalAdmin			Next
				Last

Preps Now Seen as Dispatch Activities – Prep dispatch activities are now seen as “Real” dispatch activities, routes can be assigned and viewed in all areas where dispatch activities are present. This provides a smoother fulfillment process on customer pickup, and a more consistent user experience between Delivery and Prep activities. Check out the integraRental Mobile video below showing Prep activities as completable tasks in the app!



Prep Documents – The Prep dispatch activity has become more than a placeholder on the dispatch activity lists and can now be printed and used for pulling and prepping rental assets and sales products.

Delivery & Pickup Prompting – Eliminate forgotten service charges with this enhancement available in integraRental 21.0. With this addition, the Delivery & Pickup Service Item window will now appear automatically as ship to addresses are selected or saved to rental agreements. This reminds users to add required service charges for delivery and pickup activities. Please contact integraSoft support to turn on this new app setting.

Highlight Non-Standard Pricing – Transaction lines that have a price other than the standard or retail price of the item will be highlighted in yellow, providing the user with a simple visual indication of such changes.

Unit Price	Extension	Taxable	Discount	Discount Percent	Discount Amou...	Cost	Margin	Markup ...
\$8.34	\$8.34	<input checked="" type="checkbox"/>				\$6.95	\$1.39	20.00 %

Prior Markup & Price – Sales items effected by previous markup and price changes will now store the last markup or price data for the same customer on subsequent transactions, removing the need to research last purchased information regarding pricing. Control who has access to this by adjusting user permissions.

Markup & Pricing Permissions – Avoid unwanted changes to customer-specific pricing by unauthorized personnel by setting markup and pricing permissions for individual staff members, ensuring that product price adjustments that should be saved to a customer’s record are saved or left as one-off pricing changes.

Markup & Price Adjustments in Service – With this enhancement to service tickets, users are now able to markup or apply a percentage-based discount to parts on service tickets, providing service ticket administrators with the same tools and conveniences as the sales and rental coordinators.

Prepayments & Deposits Enhanced – Collect rental agreement and deposit amounts together during the prepayment process or apply them separately as needed to the Next or Last billing event.

	Held	Balance Due	Amount Being Paid
Rental	\$0.00	\$442.96	<input type="text" value="\$442.96"/>
Deposit	\$0.00	\$850.00	<input type="text" value="\$850.00"/>
Total		\$1292.96	\$1292.96 (USD)

Balance Eligible for Prepayment: \$1292.96

Edit Deposit Amounts – Suggested deposit amounts can now be altered easily during the POS Billing process, giving users the ability to collect only what they believe is necessary for an individual rental agreement.

1 - 3 of 3 items

PrePayment Remaining: \$0.00 Deposits Remaining: \$0.00 Suggested Deposit Total: \$850.00 Deposit to Collect: Product Total: \$0.00 Service Total: \$0.00 Rental Total: \$425.00 Tax Total: \$17.96 Total: \$1,292.96 (USD)

Payment Method: Reference No:

Amount:

Remaining On Account after Payment \$0.00

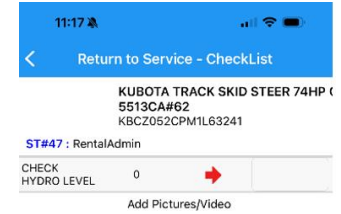
Start Rental

Unassign Assets in Web & Mobile – When your mobile users find themselves in a scenario where the asset ID/Serial Number assigned is no good, mobile users can now unassign rental assets from rental agreements and select new assets as needed. This eliminates extra work from desktop users and promotes accuracy.



To Bill, or Not To Bill –Increased visibility has been added to the reoccurring billing tab. A new column labeled “Rental Lines Not Billing” will show how many lines on that agreement are not yet ready to be billed. This allows users to identify agreements that are completely ready for billing, and those that may need a day or two more to be 100% eligible.

Parts & Labor at Check-In – If parts or labor need to be expensed during the on-return service check-in process, integraRental Mobile and web users can now add parts and labor charges to check-in tickets with just a few taps, seen here in the screenshot to the right.

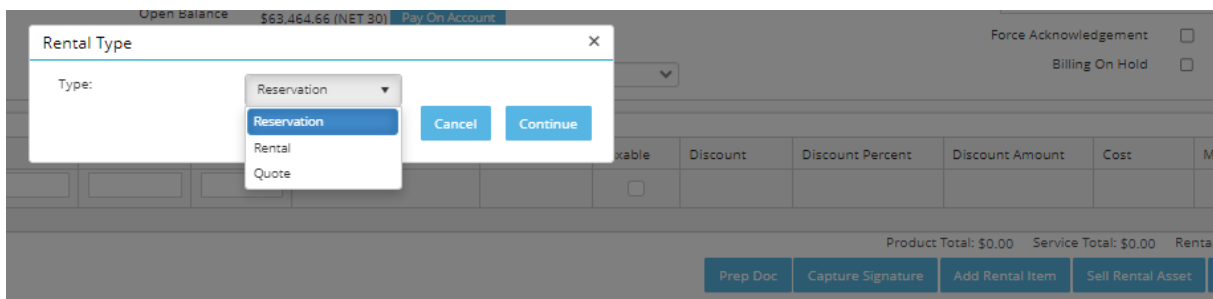


Parts & Labor at Check-In

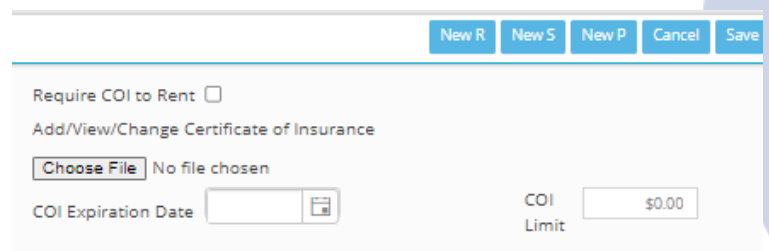
Smarter Searching in Mobile – Reduce customer check in time with this mobile enhancement. Scanning a rental asset’s ID barcode in the mobile app will now bring up the current agreement the asset is on, instead of a list of multiple agreements where the asset was present.

Maintain Correct Delivery Quantities – integraRental Mobile app users can now edit POS dispatched product quantities to ensure correct inventory levels and avoid costly billing errors. Previously this was only capable for dispatched rental agreements.

Simplified Sales & Rental Workflow – Start every transaction from the POS Sale module or Rental agreement screen and decide at any time to convert from a simple sale to a rental agreement when needed, or vice versa, going from a rental agreement to a sale. This change streamlines training and usage of the software in high POS Sale rental environments.



New Place To Start – If your order entry workflow is supported better by first searching for the customer and retrieving their information, the three new buttons added to the Customer Information page will allow you to launch directly into a Rental, POS Sale or Service Ticket when you are ready.



Assign Replacement Items Later – Identification of replacement rental assets is no longer required to generate a Replace Dispatch activity. This allows the user to identify the replacement item's ID/Serial Number after the activity has been created or assigned to a Route, streamlining the replacement process.



Shared Impact of Hard Down Assets – Users now have the freedom to add rental assets and related rental assets to a service ticket that may not have been on the initial ticket, allowing users to create a shared impact list of equipment without having to create a net new service ticket.



Reopen Service Tickets – Forget a labor charge? Identify the wrong part number? Reopen and re-bill service tickets in version 21 of IntegraRental instead of creating subsequent transactions to resolve these types of issues.

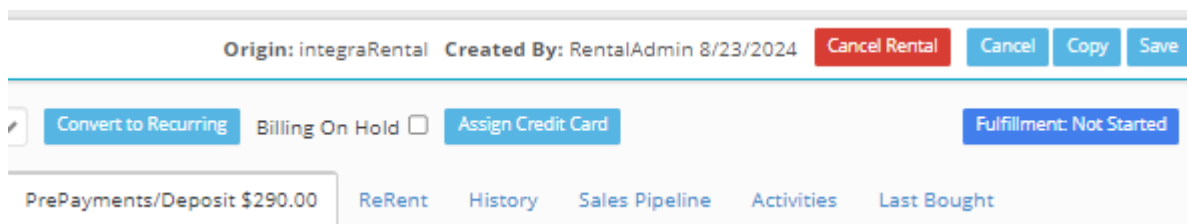


Warranty Remediation Made Easier – Conveniently identify service ticket lines that have a pending warranty remediation event with the new warranty remediation indicator added to all service ticket parts and labor lines.

Non-Billable Parts on Service Tickets – When adding parts or labor to billable customer service tickets, users can now identify line items as Billable or Not Billable, allowing for one service ticket to satisfy all repair needs and fees.

Search Customer Equipment List – A new search field has been added to the Equipment tab of the customer information page, making it easier to find customer owned equipment by description or serial number search.

Fulfillment Status Indicator – Select from six preset order fulfillment statuses or add your own to provide your team with consistent order fulfillment intelligence throughout the transactional process.



The screenshot displays a software interface for a rental agreement. At the top, it shows 'Origin: integraRental' and 'Created By: RentalAdmin 8/23/2024'. Below this, there are several action buttons: 'Cancel Rental' (red), 'Cancel' (blue), 'Copy' (blue), and 'Save' (blue). A section below contains 'Convert to Recurring' (blue button), 'Billing On Hold' (checkbox), 'Assign Credit Card' (blue button), and 'Fulfillment: Not Started' (blue button). At the bottom, there is a 'PrePayments/Deposit \$290.00' field and a navigation menu with links for 'ReRent', 'History', 'Sales Pipeline', 'Activities', and 'Last Bought'.

Copy POS Sale – Similar to the copy function of rental agreements, the copy sale option allows users to make subsequent sales of the same products and services to customers who have made prior purchases, cutting down on search and data entry time and effort.

Pre-Payment Capture in POS Sale – The ability to capture a pre-payment from a customer has been added to the POS Sale module, users can also request and collect online, removing the delays that can be caused by requiring in-person signature and payment collection.

Future Rental Start Times – When creating rental agreements for future dates, integraRental can now automatically set the rental agreement begin time to match the time a location's business hours begin. This streamlines the order entry process and mitigates asset preparation priority mistakes.

Use for Possession End? – If your rental assets are more commonly picked up by your delivery team and not returned by the renters, set your default answer to NO for the question "Use (call off date) for Possession End." This will help avoid availability mistakes and aid with asset pickup management. Please contact support to turn on this new app setting.

Easier Navigation from Dispatch – Quickly access the POS Sale or Service Ticket associated with dispatch activities via the Action menu on the Dispatch/Rental Asset and Dispatch/Dispatch Activity list views.

More Details in List Views – Multiple list views have newly-added fields available including Last Emailed Date, Last Emailed By in the Batch Email Invoices list, asset Location details, Rates on the Currently on Rent list, and Created Date/By and Changed Date/By on the Rentals list.

Comment Lines – With this new button, users can now pass information onto the line notes of rental agreements and invoices, allowing users to more easily communicate more information to their customers.

Pickup Contact Required – A new application setting can be turned on requiring users to collect the name and phone number of the Pickup Contact when a delivery address is not entered on a POS Sale or Rental Agreement, ensuring that users collect the information to be verified at time of pickup.

Ship To Changes – New fields have been added to customer shipTO's, that include PO number, default contact person and shipTO note. When a shipTO has been selected with that information integraRental will push the contact person information to the "other contact" field and will autofill the PO number.

Choose Your Map App – Users of Apple devices can now elect to use the Apple Maps or Google Maps application by default when viewing driving directions provided by the integraRental Mobile application.

Show Only Completed – The Dispatch Activity list view can now be filtered to show only those dispatch activities that are completed, hiding any that are still pending.

On Return Service Icons – Rental assets on open Check In, Return to Service tickets will be identified in all areas where assets are selected or assigned, avoiding potential conflicts with upcoming assignments.

Scan To Add Products in Rental – The same ability to use barcode scanners when adding products to POS Sales has been extended to the Rental Agreement module. Users can now scan a product that will be added to the rental agreement with a quantity of 1, while respecting the retail or customer pricing as done in the POS Sale module.

Quick Access to POS Line Properties – Clicking on the POS Sale line will now bring up the Properties tab, just as same as opening the Action menu and selecting the Properties option, saving time at the counter.

Sold Rental Asset Details on Receipt/Invoice – The details of make, model, and hours on machine have been added to the description field of the POS Sale receipt and the POS Sale Invoice when selling rental assets to customers.

Link to Rental Agreement from Currently On Rent – After tapping on an asset on the currently on rent list view in mobile, users now have the option to be taken to the rental agreement page directly with just one tap.

ERP-Only Features

Rental Asset Life Cycle Summary – Follow the rental asset’s journey from purchase to rental to sale using the new Life Cycle tab on the rental asset item detail page, giving users quick access to dates and values to make strategic business decisions regarding rental assets.

Sale of Serialized Products – Identify the specific serial number of serialized sales inventory items in the POS Sale, Rental Agreement, and Service Ticket modules of integraRental version 21, which keeps users from having to generate sales directly from integraERP.

More Data, More Columns – Added the Bin Location, Vendor Name, Vendor Stock Number, and Product Category (PCAT) columns, making selecting sales products even easier when carrying multiple vendor lines.

Generate ReRental PO’s – This update to the billing process of ReRental assets creates a Purchase Order to match up with your ReRent vendor’s invoice whenever you generate an invoice to be paid by your renter, giving users the end-to-end information required to maintain profitability and customer satisfaction.

Product Bin Locations – Product Bin Locations will now be printed on dispatch activity screens in the mobile application, as well as on the dispatch activity PDF document, giving order fulfillment personnel the information they need to be efficient and accurate.

Any User, Any Store – Users of integraRental version 21 will now have the ability to sell any rental asset, from any location, regardless of the user’s assigned location, eliminating the need to update the user’s assigned location prior to an asset sale transaction.

Back Order List View – View all back ordered products for all rental, sales and service tickets in one convenient place. The new list provides information such as Product Name and Description, Customer Name and contact info, and order number and value details.