

# RECURRING RENT GUIDE



Recurring rental charges are a way to bill for items in Quantify that aren't stocked in inventory. Charges will recur each billing cycle until a Rent Stop date is entered for the recurring item. When a recurring rent item is "shipped" to a job site it is added to the inventory at the job site and can be viewed in the Products tab. Recurring rent items are not stocked and are not subtracted from Branch Office inventory. Recurring Charge items are available to display on many Quantify reports and pivots.

To set up Recurring Rent in your Quantify database, follow these basic steps, which are detailed in the sections below.

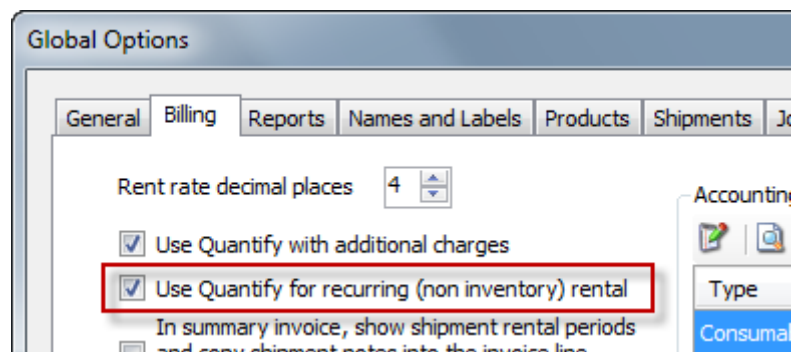
- Enable Recurring Rent at the Global level; see the *Enabling Recurring Rent* section.
- Set up Recurring Rent items in Recurring Rent; see the *Set up Recurring Rent* section.
- Update Rate Profiles; see the *Update Rate Profiles* section.

## Enabling Recurring Rent

The Recurring Rent feature must first be enabled globally for your database. To do this, select 'Global Options' from the **Tools** menu.

On the Billing tab, check the 'Use Quantify for recurring (non inventory) rental' checkbox.

This enables the Recurring Rent feature globally for your database and turns on the Recurring Rent catalog.

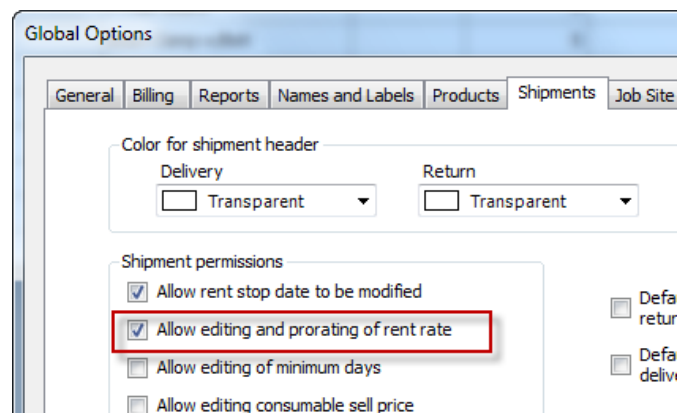


## Allow Editing of Recurring Rent Default Values

The ability to edit default charges per unit on Recurring Rent for shipments is set globally in your database. To set this default, navigate to the Shipments tab in Global Options.

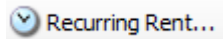
Check the 'Allow editing and prorating of rent rate' check box to allow the editing of default charges per unit on Recurring Rent for shipments.

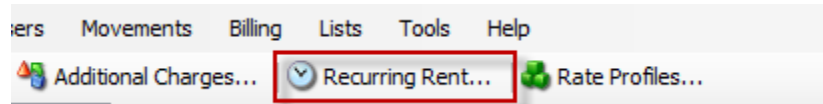
Note: this additionally allows editing and prorating of rent rates of products on shipments.



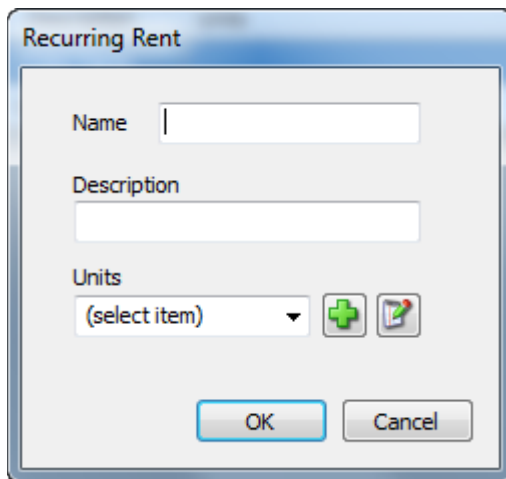
# Set Up Recurring Rent

To add a recurring rent item to a shipment the item must first exist in Recurring Rent. Initially Recurring Rent is empty. To add items to Recurring Rent, use the instructions below.

 Click the RECURRING RENT... button. This will launch the 'Recurring Rent' dialog.



To add a Recurring Rent item, use the ADD button. This will launch a new 'Recurring Rent' dialog.



The screenshot shows the 'Recurring Rent' dialog box with the following fields and controls:

- Name:** A text input field.
- Description:** A text input field.
- Units:** A dropdown menu with '(select item)' selected, and two small icons (green plus and pencil) to its right.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

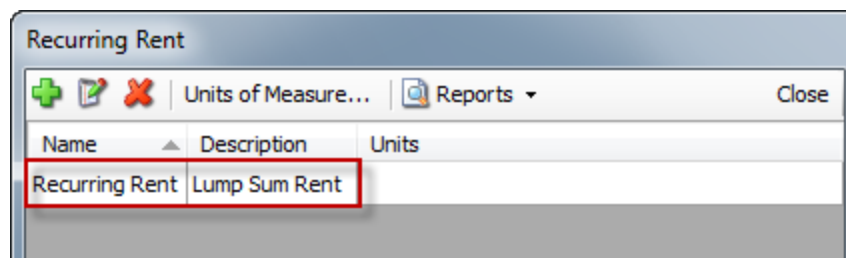
Name the Recurring Rent item and enter the appropriate Description information.

The 'Units' field is optional. Select the Units drop down and select the Units to be used for this Recurring Rent item. Units may be added to the database with the ADD button.

Note: Units available here are shared with the Additional Charges Units.

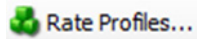
Click OK when ready.

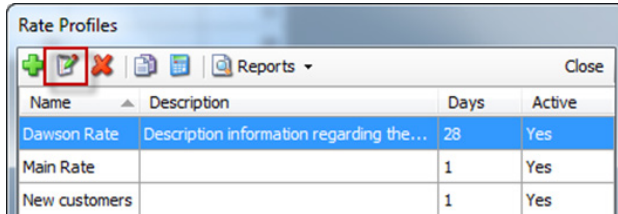
In this example, a Recurring Rent item has been added to Recurring Rent and can now be added to shipments and estimates, and invoiced to a job site.



# Updating Rate Profiles with Recurring Rent Pricing

Once Recurring Rent items have been added to Recurring Rent, their default charges per unit can be added to Rate Profiles. Edit any existing Rate Profiles that should have default charges per unit for Recurring Rent items and navigate to the 'Recurring Rent' tab.

 Click the RATE PROFILES...button. This will launch the 'Rate Profiles' dialog.

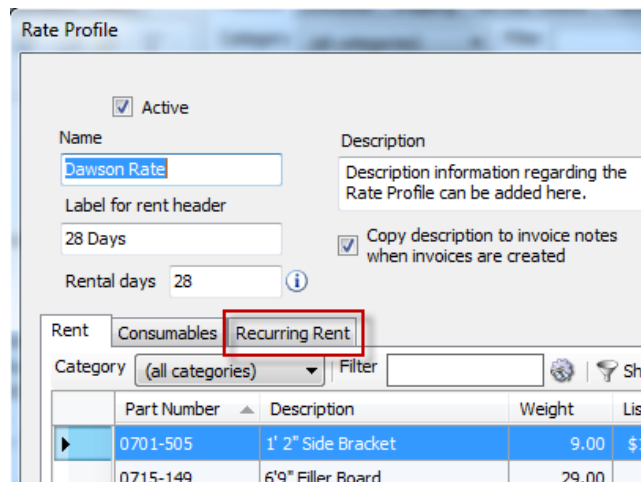


Put focus on the Rate Profile, and click the EDIT button.

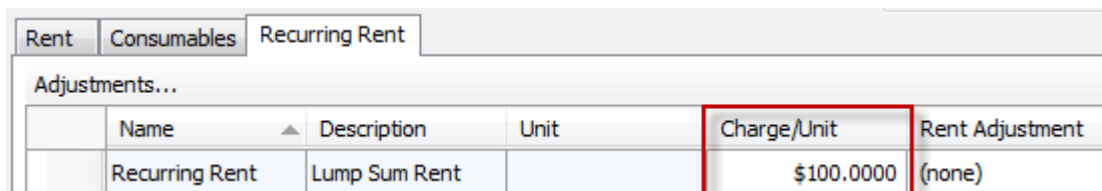
This will launch the Rate Profile selected.

Select the 'Recurring Rent' tab.

The Recurring Rent items entered into Recurring Rent will be available in the grid.



Enter the appropriate 'Charge/Unit' as needed for individual Recurring Rent items. The amount entered will default on the Recurring Rent tab when the item is added to Shipments. See the *Adding Recurring Rent Items to Shipments* section. In this example a Charge/Unit of \$100.00 has been entered for the Recurring Rent item 'Recurring Rent'.



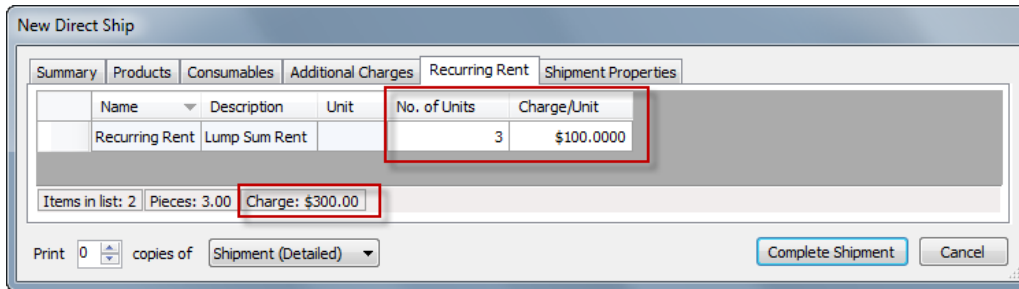
## Using Recurring Rent with Single Rate database

When the Quantify database is using Single Rate mode, costs for recurring rent are a manual entry when adding to Shipments.

# Adding Recurring Rent Items to Shipments

Recurring Rent items may be added to shipments on the 'Recurring Rent' tab. Recurring Rent items and the default charge per unit will be displayed as previously set up in Recurring Rent and Rate Profiles. Note: the Recurring Rent tab will be displayed and is active only if the job site is billable. No default value for Charge/Unit will display if a value hasn't been included in the Rate Profile used for the Job Site.

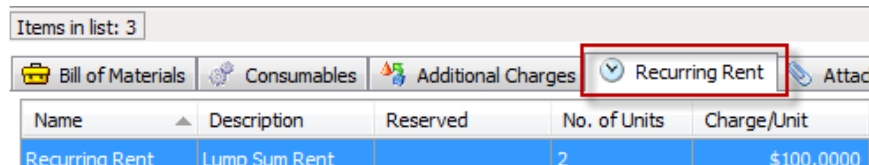
In the example below, 3 units of Recurring Rent have been added to this shipment. The customer will be charged \$300.00 for the recurring rent. This charge will begin based on the Rent Start date of the shipment; and will recur each billing cycle until the recurring rent items are returned on a return shipment with a Rent Stop date entered.



When the shipment is complete, the Recurring Rent items are added to the product balances at the job site and are viewable in the Products grid. In the example below, the three units of Lump Sum Rent have been added to the job site balances.

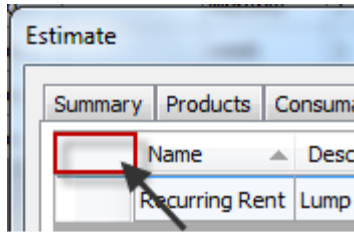
Part Number	Serial Number	Description	On Rent	In T
115103		3' Ladder	5	
1225-10		10' Tubes	5	
1225-13		13' Tubes	5	
1225-16		16' Tubes	5	
33-10		Leg Iron	5	
BUGGIE		Scaffold Buggie	5	
Recurring Rent		Lump Sum Rent	3	

Recurring Rent information is available in the Shipment Details of completed shipments. In the example below, the Recurring Rent item 'Lump Sum Rent' is viewable in the Recurring Rent tab for a delivery.



# Adding Recurring Rent Items to Estimates

The default charges per unit for Recurring Rent items are initially blank when creating Estimates. In order for default charges per unit to display, a Rate Profile must be selected. To select the Rate Profile to use with the Recurring Rent items, follow the steps below or manually enter a value.



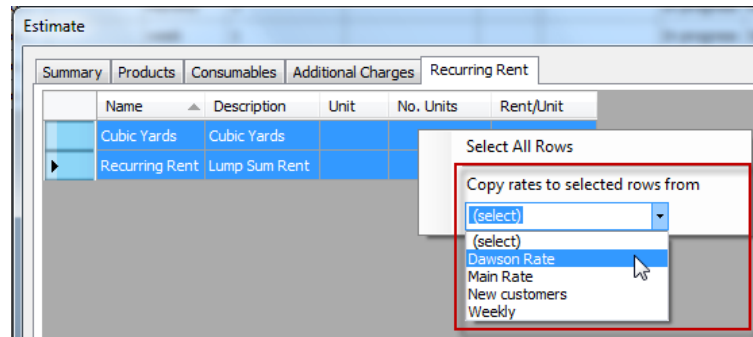
First, select the rows in the grid to which to apply the Rate Profile. To select all of the rows...

Click the 'cell' in the corner of the grid. This will select all rows in the grid.

Or select an individual row to apply a Rate Profile.

Single click on the row to select.

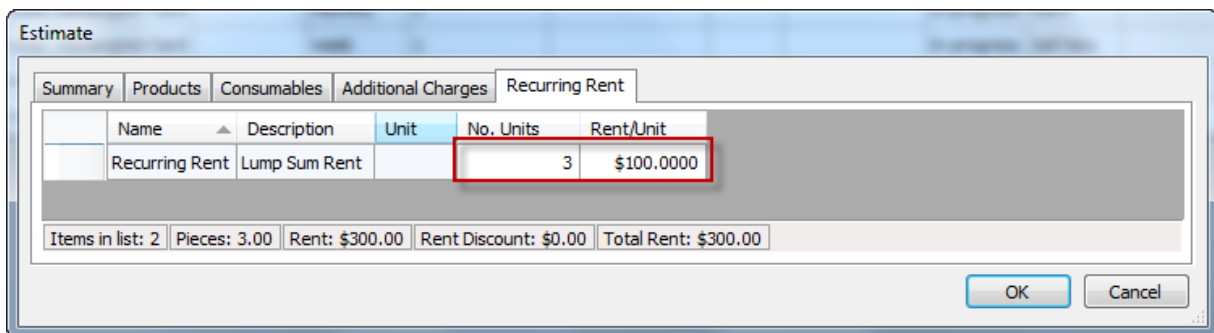
Next, select the Rate Profile for the row(s) selected. Right click and select the Rate Profile from the 'Copy rates to selected rows from' on the right click menu.



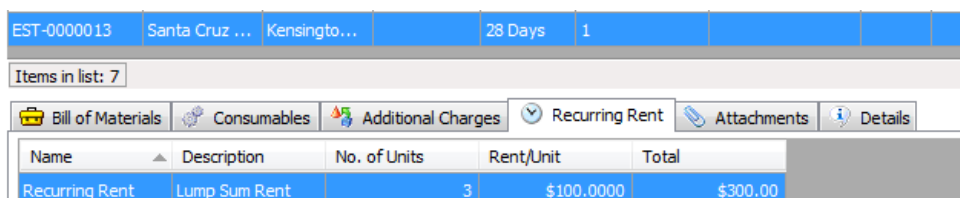
The 'Rent/Unit' column will display the associated Rate Profile default charges on the rows selected.

These may be overwritten if necessary.

The example below shows the updated Recurring Rent grid with the Rent/Unit costs from the Rate Profile. Enter the count of 'units' for each Recurring Rent item to be added to the Estimate. In this example 3 units of 'Lump Sum Rent' has been entered. Click OK when ready.



Once the Estimate is completed, Recurring Rent information is available in the Estimate Details of completed Estimates. In the example below, the Recurring Rent item 'Lump Sum Rent' is viewable in the Recurring Rent tab.



## Ending Recurring Rent

Rent on recurring rent items recurs until the recurring rent item has been returned from the Job Site through a return shipment with a Rent Stop date. In the example below, three units of Lump Sum Rent are set on a return shipment to the Job Site. Rent will stop as of the Rent Stop date entered on the Summary tab.

The screenshot shows a software window titled "New Direct Ship" with several tabs: Summary, Products, Additional Charges, Recurring Rent, and Shipment Properties. The "Recurring Rent" tab is active, displaying a table with the following data:

Name	Description	Unit	Available	No. of Units
Recurring Rent	Lump Sum Rent		3	3

Below the table, there is a summary bar showing: Items in list: 2, Pieces: 3.00, Charge: \$0.00. At the bottom of the window, there is a "Print" button with a value of 0, a "copies of" label, a dropdown menu set to "Shipment (Detailed)", and two buttons: "Complete Shipment" and "Cancel".

When Recurring Rent items are returned from a job they are subtracted from the balance at the job site, but are not added to the Branch Office balance.