




Rental Contracts



Modules > Automated Rental Management (ARM) > Main > Contract Entry

1 Enter the Correct prefix for the territory the equipment will be on rent in then hit the next button 

* A list of prefixes can be found at the end of this document.

2 Enter the Customer Number. If you're not sure of their number, you can use the search button.

3 Select the billing code. Most rentals are Arrears Default Rental (28 Day)- DR.

Jeeps and some integrity equipment are done in the Daily Profile -DA

4 Enter the ship date.

5 Verify that the Begin Date is the same as the Ship Date.

* Any field that has a magnifying glass is searchable. Within that search field all are customizable. If you want to set up custom searches, refer to the custom look ups job aid.

Contract Entry (TTT) 03/27/2019 *** Shipped ***

Contract Number R243722

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | 6. Preview | 7. Freight

Contract Date 02/02/2018 Doc Type Rental Contract Type ***** Shipped **** Reason

Master/Repeat Order Customer No. ELKH003 WOOD GROUP USA, INC

Profile DR Arrears Default Rental(28 Day)

Ship Date 02/02/2018 FRI
Pickup Date 02/02/2018 FRI
Due In Date 03/01/2018 THU

Billing Cycle
Begin Date 02/02/2018 FRI
End Date 03/01/2018 THU
(28 Days) Suspend Billing

Print Contract Rental Agree Sent
Print Pick Sheets Agreement Signed
Print Prices Off SOS
Fax: 307-789-7145
Batch Fax

Contract Taken By TJM Input By TJM Hold Contract/Billing Future Start Awaiting Freight

Quick Print Quick Batch Recalc Accept Cancel Void

6 Status Ship Job No. 7 P100005
8 Contact VICKI JACKSON (123)456-7890
9 Terms Code 05 On Receipt
10 Cust PO TBD
Salesperson 0007 JOHN LUCKI

Whse 003 Aurora, CO Rental Equipment
FOB MANSFIELD
Ship Via TRINITY
Delivery Code
Pickup Code
Route Number Stop
Number of Shipping Labels

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(28 Days) Suspend Billing

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Fax: 307-789-7145
Batch Fax

Contract Taken By TJM Input By TJM Hold Contract/Billing Future Start Awaiting Freight

Quick Print Quick Batch Recalc Accept Cancel Void

Whse 003 Aurora, CO Rental Equipment
FOB MANSFIELD
Ship Via TRINITY
Delivery Code
Pickup Code
Route Number Stop
Number of Shipping Labels

6 Verify the Status is "Ship"

7 Enter the Job Number. ****DO NOT USE** job number P001000 anymore**

8 Enter the contact name and phone number.

9 Verify the Terms code is 05 -On Receipt. Enter the Customer PO. If you do not have a PO yet, you **MUST** enter TBD (must be in all caps)

10 Select the salesperson number.

11 Enter the warehouse of the territory the unit(s) will be on rent in.

12 Enter ORIGIN for the FOB.

13 Enter the Ship Via.

★ For contracts going on future start or going to be on hold for freight, please refer to last pages of job aid.

Contract Entry (TTT) 02/02/2018 *** Shipped ***

Contract Number R243722

Customer No. ELKH003 ELKHORN PIPELINE SERVICES

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | 6. Preview | 7. Freight

Tax Schedule AVATAX AvaTax Schedule

Ship To KERS

14 Tax Schedule AVATAX AvaTax Schedule

15 Bill To Address

Name ELKHORN PIPELINE SERVICES

Address 17325 PARK ROW

ZIP Code 77084

City HOUSTON State TX

Country USA United States

Phone Number 307-783-5022

16 Ship To

Name ELKHORN CONSTRUCTION

Address 123 STREET NAME

ZIP Code 80644

City KERSEY State CO

Country USA United States

Phone Number

Attachment

Quick Print Accept Cancel Void

14 Verify the Tax Schedule says "AvaTax"

15 The Bill To Address will automatically populate.

16 Select the ship to from the available codes or enter the Ship To Address manually if not going to be a common address. Make sure to enter a good shipping address so that the taxes will be correct. You can verify the address by clicking



*Refer to end of job aid to learn to create a common ship to code.

17 On the lines tab, enter the item code that will be going on rent. If there is support equipment being shipped with the main unit, add the items in lines 2 and on until they're all on the contract. Remember each piece of yellow iron should have it's own contract.

Contract Entry (TTT) 02/02/2018 *** Shipped ***

Contract Number R243722

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | 6. Preview | 7. Freight

Quick Row Method: DD - Arrears Billing

Line	Item Number	Qty	Description	Unit Price	Extension
1	DOZERD8TRIP	1.00	Dozer, D8T w/Ripper	625.00	17,500.00
2					

17 1 18

Qty Shipped

Unit Measure

Discountable

Commissionable

Subj to Exempt

Job Number

Enter item number: F2=List, F3=List Alias, F8=List Kits, F9=Reservations

Ship Lines Return Lines

Quick Print Accept Cancel Void

18 Enter the quantity ordered.

Contract Pricing Matrix

Item: DOZERD8TRIP Dozer, D8T w/Ripper

Hourly Rate	Daily Rate	Weekly Rate	Monthly Rate
0.00 hrs.	0 days	0 wks.	1 mths
.00	2,333.33	5,833.33	17,500.00

Ok Cancel

19 Once you get to the Unit Price, the Contract Pricing Matrix will pop up. Verify the rates are correct with what the sal-esteam provided you. Then click OK.

Contract Entry (TTT) 02/02/2018 * Shipped *****

Contract Number: R243722

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | 6. Preview | 7. Freight

Quick Row: 1 Method: DD - Arrears Billing

Line	Item Number	Type	Description	Qty Ordered	DS	Unit Price	Extension	
1	DOZERD8TRIP	R	Dozer, D8T w/Ripper	1.00		625.00	17,500.00	R243722
2								

Qty Shipped: .00

Unit Measure: EACH

Discountable:

Commissionable:

Subj to Exempt:

Job Number: P000188

Enter quantity shipped

Ship Lines Return Lines

Quick Print Quick Rate Recalc Accept Cancel Void

20 In the secondary grid, find the Qty Shipped line and enter the quantity you will be shipping.

Contract Line Transaction Detail

Line: 001 DOZERD8TRIP

Row	S/R No	Type	Status	Ship Date	Rent Begins	Rent Ends	Bill Rent Date
1		Shipper	New	02/02/2018	02/02/2018	03/01/2018	

Ship Date: Day: FRI Time: 8:15AM

Begin Date: Day: FRI Time: 7:49AM

End Date: Day: THU Time: 7:49AM

Invoice Number: Current: Previous:

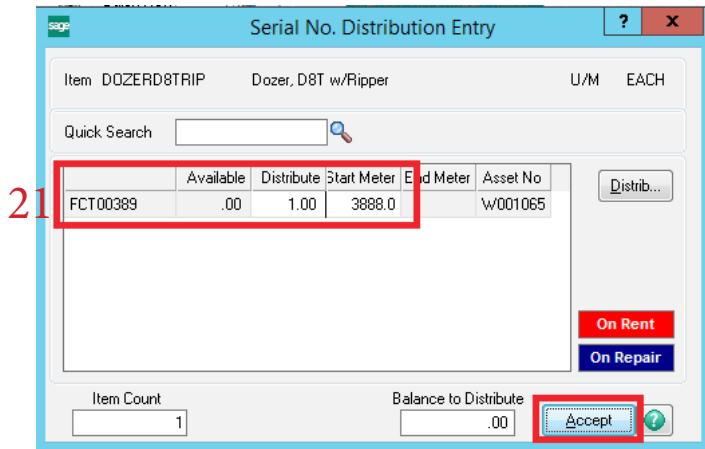
Changed: 3/6/2019 By: TJM

Quantity Damaged: .00

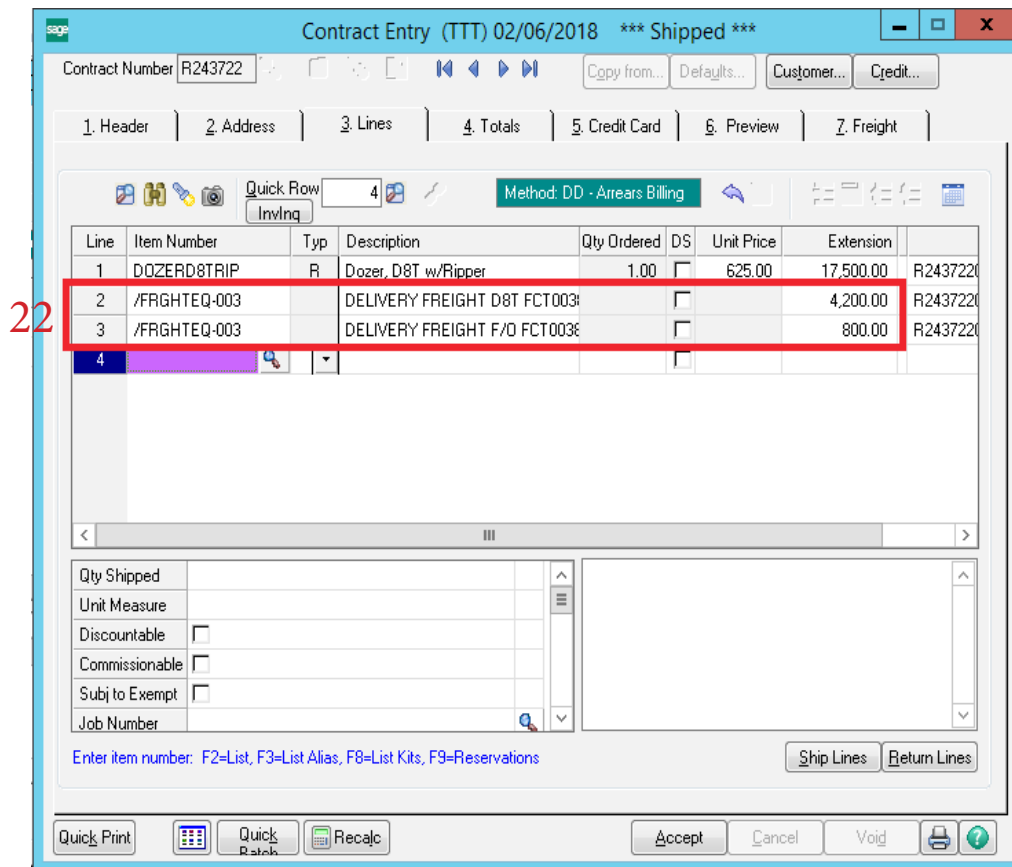
Created: 3/6/2019 By: TJM

Ok

★ Make sure to verify the ship date matches the billing cycle on the header by clicking the transaction zoom above the lines click okay when finished.

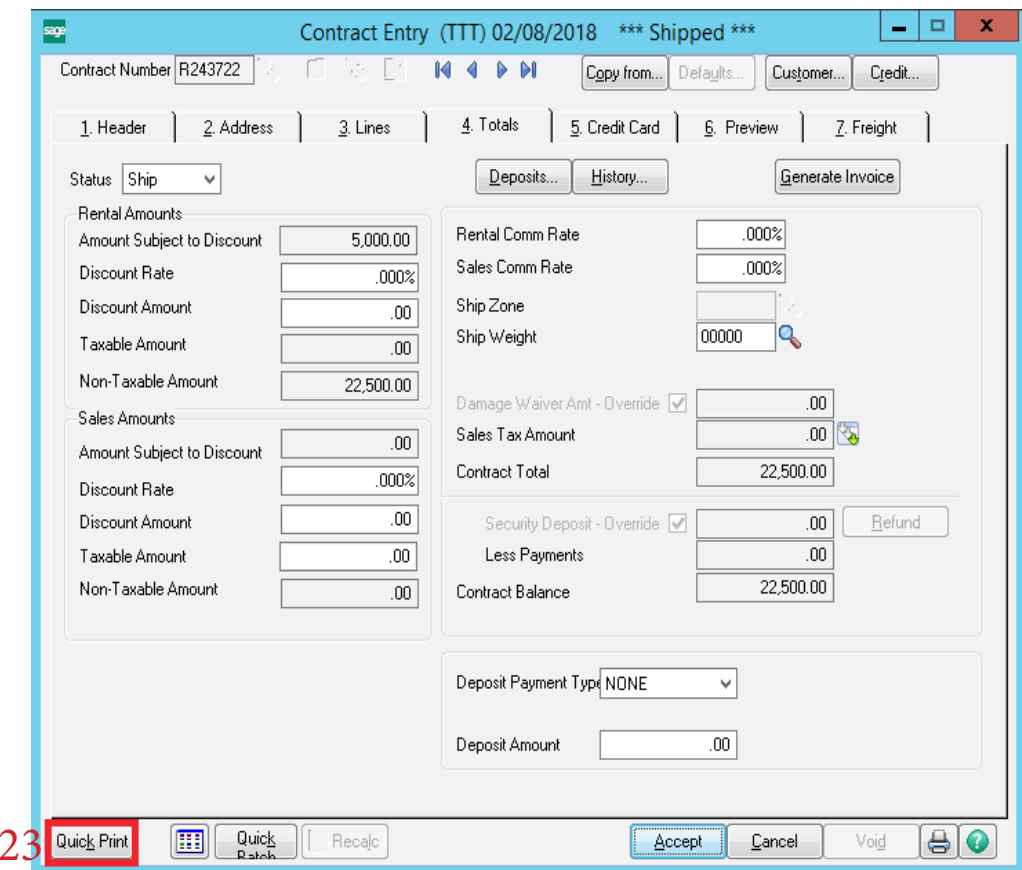


21 Once the quantity is entered, the Serial No. Distribution Entry window will pop up. Locate the serial number. Enter a quantity of one in the Distribute box and the hours on the machine in the Start Meter field. Then click accept.

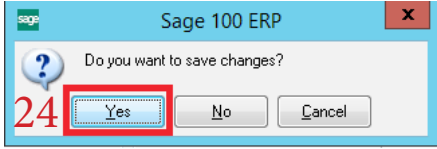


22 If there is freight to be charged to the customer, enter it. In the description you must enter if it's delivery or return freight, what type of unit the freight is for, and serial number. (i.e. "DELIVERY FREIGHT FOR D8T DOZER W/ RIPPER S/N FCT00389")

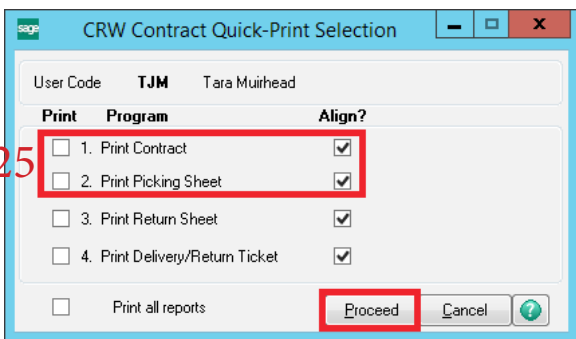
23 Verify all information entered is correct on each tab starting with the header tab and following through to the totals tab.



24 On the totals tab, click “Quick Print” at the bottom left to print the contract and pick sheet. (or preview to save a digital copy of the contract)



25 Click Yes to save the changes you’ve made.



26 From here, you can select to print the contract, the picking sheets, or both.

Contract Prefixes

B - Midland, TX (015) Integrity Equipment

E - Pecos, TX (006) All Equipment and Midland, TX (015) Construction Equipment

H - Houston, TX (620) Integrity Equipment

J - El Reno, OK (660) All Equipment

K - Oak Ridge, TN (010) All Equipment

L - Ruston, LA (730) All Equipment

N - Mansfield, PA (009) All Equipment

R - Aurora, CO (003) All Equipment

T - Houston, TX (620) Construction Equipment

W - Eighty Four, PA (002) All Equipment

Contract Entry (CCP) 03/06/2019 *** Shipped ***

Contract Number K249035

Contract Date 02/18/2019 Doc Type Rental Contract Type **** Shipped **** Reason

Master/Repeat Order Customer No. ONES001 ONE SOURCE EQUIPMENT RENTALS

Profile DR Arrears Default Rental(28 Day)

Ship Date 02/18/2019 MON
 Pickup Date 03/17/2019 SUN
 Due In Date 03/17/2019 SUN

Billing Cycle
 Begin Date 02/18/2019 MON
 End Date 03/17/2019 SUN
 (28 Days) Suspend Billing

Off Rent Date

Print Contract Rental Agree Sent
 Print Pick Sheets Agreement Signed
 Print Prices Off SOS

Fax: 815-439-9933
 Batch Fax

Status Ship Job No. P100012
 Contact WALKER, DAVID
 Comment
 Terms Code 01 Net 30
 Cust PO VERBAL
 Salesperson 0037 Tim Walker

Whse 010 OAK RIDGE, TN
 FOB ORIGIN
 Ship Via WC/ OAK RIDGE
 Delivery Code
 Pickup Code
 Route Number Stop
 Number of Shipping Labels

Contract Taken By TLW Input By TLW

Hold Contract/Billing Future Start
 Awaiting Freight

Quick Print Quick Rate Recalc Accept Cancel Void

✳ When doing Future Starts and Freight holds, you MUST MAKE SURE you select BOTH “Hold Contract/Billing” and either “Future Start” or “Awaiting Freight”. If you do not select “Hold Contract/Billing” it will not hold from billing. The second two are the reason the contract is on hold from any billings.

Customer Ship-To Address Maintenance

Location Code: WCD6
Name: CROSSFIRE LLQ

Address: 1951 OIL MILL RD
Residential Address:

ZIP Code: 79772
City: PECOS State: TX
Country: USA United States
Telephone: Ext: Batch Fax:
E-mail Address:

Contact:
Warehouse: 0023 Pecos TX
Salesperson: Randy McKinley

Sales Tax: AVATAX AvaTax Schedule Exemptions...

Accept Cancel Delete

Customer Ship-To Address Maintenance

Location Code: TEST
Name: TEST LOCATION

Address: 1234 TEST RD
Residential Address:

ZIP Code: 77380
City: 79772 State: TX
Country: USA United States
Telephone: (123)456-7890 Ext: Batch Fax:
E-mail Address:

Contact:
Warehouse: 006 Pecos TX
Salesperson: Randy McKinley

Sales Tax: AVATAX AvaTax Schedule Exemptions...

Accept Cancel Delete

✦ If the customer has a new address they're using frequently, create a new ship to by clicking the blue words "Ship To". Click accept on the window to create a new ship to. Type in caps a 4 letter description for the new location, the name, a good address, the warehouse for the location, salesperson, and make sure the tax schedule says AVATAX. Then click accept to save.