



## RTS – Rental Tracking Solution:

### ***Setting up an Item Order***

RTS provides for managing rental item orders provided to Customers. These customers can be external or internal to the company. The process involves 7 essential steps (outside of the initial setup and configuration of RTS):

- 1) ***Item “Masters” must first be set up within the application. These can be imported or added manually within the Master Function.***
- 2) ***Next, individual Items, Tools, or Equipment are then added to the database. Items also can be imported or added manually within the Item Function.***
- 3) ***From the Customer Function..... ‘Customers’, whether persons, places, projects or jobs, etc., are then added to the database. The definition of “Customer” is flexible, dependent really upon to whom, what or where items will be supplied.***
- 4) ***Orders are entered from the Order Function***
- 5) ***Items are then Shipped, based upon Pick Lists issued and items Picked, via the SHIP or Order Pick & Ship Functions. Pick and Ship can be via a mobile handheld terminal (real time, wireless network connection), or from the SHIP Function on the RTS application.***

**6) Items are received back into inventory from the CHECK IN Function.**

**7) An INVOICE Function is available, once items have shipped.**

**This document addresses Step 4: Adding Item ORDERS to the system.**

## RTS Order Setup:

Once a Customer is set up within the system, Orders can be set up for that Customer:

Select the Order function:



Select Order (F2) | Select "Customer Order" tab | Select New Order

Fill in all pertinent data:

Rental Order

Find Order (F1)      Order (F2)      Order Detail (F3)

**Order**

**Customer Order**

Facility:

Order #:

Order Type  
 Order  
 Quote  
 Request

Dates  
 Order:  ...  
 Required:  ...  
 Start Billing:  ...  
 Stop Billing:  ...

PO #:

Acct. #:

Order Notes:

In House Notes:

Payment Terms:

Close Order

**Order Items**

Bill To:  ...

Ship To:  ...

Ship To Contact  
 Attn:  ...  
 Phone:   
 Fax:   
 Email:

Ship Via:

Save      Cancel

Total:

Some pre-defined items are selectable by clicking on the "3 dot" ellipses boxes:

Rental Order

Find Order (F1)      Order (F2)      Order Detail (F3)

**Order**

**Customer Order**

Facility: ACME Central Warehouse

Order #:

Order Type  
 Order  
 Quote  
 Request

Dates  
 Order: 8/13/2014 ...  
 Required: 8/13/2014 ...  
 Start Billing: 8/13/2014 ...  
 Stop Billing:  ...

PO #: 123456

Acct. #: ABCdef

Order Notes: Order notes, if needed

In House Notes: In House notes, if needed

Payment Terms:

Close Order

**Order Items**

Bill To: Gene's Generators  
 8765 Main St  
 City Center  
 Milwaukee, WI 53442

Ship To: Gene's Generators  
 8765 Main St  
 City Center  
 Milwaukee, WI 53442

Ship To Contact  
 Attn: Bill Jones  
 Phone: 123-456-7890  
 Fax: 123-456-0987  
 Email: bjones@yahoo.net

Ship Via:

Save      Cancel

Total:

Select **Save** when complete.

Next, Select Order Items:

Rental Order

Find Order (F1)      Order (F2)      Order Detail (F3)

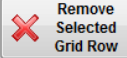
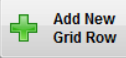
**Order**

Customer Order

Bill To Customer:

Ship To Customer:

Order #:

 Remove Selected Grid Row       Add New Grid Row

**Order Items**


Dates


Order: 8/13/2014

Required: 8/13/2014

Start Billing: 8/13/2014

Stop Billing:

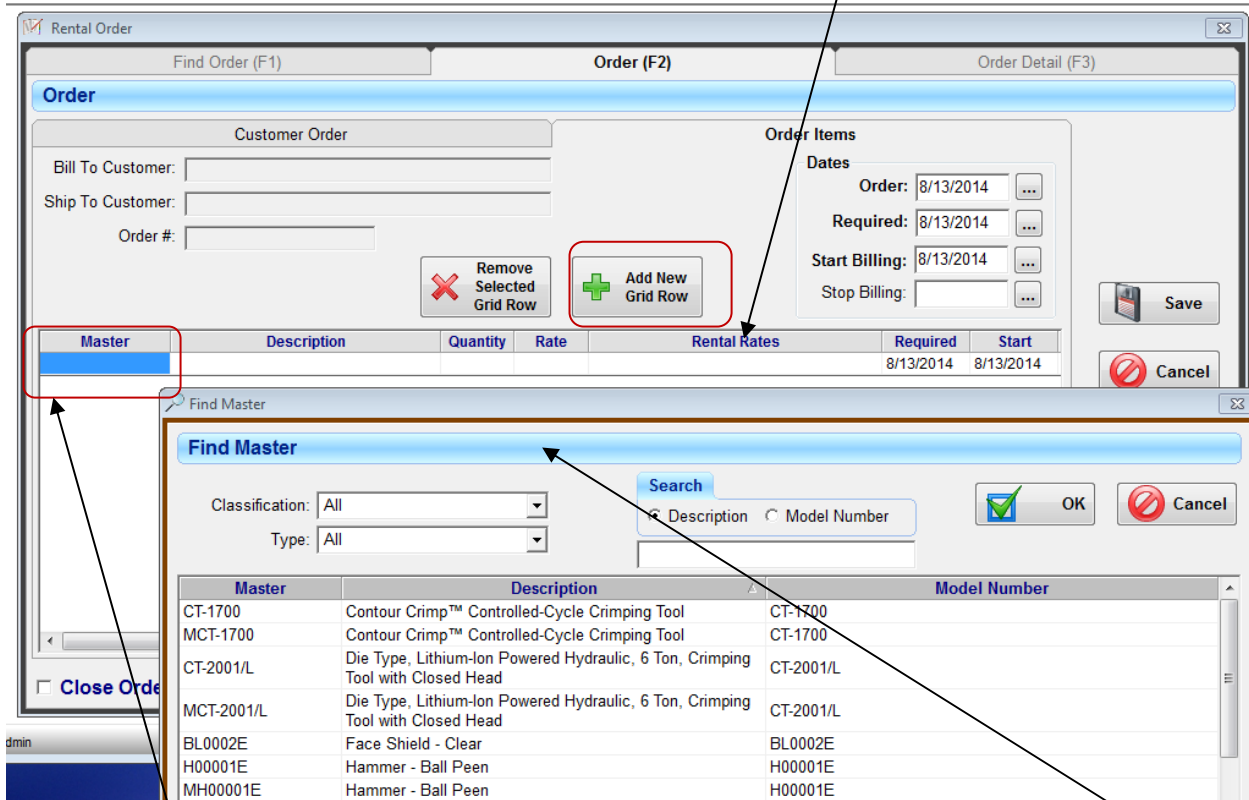
 Save

 Cancel

Master	Description	Quantity	Rate	Rental Rates	Required	Start
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Close Order      Total:

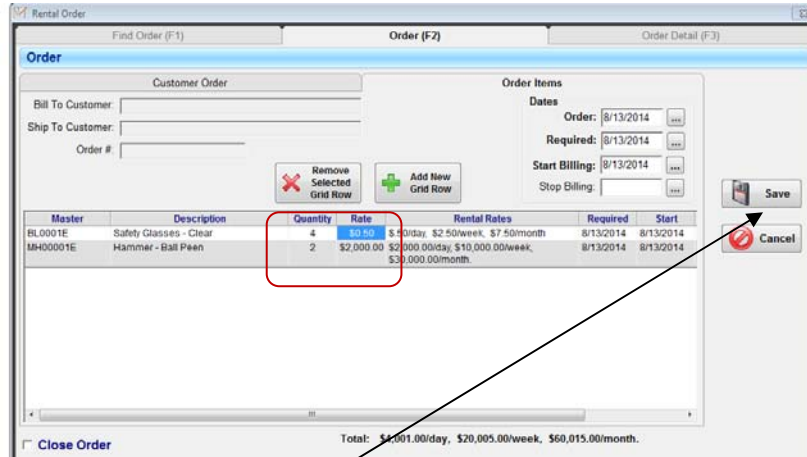
Select Add New Grid Row - *this add a blank line item to the grid*



Next, Select the field under the Master column header - *this pops up the Find Master List:*

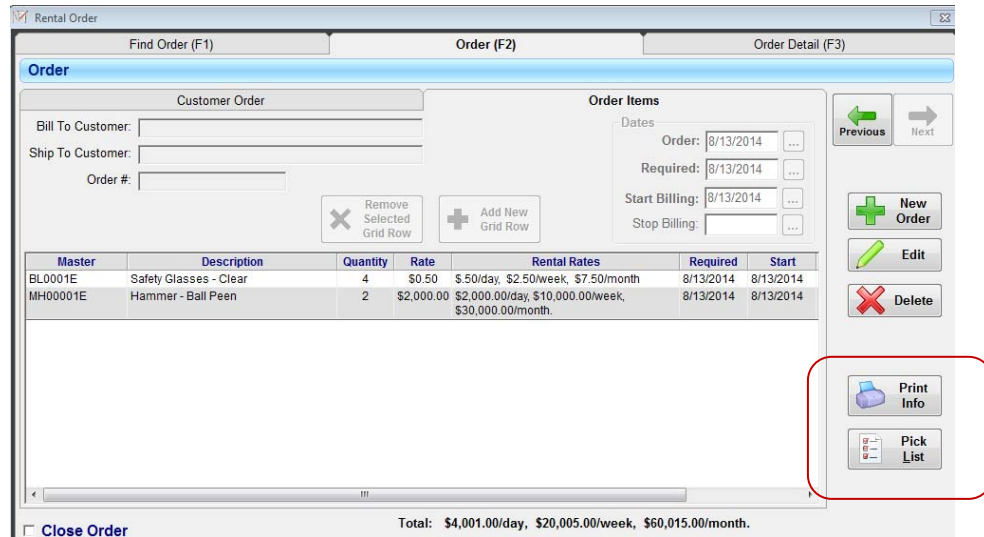
*Locate, using the right side scroll bar, the master item ordered, or enter its Description or Model Number in the Search field.*

Once you have your item in the grid line, Enter Quantities or adjust Rates as desired.



SAVE when complete

Now, the Order and a Pick List can be printed:



If printing the Pick List, from the Pick List Report screen:

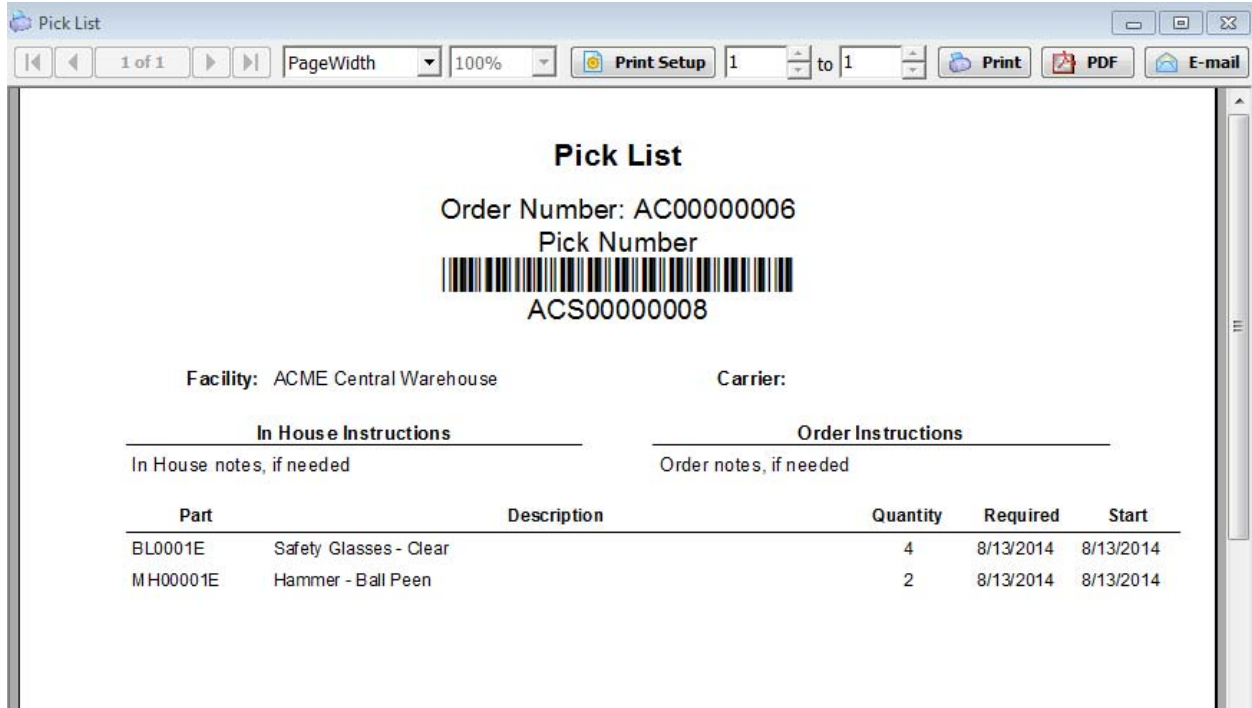
Select *Check All*, then, Select *OK* to confirm all items are to be picked:

The screenshot shows a window titled "Pick List" with a "Pick List Report" header. Below the header, there is a blue bar with the text "Pick List Report". Underneath, a blue bar contains the instruction: "Check a Row to include it in Pick List. Modify the 'Pick Quantity' column as desired." Below this, there is a "Check All" button with a checked checkbox, a "Facility:" dropdown menu set to "ACME Central Warehouse", an "OK" button with a checked checkbox, and a "Cancel" button with a red prohibition sign. Below these buttons is a table with the following data:

Check	Master	Description	Remaining Quantity	Pick Quantity	Required	Start
<input type="checkbox"/>	BL0001E	Safety Glasses - Clear	4	4	8/13/2014	8/13/2014
<input type="checkbox"/>	MH00001E	Hammer - Ball Peen	2	2	8/13/2014	8/13/2014

*(Or, check only those item boxes, manually, to print a list for only certain items to be picked at this time.)*

Pick List prints....



With Pick List in hand, items can now be picked to Ship, either by using the Pick/Ship function on the mobile, handheld data terminal, or by using the Ship Function in the RTS Application.

Order item details can be found on the Order Detail tab (F3), once items have been Picked and/or Shipped:

