

Reports & Prints (ERS700)

Most Equipment Rental reports give you the option of printing in rental item, alphabetical, vendor or item class order. In addition to the order, you may choose the range to print. For example, if you choose to print in vendor order, you also enter the beginning and ending vendor to print. For the ER reports which do not give you the choice of the order in which to print, you always may choose the beginning and ending range depending on the report. For example, the Contract Listing allows you to select the beginning and ending contract to print whereas the Reservation Report allows you to select the beginning and ending reservation to print. All reports allow you to select the warehouse for which to print.

1. The Equipment Status Report prints the status of each equipment item in the rental cycle. The report shows the number of units stocked for each item and whether it is available for rent, out on rental, in maintenance, or in check-in. This report can be printed by item number (summary) or by equipment number (detail).
2. The Rental History/Usage Analysis provides a report of item usage for the last 12 periods. Information includes number of rentals, usage and units currently stocked. The report can be printed by item number only (summary) or by equipment number (detail).
3. The Contract Listing prints a report of all open and/or closed contracts. The listing can be printed in summary or detail, including exception rates.
4. The Reservation Report prints a listing of all rental reservations. The listing can be printed in summary or detail, including exceptions made to standard item rates.
5. The Revenue Projection Report provides a listing of expected revenues from rental contracts and/or reservations within a user-defined time period.
6. The Delivery/Pickup Report provides a report of delivery and/or pickup schedules. The report is designed to help you plan drivers' delivery routes. You enter the beginning and ending dates to include for scheduling.
7. The Rental Rates List prints a report of all rental items and their rental rates by warehouse.
8. The Equipment Investment Analysis provides a report that can be used to evaluate the profitability of rental items. Some of the report information includes total investment (costs), total income (rentals), profit, and return on investment.
9. The Equipment Transaction Listing prints a list of all transactions posted against each equipment number. Transactions include depreciation, transfers, maintenance, repair, rentals, sales, and disposals.
10. The Rental Item Listing provides a report of all items in rental inventory. The report can be printed in summary (item numbers only) or in detail (equipment number information included).

11. The Maintenance Schedule prints a report of the items due for their next scheduled maintenance. You determine the maintenance cutoff date for which you want to print the schedule.
12. The Late Return Report prints a list of all items that are out on rental past their expected return date.
13. The Rental Customer Listing prints a report of general information on each rental customer. The company name, address, phone numbers, memo, and/or rental history information can be selected to print on the report.
14. The Rental Customer Label Print program prints up to 99 labels per rental customer and may be sorted by zip code.
15. The Inactive Customer Listing provides a list of all rental customers who have not had any rental activity as of a certain number of days that you specify. You can also choose to print the company name, address, phone numbers, memo and/or rental history information. This report is useful in determining which rental customers should receive a sales call or should be deleted from the Rental Customer File.
16. The Lost Rental Report provides a list of items with recorded lost rentals. Lost rentals occur when the item is requested by a customer and is either unavailable for rent or not stocked in rental inventory. You can select a cutoff amount above or below which items will not print. An optional update allows you to remove records after they have been printed.
17. The Kit Listing provides a report of kits created through the Kit Entry and Maintenance Program. Information includes kit number and general information about items assigned to the kit.
18. The Rental Item Balancing Register is only run when the equipment numbers' quantities do not agree with the item number quantities (i.e., very unlikely - if there was a power failure in the middle of an update, etc.). The register prints all out of balance items. The optional update will reset each item's stocked and available quantities equal to the quantities in the Equipment File.
19. The Rental Item Notes Print program prints the notes for any rental items in the Rental Item Notes File. A new page can be printed for each rental item with notes.
20. The ER Code List prints a list of the various ER codes including maintenance/repair codes, warehouses, and special dates.

The following diagram presents the Reports & Prints Menu.

```

                                EQUIPMENT RENTAL
----- REPORTS & PRINTS -----
01-DEMO COMPANY                                ERS700

  1. EQUIPMENT STATUS REPORT
  2. RENTAL HISTORY/USAGE ANALYSIS
  3. CONTRACT LISTING
  4. RESERVATION REPORT
  5. REVENUE PROJECTION
  6. DELIVERY/PICKUP REPORT
  7. RENTAL RATES LIST
  8. EQUIPMENT INVESTMENT ANALYSIS
  9. EQUIPMENT TRANSACTION LISTING
 10. RENTAL ITEM LISTING

 11. MAINTENANCE SCHEDULE
 12. LATE RETURN REPORT
 13. RENTAL CUSTOMER LISTING
 14. RENTAL CUSTOMER LABEL PRINT
 15. INACTIVE CUSTOMER LISTING
 16. LOST RENTAL REPORT
 17. KIT LISTING
 18. RENTAL ITEM BALANCING REGISTER
 19. RENTAL ITEM NOTES PRINT
 20. ER CODE LIST

          SELECTION ____
ENTER SELECTION #, ACCESS CODE, 'OFF', DOWN ARROW, UP ARROW, F4-PREVIOUS MENU

```

Equipment Status Report (ERR710)

Function

This program allows you to print the status of each equipment item in the rental cycle. The report shows the number of units stocked for each item and whether it is available for rent, out on rental, in maintenance, or in check-in.

You have the option to

- choose the print order - item, alpha, vendor, or item class order
- select the beginning and ending order choice
- select items by vendor (or item class) to print

- print item descriptions 1, 2, or both
- select warehouse(s) to print
- print in warehouse or item order
- print summary or detail information.

Report information includes totals for quantities stocked, available, rented, in check-in, or in maintenance. These fields can be printed in

- **summary** - by item number
- **detail** - by equipment number with contract number and return date and time.

The report ends with the total number of items listed.

User Inputs

The following inputs are involved in printing the Equipment Status Report:

1. **Order** (selection)

Indicate whether the report is to print items in order of I (rental item number), A (alpha key), V (vendor), or C (item class). CR defaults to I.

2. **Beginning order choice**

Select the beginning order choice to print (ref. #2).

3. **Ending order choice**

Select the ending order choice to print (ref. #8).

4. **Vendor/Item class**

Enter the vendor (or item class if vendor was selected in input #1) to print. The entry must be a valid vendor (or item class). CR defaults to ALL.

5. Item description

Indicate whether to print **1** (description 1), **2** (description 2), or **B** (both) as set in the IC Item File. CR defaults to 1.

6. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only items assigned to the warehouse in the Rental Item File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

7. Print order

Indicate whether to print items in order of **W** (warehouse) or **I** (item). The system sets this input to **W** if you entered just one code in the **warehouse** input. Otherwise, CR defaults to **W**.

8. Scope

Indicate whether to print **S** (summary information by item number) or **D** (details by item number and equipment number). The system sets this input to **S** if you entered more than one code in the **warehouse** input and entered **I** in the **print order** input. Otherwise, CR defaults to **S**.

9. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Item File (ERITEM), Rental Item Alpha/Warehouse Sort File (ERITAX), IC Vendor File (ICVNDX), or the IC Item Class File (ICCLSX). The ER Equipment File is then checked for the item records meeting the criteria entered.

Files Used : SMCNTL, ICMAS, ERITAX, APVEND, EREQIP, ERITEM, ERITMX, ERMAIN, ERCOIX, ERCONT, ICCLSX, ICVNDX

Files Updated : NONE

The following diagram presents the Equipment Status Report Screen with actual FACTS demo data.

01-DEMO COMPANY	EQUIPMENT STATUS REPORT	ERR710
ORDER I		
BEGINNING ITEM FIRST		
ENDING ITEM LAST		
VENDOR ALL		
ITEM DESCRIPTION 1		
WAREHOUSE 01 ATLANTA WAREHOUSE		
PRINT ORDER W		
SCOPE S		
END OF INPUTS, CR-CONTINUE, F4-BACKUP		

Rental History/Usage Analysis (ERR715)

Function

This program allows you to obtain a report that shows history of rental item usage for the last 12 periods.

You have the option to

- choose the print order - item, alpha, vendor, or item class order
- select the beginning and ending order choice
- select items by vendor (or item class) to print
- print item descriptions 1, 2, or both

- select warehouse(s) to print
- select the beginning and ending period
- print summary or detail history
- print totals only.

Report information includes the following:

- number of rentals
- revenues from rentals
- usage (number of days rented/available rental days)
- units currently stocked.

These fields can be printed in **summary** (by item number only) or in **detail** (by equipment number for each item number). These fields can also be broken out into each period. Summary information gives number of lost rentals.

User Inputs

The following inputs are involved in printing the Rental History/Usage Analysis:

1. **Order**

Indicate whether the report is to print in order of **I** (rental item number), **A** (alpha), **V** (vendor), or **C** (item class). CR defaults to **I**.

2. **Beginning order choice**

Select the beginning order choice to print (ref. #2).

3. **Ending order choice**

Select the ending order choice to print (ref. #8).

4. Vendor/Item class

Enter the vendor (or item class if vendor was selected in input #1) to print. The entry must be a valid vendor (or item class). CR defaults to ALL.

5. Item description

Indicate whether to print 1 (description 1), 2 (description 2), or B (both) as set in the IC Item File. CR defaults to 1.

6. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only items assigned to the warehouse in the Rental Item File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

7. Beginning period

Enter the beginning period (PPYY) to print. CR defaults to OLDEST (12 months ago). F2 defaults to LAST CLOSED (the last ER period closed).

8. Ending period

Enter the ending period (PPYY). The entry must be within 12 periods of the beginning period. CR defaults to LAST CLOSED (the last ER period closed).

9. Scope

Indicate whether to print history in S (summary by item number) or D (detail by equipment number). CR defaults to S.

10. Totals only

Enter Y or N to indicate whether to print only history totals. CR defaults to Y.

11. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Item File (ERITEM), Rental Item Alpha/Warehouse Sort File (ERITAX), IC Vendor File (ICVNDX), or IC Item Class File (ICCLSX). The ER Equipment File is then checked for the item records meeting the criteria entered.

Files Used: SMCNTL, ICMAS, ERITAX, APVEND, ERITEM, EREQIP, ICVNDX, ICCLSX

Files Updated : NONE

The following diagram presents the Rental History/Usage Analysis Screen with actual FACTS demo data.

```
01-DEMO COMPANY          RENTAL HISTORY/USAGE ANALYSIS          ERR715
ORDER I
BEGINNING ITEM FIRST
ENDING ITEM LAST
VENDOR ALL
ITEM DESCRIPTION 1
WAREHOUSE 01 ATLANTA WAREHOUSE
BEGINNING PERIOD OLDEST 09/89 SEP
ENDING PERIOD LAST CLOSED 08/90 AUG
SCOPE S
TOTALS ONLY Y
END OF INPUTS. CR-CONTINUE, F4-BACKUP .
```

Contract Listing (ERR720)

Function

This program allows you to print a listing of all open or invoiced contracts. The listing can be printed in summary or detail. If you print in detail, you have the option to include exceptions made to standard item rates, rental dates and times, all charges (except cleanup), rental periods, prices, quantities billed, and quantities not returnable.

You have the option to

- select the beginning and ending contracts
- select warehouse(s) to print
- select the customer to print
- select the type of contract to print - entered, printed, returned, invoiced
- print information in summary, detail, or detail with rates.

The report includes the following contract information:

- **summary** (for each contract number) - gives the contract status, warehouse, rental date and time, return date and time, contract period, salesperson, customer name, rental revenue, charges (for insurance, delivery, pick up, and clean up), sales revenue, and contract total including tax and freight.
- **detail** - breaks out the above fields for each line item on a contract.
- **detail with rates** - shows all rates and charges for each line item on a contract.

Print the contract listing in detail if you want to see open contracts containing only memo lines, voided lines, unpaid sales lines, or bill-later lines.

User Inputs

The following inputs are involved in printing the Contract Listing:

1. Beginning contract

Enter the beginning contract number to print. CR defaults to FIRST.

2. Ending contract

Enter the ending contract number to print. CR defaults to LAST.

3. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only contracts associated with the warehouse will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

4. Customer

Enter the customer number to print. CR defaults to ALL.

5. Type

Indicate the type of contract to print:

- E - entered
- P - printed
- R - returned
- I - invoiced

CR defaults to ALL.

6. Scope

Indicate whether to print the report in S (summary), D (detail), or R (detail with rates).
CR defaults to S.

7. Exceptions

This input is displayed if you enter D or R in the previous input. Indicate whether to print details with N (no exceptions to standard rate), Y (exceptions), or O (exceptions only). CR defaults to N.

8. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the Rental Contract File (ERCONT) and then checking it for the contract records meeting criteria entered.

Files Used: SMCNTL, ERCONT, ERITEM, ERCUST, ERDATE

Files Updated: SMDIR#

The following diagram presents the Contract Listing Screen with actual FACTS demo data.

01-DEMO COMPANY	CONTRACT LISTING	ERR720
BEGINNING CONTRACT	FIRST	
ENDING CONTRACT	LAST	
WAREHOUSE	01 ATLANTA WAREHOUSE	
CUSTOMER	ALL	
TYPE	ALL	
SCOPE	S	
END OF INPUTS. CR-CONTINUE, F4-BACKUP .		

Reservation Report (ERR725)

Function

This program allows you to print a listing of all rental reservations. The listing can be printed in summary or detail. If you print in detail, you have the option to include exceptions made to standard item rates, rental dates and times, prices, and all charges (except cleanup).

You have the option to

- select the beginning and ending reservations
- select the beginning and ending dates
- select warehouse(s) to print
- select the customer to print
- print information in summary, detail, or detail with rates.

The report includes the following reservation information:

- **summary** (for each reservation number) - gives the reservation status, warehouse, expected rental date and time, expected return date and time, reservation period, salesperson, customer name, rental revenue, charges (for insurance, delivery, pick up, and clean up), sales revenue, and reservation total including tax and freight.
- **detail** - breaks out the above fields for each line item on a reservation.
- **detail with rates** - shows all rates and charges for each line item on a reservation.

User Inputs

The following inputs are involved in printing the Reservation Report:

1. **Beginning reservation**

Enter the beginning reservation number to print. CR defaults to FIRST.

2. **Ending reservation**

Enter the ending reservation number to print. CR defaults to LAST.

3. **Beginning date**

Enter the beginning date to print (ref. #6). Only reservations between the beginning and ending dates are printed. CR defaults to FIRST (that is, the first date with a reservation).

4. **Ending date**

Enter the ending date to print (ref. #6). Only reservations between the beginning and ending dates are printed. CR defaults to LAST (that is, the last date with a reservation).

5. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only reservations associated with the warehouse will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

6. Customer

Enter the customer number to print or enter NEW to print reservations having NEW as the customer number. CR defaults to ALL.

7. Scope

Indicate whether to print the report in S (summary), D (detail), or R (detail with rates). CR defaults to S.

8. Exceptions

This input is displayed if you enter D or R in the previous input. Indicate whether to print details with N (no exceptions to standard rate), Y (exceptions), or O (exceptions only). CR defaults to N.

9. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the Rental Reservation File (ERRESV) and then checking it for the reservation records meeting the criteria entered.

Files Used : SMCNTL, ERRESV, ERITEM, ERCUST, ERDATE

Files Updated : SMDIR#

The following diagram presents the Reservation Report Screen with actual FACTS demo data.

01-DEMO COMPANY	RESERVATION REPORT	ERR725
BEGINNING RESERVATION	FIRST	
ENDING RESERVATION	LAST	
BEGINNING DATE	FIRST	
ENDING DATE	LAST	
WAREHOUSE	01 ATLANTA WAREHOUSE	
CUSTOMER	ALL	
SCOPE	S	
END OF INPUTS. CR-CONTINUE, F4-BACKUP .		

Revenue Projection Report (ERR730)

Function

This program allows you to print expected revenues from rental contracts, reservations, or both within user-defined time periods.

You have the option to

- select the type of projection to print - contract, reservation, or both
- select the warehouse(s) to print
- select the customer to print
- select the number of date groupings
- select the beginning date for each date grouping.

Report information includes the following for each contract and reservation:

- number
- status - entered, printed, returned, invoiced
- warehouse

- return date
- customer number and name
- projected revenue for each time period entered
- total projected revenue.

Totals are given for all contracts and reservations. The report ends with the number of contracts and reservations listed.

User Inputs

The following inputs are involved in printing the Revenue Projection Report:

1. Type

Indicate whether to print **C** (contracts), **R** (reservations), or **B** (both). CR defaults to C.

2. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only contracts or reservations associated with the warehouse will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

3. Customer

Enter the customer number to print. CR defaults to ALL.

4. Groupings

Enter the number of groupings (time periods) to print (2-5). CR defaults to 5.

5. Auto increment

Enter number of days (0-99) for the system to automatically increment the date grouping. If you want to specify the groupings yourself, enter 0. CR defaults to 7.

6. Dates

Enter the beginning date for the first grouping. CR defaults to the system date. After you press CR, the system automatically sets the dates for the remaining groups based on the auto increment. If you entered 0 in input #5, you must enter the beginning date for each grouping.

7. End of inputs

(ref. #7). If you need to change any of the group dates, press F4 from this input.

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Contract File (ERCONT), Rental Reservation File (ERRESV), or both. These files are then checked for the records meeting the criteria entered.

Files Used: SMCNTL, ERCONT, ERRESV, ERCONX, ERRESX, ERCUST, ERDATE

Files Updated: NONE

The following diagram presents the Revenue Projection Screen with actual FACTS demo data.

01-DEMO COMPANY REVENUE PROJECTION REPORT ERR730
TYPE C
WAREHOUSE 01 ATLANTA WAREHOUSE
CUSTOMER ALL
GROUPINGS 5
AUTO INCREMENT 7 DATES 09/20/90 09/27/90 10/04/90 10/11/90 10/18/90

END OF INPUTS. CR-CONTINUE, F4-BACKUP .

Delivery/Pickup Report (ERR735)

Function

This program allows you to print delivery and pickup schedules. This report can help you plan the delivery driver's route.

You have the option to

- select the beginning and ending dates
- select the warehouse(s) to print
- print schedules for contracts, reservations, or both

- print schedules for deliveries, pick ups, or both
- print the delivery and/or pickup instructions
- print line items.

Report information includes the following:

- date and time for each delivery and pick up
- action - pick up or delivery
- type - contract or reservation

- contract number
- warehouse
- customer name, address, and telephone number

- ticket number
- instructions (optional)
- rental items (optional).

The report ends with the number of deliveries and pick ups listed.

User Inputs

The following inputs are involved in printing the Delivery/Pickup Report:

1. Beginning date

Enter the beginning date to print (ref. #6). Only deliveries or pick ups between the beginning and ending dates are printed. CR defaults to FIRST (that is, the first date with a delivery or pick up).

2. Ending date

Enter the ending date to print (ref. #6). Only deliveries or pick ups between the beginning and ending dates are printed. CR defaults to the system date.

3. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only deliveries or pick ups associated with the warehouse will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

4. Type

Indicate whether to print the report for C (contracts) or R (reservations). CR defaults to ALL.

5. Deliveries

Enter Y or N to indicate whether to print delivery schedules. CR defaults to Y.

6. Pickups

Enter Y or N to indicate whether to print pickup schedules. CR defaults to Y.

7. Instructions

Enter Y or N to indicate whether to print delivery and pickup instructions. CR defaults to Y.

8. Scope

Indicate whether to print the report in S (summary) or D (detail with line items). CR defaults to S.

9. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Contract File (ERCONT), Rental Reservation File (ERRESV), or both. The system then checks these files for records meeting the criteria entered.

Files Used : SMCNTL, ERDLPX, ERCONT, ERRESV

Files Updated: SMDIR#

The following diagram presents the Delivery/Pickup Report Screen with actual FACTS demo data.

01-DEMO COMPANY	DELIVERY/PICKUP REPORT	ERR735
BEGINNING DATE	FIRST	
ENDING DATE	SYSTEM DATE	09/20/90
WAREHOUSE	01 ATLANTA WAREHOUSE	
TYPE	ALL	
DELIVERIES	Y	
PICKUPS	Y	
INSTRUCTIONS	Y	
SCOPE	S	
END OF INPUTS. CR-CONTINUE, F4-BACKUP.		

Rental Rates List (ERR740)

Function

This program allows you to print a list of all items and their rental rates by warehouse.

You have the option to

- choose the print order - item, alpha, vendor, or item class order
- select the beginning and ending order choice
- select items by vendor (or item class) to print
- print item descriptions 1, 2, or both
- select warehouse to print.

Report information includes the following for each item printed:

- warehouse number
- item number and description
- unit of measure
- hourly, daily, weekly, and monthly rates
- minimum period to bill
- deposit amount
- insurance, delivery, pickup, and clean-up charges
- charges and free amounts for distance, usage, and fuel.

The report ends with the total number of items listed.

User Inputs

The following inputs are involved in printing the Rental Rates List:

1. **Order**

Indicate whether the report is to print in order of I (rental item number), A (alpha), V (vendor), or C (item class). CR defaults to I.

2. **Beginning order choice**

Select the beginning order choice to print (ref. #2).

3. **Ending order choice**

Select the ending order choice to print (ref. #8).

4. **Vendor/Item class**

Enter the vendor (or item class if vendor was selected in input #1) to print. The entry must be a valid vendor (or item class). CR defaults to ALL.

5. Item description

Indicate whether to print **1** (description 1), **2** (description 2), or **B** (both) as set in the IC Item File. CR defaults to 1.

6. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only items assigned to the warehouse in the Rental Item File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

7. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Item File (ERITEM), Rental Item Alpha/Warehouse Sort File (ERITAX), IC Vendor File (ICVNDX), or IC Item Class File (ICCLSX). The Rental Item File is then checked for the item records meeting the criteria entered.

Files Used: SMCNTL, ICMAS, ERITAX, APVEND, ERITEM, ICVNDX, ICCLSX

Files Updated: NONE

The following diagram presents the Rental Rates List Screen with actual FACTS demo data.

```

01-DEMO COMPANY                RENTAL RATES LIST                ERR740
ORDER I
BEGINNING ITEM FIRST
ENDING ITEM LAST
VENDOR ALL
ITEM DESCRIPTION 1
WAREHOUSE 01 ATLANTA WAREHOUSE

END OF INPUTS. CR-CONTINUE, F4-BACKUP .

```


Equipment Investment Analysis (ERR745)

Function

This program allows you to print a report that can be used to evaluate the profitability of rental items.

You have the option to

- choose print order - item, alpha, vendor, or item class order
- select the beginning and ending order choice
- select items by vendor (or item class) to print

- print item descriptions 1, 2, or both
- select warehouse to print
- print equipment items awaiting removal.

Report information includes the following:

- warehouse
- item number and description
- equipment number
- status
- acquisition date and cost
- depreciation cost
- maintenance cost
- repair cost
- carrying cost
- total investment
- total income from rentals
- profit
- return on investment
- item total

Note that the return on investment is an estimated figure if the item is not disposed. The report gives a warehouse total and a report total for these fields. It ends with the total number of equipment items listed.

User Inputs

The following inputs are involved in printing the Equipment Investment Analysis:

1. Order

Indicate whether the report is to print in order of I (rental item number), A (alpha), V (vendor), or C (item class). CR defaults to I.

2. Beginning order choice

Select the beginning order choice to print (ref. #2).

3. Ending order choice

Select the ending order choice to print (ref. #8).

4. Vendor/Item class

Enter the vendor (or item class if vendor was selected in input #1) to print. The entry must be a valid vendor (or item class). CR defaults to ALL.

5. Item description

Indicate whether to print 1 (description 1), 2 (description 2), or B (both) as set in the IC Item File. CR defaults to 1.

6. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only equipment numbers assigned to the warehouse in the ER Equipment File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

7. Status

Enter Y, N, or O (only) to indicate whether to print equipment items awaiting removal. CR defaults to Y.

8. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Item File (ERITEM), Rental Item Alpha/Warehouse Sort File (ERITAX), IC Vendor File (ICVNDX), or IC Item Class File (ICCLSX). The Rental Equipment File is then checked for the equipment records meeting the criteria entered.

Files Used: SMCNTL, ICMAS, ERITAX, APVEND, EREQIP, ERITEM, ICVNDX, ICCLSX

Files Updated: NONE

The following diagram presents the Equipment Investment Analysis Screen with actual FACTS demo data.

01-DEMO COMPANY	EQUIPMENT INVESTMENT ANALYSIS	ERR745
ORDER I		
BEGINNING ITEM FIRST		
ENDING ITEM LAST		
VENDOR ALL		
ITEM DESCRIPTION 1		
WAREHOUSE 01 ATLANTA WAREHOUSE		
STATUS Y		
END OF INPUTS. CR-CONTINUE, F4-BACKUP .		

Equipment Transaction Listing (ERR750)

Function

This program allows you to print a listing of every transaction against an equipment number, including

- posting of depreciation costs
- transfers
- maintenances
- disposals
- rentals
- sales
- repairs

Note that a reservation is not a transaction.

You have the option to

- choose print order - item, alpha, vendor, or item class order
- select the beginning and ending order choice
- select items by vendor (or item class) to print

- print item descriptions 1, 2, or both
- select warehouse to print
- specify beginning and ending dates
- select the type of transaction to print - rental, sale, depreciation, transfer, maintenance, repair, disposal, or all of these.

Report information includes the following fields by warehouse, item number, and equipment number:

- equipment status
- transaction date
- income from rentals and sales
- expenses from maintenance and repairs
- memo describing a transaction
- transaction type
- units involved in a transaction

This report also shows transactions that have been consolidated with the Transaction Consolidation Register. See the indicated register for the details of these transactions.

User Inputs

The following inputs are involved in printing the Equipment Transaction Listing:

1. Order

Indicate whether the report is to print in order of I (rental item number), A (alpha), V (vendor), or C (item class). CR defaults to I.

2. Beginning order choice

Select the beginning order choice to print (ref. #2).

3. Ending order choice

Select the ending order choice to print (ref. #8).

4. Vendor

Enter the vendor (or item class if vendor was selected in input #1) to print. The entry must be a valid vendor (or item class). CR defaults to ALL.

5. Item description

Indicate whether to print 1 (description 1), 2 (description 2), or B (both) as set in the IC Item File. CR defaults to 1.

6. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only equipment numbers assigned to the warehouse in the ER Equipment File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

7. Beginning date

Enter the beginning date to print. Only transactions occurring between the beginning and ending dates are printed. CR defaults to FIRST (that is, the first date with a transaction).

8. Ending date

Enter the ending date to print. Only transactions occurring between the beginning and ending dates are printed. CR defaults to LAST (that is, the last date with a transaction).

9. Type

Enter up to seven of the following types of information to print, in any combination:

R - rental

S - sale

P - posting of depreciation costs

T - transfer to another rental warehouse, from IC inventory into rental inventory, or out of rental inventory to IC inventory

M - maintenance

X - repair

D - disposal

CR defaults to ALL.

10. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Equipment Transaction File (ERTRAN), Rental Item Alpha/Warehouse Sort File (ERITAX), IC Vendor File (ICVNDX) or IC Item Class File (ICCLSX). The Equipment Transaction File is then checked for the transaction records meeting the criteria entered.

Files Used: SMCNTL, ICMAS, ERITAX, APVEND, EREQIP, ERTRAN, ICVNDX, ICCLSX

Files Updated: NONE

The following diagram presents the Equipment Transaction Listing Screen with actual FACTS demo data.

```
01-DEMO COMPANY                EQUIPMENT TRANSACTION LISTING                ERR750
ORDER I
BEGINNING ITEM FIRST
ENDING ITEM LAST
VENDOR ALL
ITEM DESCRIPTION 1
WAREHOUSE 01 ATLANTA WAREHOUSE
BEGINNING DATE FIRST
ENDING DATE LAST
TYPE ALL

END OF INPUTS. CR-CONTINUE, F4-BACKUP.
```

Rental Item Listing (ERR705)

Function

This program allows you to obtain a listing of items in rental inventory along with specific information regarding these items.

You have the option to

- choose the print order - item, alpha, vendor, or item class order
- select the beginning and ending order choice
- select items by vendor (or item class) to print

- print item descriptions 1, 2, or both
- select warehouse(s) to print
- print contract memos, entry memos, or both
- print item information in summary or detail.

Report information includes the following:

- **summary** (by item number) - warehouse, item number and description, stocking unit of measure, alpha key, vendor, class, commission percentage, carrying cost, taxable status, check-in indicator, item number for posting sales analysis.
- **detail** (by equipment number) - prints the following fields in addition to those for summary: equipment number, location, date acquired, date of last maintenance, initial cost, IC serial number.

You also have the option of printing the contract and entry memos for each item. The report ends with the number of items listed.

User Inputs

The following inputs are involved in printing the Rental Item Listing:

1. Order

Indicate whether the report is to print in order of **I** (rental item number), **A** (alpha), **V** (vendor), or **C** (item class). CR defaults to I.

2. Beginning order choice

Select the beginning order choice to print (ref. #2).

3. Ending order choice

Select the ending order choice to print (ref. #8).

4. Vendor/Item class

Enter the vendor (or item class if vendor was selected in input #1) to print. The entry must be a valid vendor (or item class). CR defaults to ALL.

5. Item description

Indicate whether to print 1 (description 1), 2 (description 2), or B (both) as set in the IC Item File. CR defaults to 1.

6. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only items assigned to the warehouse in the Rental Item File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

7. Include

Enter whether to print C (contract memos), E (entry memos), or both. CR defaults to NONE.

8. Scope

Indicate whether to print the listing in S (summary information by item number) or D (details by item number and equipment number). CR defaults to S.

9. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Item File (ERITEM), Rental Item Alpha/Warehouse Sort File (ERITAX), IC Vendor File (ICVNDX), or IC Item Class File (ICCLSX). The Rental Item File (ERITEM) is then checked for the item records meeting the criteria entered.

Files Used: SMCNTL, ICMAS, ERITAX, APVEND, EREQIP, ERITEM, ICVNDX, ICCLSX

Files Updated: NONE

The following diagram presents the Rental Item Listing Screen with actual FACTS demo data.

01-DEMO COMPANY	RENTAL ITEM LISTING	ERR705
ORDER I		
BEGINNING ITEM FIRST		
ENDING ITEM LAST		
VENDOR ALL		
ITEM DESCRIPTION 1		
WAREHOUSE 01 ATLANTA WAREHOUSE		
INCLUDE NONE		
SCOPE S		
END OF INPUTS. CR-CONTINUE, F4-BACKUP.		

Maintenance Schedule (ERR755)

Function

This program allows you to print the items due for their next scheduled maintenance.

The maintenance schedule for each item is defined in the Rental Item File. The schedule can be based on a specific number of days, a certain measure of distance or usage, or user-defined dates. Items meeting the cutoff criteria that you enter in this program are printed on the Maintenance Schedule. Then, you can use this report to reserve the items for maintenance through the Maintenance/Repair Entry Program.

You have the option to

- choose the print order - item, alpha, vendor, or item class order
- select the beginning and ending order choice
- select items by vendor (or item class) to print

- print item descriptions 1, 2, or both
- select warehouse(s) to print
- select the next maintenance cutoff date
- select the type of maintenance scheduling - manual, number of days, distance, or usage.

Report information includes the following:

- warehouse
- item number and description
- type of maintenance scheduling - manual, number of days, distance, or usage
- standard interval between maintenances

- equipment number
- date of last and next maintenance
- reading of last maintenance and next
- unit of measure for tracking distance or usage.

The report ends with the number of equipment items listed.

User Inputs

The following inputs are involved in printing the Maintenance Schedule:

1. Order

Indicate whether the report is to print in order of **I** (rental item number), **A** (alpha), **V** (vendor), or **C** (item class). CR defaults to I.

2. Beginning order choice

Select the beginning order choice to print (ref. #2).

3. Ending order choice

Select the ending order choice to print (ref. #8).

4. Vendor/Item class

Enter the vendor (or item class if vendor was selected in input #1) to print. The entry must be a valid vendor (or item class). CR defaults to ALL.

5. Item description

Indicate whether to print 1 (description 1), 2 (description 2), or B (both) as set in the IC Item File. CR defaults to 1.

6. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only items assigned to the warehouse in the Rental Item File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

7. Cutoff date

Enter the cutoff date. Items having their next maintenance before this date will be printed. This input is for items that are scheduled manually or by a specific number of days. CR defaults to the system date (ref. #6).

8. Include

Indicate whether to print items scheduled M (manually), # (by a number of days), D (by distance), or U (by usage). CR defaults to ALL.

If you enter D, U, or ALL in this input, you must complete the following two inputs for items scheduled by distance and usage. Otherwise, inputs #9 and #10 are skipped. Items meeting the criteria set in either input 9 or 10 are printed.

9. Cutoff date

Enter the cutoff date for items using distance and usage. Items having their last maintenance before this date will be printed. CR defaults to the system date (ref. #6).

Example: Equipment number I107-2 is scheduled for maintenance based on distance, and the item was last maintained on 3/21/90. If you enter 5/25/90 in this field, the report will include this item since it was last maintained before 5/25.

10. Percent

Enter the percentage (0-100) by which items exceeding their last maintenance usage or distance reading will be printed. CR defaults to 100.

Example: Equipment number I107-2 is scheduled for maintenance every 5000 miles. The last maintenance reading was 46,000 miles, and the current reading is 50,000. It has exceeded its last maintenance reading by 80%, so an entry of 80% or less in this input will include this item on the report.

11. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Item File (ERITEM), Rental Item Alpha/Warehouse Sort File (ERITAX), IC Vendor File (ICVNDX), or IC Item Class File (ICCLSX). ERITEM and the Equipment File (EREQIP) are then checked for the item records meeting the criteria entered.

Files Used: SMCNTL, ERITAX, ICVNDX, ICCLSX, ICMAST, APVEND, EREQIP, ERITEM

Files Updated: NONE

The following diagram presents the Maintenance Schedule Screen with FACTS demo data.

```

01-DEMO COMPANY                MAINTENANCE SCHEDULE                ERR755
ORDER I
BEGINNING ITEM FIRST
ENDING ITEM LAST
VENDOR ALL
ITEM DESCRIPTION 1
WAREHOUSE 01 ATLANTA WAREHOUSE
CUTOFF DATE SYSTEM DATE 09/20/90
INCLUDE ALL  CUTOFF DATE SYSTEM DATE 09/20/90  PERCENT 100%

END OF INPUTS. CR-CONTINUE, F4-BACKUP.

```

Late Return Report (ERR785)

Function

This program allows you to print a list of all items that are past their expected return date and that have not been returned as of the date you enter here. For example, you can specify a date in this program to print items that are a week late instead of just two days late.

You have the option to

- choose the print order - contract or item
- select the beginning and ending order choice
- select the warehouse to print
- select the customer to print
- select expected return date and time.

Report information includes the following:

- contract number
- warehouse
- customer

- rental date and time
- expected return date and time
- item description.

The report ends with the number of contracts listed.

User Inputs

The following inputs are involved in printing the Late Return Report:

1. Order

Indicate whether the report is to print in order of C (contracts) or I (items). CR defaults to C.

2. Beginning order choice

Select the beginning order choice to print (ref. #2).

3 Ending order choice

Select the ending order choice to print (ref. #8).

4. Warehouse

Enter the rental warehouse to print. The entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

5. Customer

Enter the customer number to print. CR defaults to ALL.

6. Date

Enter the expected return date. Items that were **not** returned by this date are printed. CR defaults to the system date.

7. Time

Enter the expected return time for the date (ref. #21). Items that were **not** returned by this time are printed. CR defaults to END OF DAY.

8. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Contract File (ERCONT) or Contract/Item Cross-Reference to ERCONT (ERCOIX). The Rental Contract File is then checked for records meeting criteria entered.

Files Used: SMCNTL, ERCONT, ERCOIX, ICMAS, ERCUST

Files Updated: NONE

The following diagram presents the Late Return Report Screen with actual FACTS demo data.

01-DEMO COMPANY	LATE RETURN REPORT	ERR785
ORDER C		
BEGINNING CONTRACT FIRST		
ENDING CONTRACT LAST		
WAREHOUSE 01 ATLANTA WAREHOUSE		
CUSTOMER ALL		
DATE SYSTEM DATE 09/20/90		
TIME 12:00 AM		
END OF INPUTS. CR-CONTINUE, F4-BACKUP.		

Rental Customer Listing (ERR760)

Function

This program allows you to print a listing of all rental customers defined in the Rental Customer File.

You have the option to

- choose the print order - rental customer, alpha, or AR customer order
- select the beginning and ending order choice
- select warehouse to print
- select customer class to print
- select salesperson to print
- print company name, address, phone numbers, memo, and/or rental history information
- skip up to 9 lines between customers.

Report information includes the following:

- customer number
- company name
- contact name
- address
- phone numbers
- memo
- alpha sort key
- AR customer number
- date account opened
- last rental date
- usual warehouse
- on-hold indicator
- print extension indicator
- override deposit indicator
- rental commission percentage
- life-to-date count and amount of rentals

The report ends with the total number of customers listed.

User Inputs

The following inputs are involved in printing the Rental Customer Listing:

1. Order

Indicate whether the report is to print in order of C (rental customer number), A (alpha), or AR (AR customer number). CR defaults to C.

2. Beginning order choice

Select the beginning order choice to print (ref. #2).

3. Ending order choice

Select the ending order choice to print (ref. #8).

4. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only customers assigned to the warehouse in the Rental Customer File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

5. Customer class

Enter the AR customer class to print. Only customers assigned to the entered class are printed. CR defaults to ALL.

6. Salesperson

Enter the salesperson/territory to print. Only customers assigned to the salesperson/territory entered are printed. CR defaults to ALL.

7. Include

Enter up to five of the following types of information to print, in any combination:

- C - company name
- A - address
- P - phone numbers
- M - memo
- R - rental history

CR defaults to NONE.

8. Skip

Enter the number of lines to skip between customers (0-9). CR defaults to 0.

9. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Customer File (ERCUST), Customer/Alpha Cross-Reference to ERCUST File (ERCUSX), or ER Customer Cross-Reference to ARCUST File (ERCARX). The Rental Customer File is then checked for customers that meet all criteria entered.

Files Used: SMCNTL, ERCUST, ERCUSX, ARCUST, ERCARX

Files Updated: NONE

The following diagram presents the Rental Customer Listing Screen with actual FACTS demo data.

```
01-DEMO COMPANY                RENTAL CUSTOMER LISTING                ERR760
ORDER C
BEGINNING RENTAL CUSTOMER FIRST
ENDING RENTAL CUSTOMER LAST
WAREHOUSE 01 ATLANTA WAREHOUSE
CUSTOMER CLASS ALL
SALESPERSON ALL
INCLUDE NONE
SKIP 0

END OF INPUTS. CR-CONTINUE, F4-BACKUP .
```

Rental Customer Label Print (ERP710)

Function

This program allows you to print labels from the information stored in the Rental Customer File.

You have the option to

- choose the print order - customer or alpha
- select the beginning and ending order choice
- print the labels in zip code order
- print the contact name, company name, or both
- print up to 99 labels for each customer
- select warehouse to print
- print an alignment check.

Information on labels includes the following: customer name, address, city, state, zip code, and company name. The program prints on 11-1/2 by 15 inch paper and prints four labels across. For more information on the size of the labels, see the forms section of the *Installation Guide*.

User Inputs

The following inputs are involved in printing rental customer labels:

1. **Order**

Indicate whether the report is to print in order of C (rental customer number) or A (alpha). CR defaults to C.

2. **Beginning order choice**

Select the beginning order choice to print (ref. #2).

3. **Ending order choice**

Select the ending order choice to print (ref. #8).

4. **Zip code sort**

Enter N or Y to indicate whether to sort the customers by zip code. CR defaults to N.

5. **Customer/company**

Indicate whether to print on all labels CU (customer name), CO (company name), or B (both). CR defaults to CUSTOMER.

6. **# labels**

Enter the number of labels to print per customer (1-99). CR defaults to 1.

7. Warehouse

Enter the rental warehouse to print. Only customers assigned to the warehouse in the Rental Customer File will print. The entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

8. Alignment

Enter N or Y to indicate whether to print an alignment (ref. #1). CR defaults to N.

9. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Customer File (ERCUST) or Customer/Alpha Cross-Reference to ERCUST File (ERCUSX). The Rental Customer File is then checked for the information needed to print labels. If sorted by zip code, the program creates a temporary sort file (SMSRT#), which sorts the zip codes into correct order.

Files Used: SMCNTL, ERCUST, ERCUSX

Files Updated: SMSRT#

The following diagram presents the Rental Customer Label Print Screen with FACTS demo data.

```
01-DEMO COMPANY                RENTAL CUSTOMER LABEL PRINT                ERP710
ORDER C
BEGINNING CUSTOMER FIRST
ENDING CUSTOMER LAST
ZIP CODE SORT N
CUSTOMER/COMPANY CUSTOMER
# LABELS 1
WAREHOUSE 01 ATLANTA WAREHOUSE
ALIGNMENT N

END OF INPUTS. CR-CONTINUE, F4-BACKUP.
```

Inactive Customer Listing (ERR795)

Function

This program allows you to print a listing of customers who have been inactive (have not rented or purchased any items through ER) for a user-defined time period. This program uses the information stored in the Rental Customer File. The optional update removes customers from this file if they do not have outstanding reservations, contracts, or invoices.

You have the option to

- choose the print order - customer or alpha
- select the beginning and ending order choice
- select warehouse to print
- print company name, address, phone numbers, memo, and/or rental history information
- select the number of days since last activity.

Report information includes

- customer number
- customer name
- AR customer number
- warehouse
- date opened
- date of last rental
- life-to-date count and amount of rentals.

The report prints an asterisk by each customer that can be removed. It ends with the total number of customers listed.

User Inputs

The following inputs are involved in printing an Inactive Customer Listing:

1. Order

Indicate whether the report is to print in order of **C** (rental customer number), **A** (alpha), or **AR** (Accounts Receivable customer number). CR defaults to C.

2. Beginning order choice

Select the beginning order choice to print (ref. #2).

3. Ending order choice

Select the ending order choice to print (ref. #8).

4. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only customers assigned to the warehouse in the Rental Customer File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

5. Include

Enter up to four of the following types of information to print, in any combination:

- C - company name
- A - address
- P - phone numbers
- M - memo

CR defaults to NONE.

6. # days inactive

Enter the number of days (0-999) before the system date to check for activity (last invoice). The system converts the entry to a date and prints those customers without activity since that date. CR defaults to 0 (system date).

7. End of inputs

(ref. #7)

8. Check the listing. OK to remove customers with asterisks?

Verify the listing. Enter YES or N to indicate whether to remove the records printed with asterisks.

Summary of File Activity

Printing proceeds by reading through the selected file - Rental Customer File (ERCUST), Customer/Alpha Cross-Reference to ERCUST File (ERCUSX), or ER Customer Cross-Reference to AR Customer File (ERCARX). The system then checks the Rental Customer File for customers that meet all criteria entered. If you choose to delete records, they are deleted from the Rental Customer File, Customer/Alpha Cross-Reference to ERCUST File, Customer by Phone Cross-Reference to ERCUST File (ERPHOX), and ER Customer Cross-Reference to AR Customer File. An asterisk is **not** printed by a customer if they have information in any of these three files: Contract/Customer Cross-Reference to ERCONT File (ERCONX), Reservation/Customer Cross-Reference to ERRESV File (ERRESX), and Past Invoice by Customer Cross-Reference File (ERPASX).

Files Used: SMCNTL, ERCONX, ERRESX, ERPASX, ARCUST

Files Updated : SMSRT#, ERCUST, ERCUSX, ERCARX, ERPHOX

The following diagram presents the Inactive Customer Listing Screen with actual FACTS demo data.

```
01-DEMO COMPANY                INACTIVE CUSTOMER LISTING                ERR795
ORDER C
BEGINNING CUSTOMER FIRST
ENDING CUSTOMER LAST
WAREHOUSE 01 ATLANTA WAREHOUSE
INCLUDE NONE
# DAYS INACTIVE 0 09/20/90

END OF INPUTS. CR-CONTINUE, F4-BACKUP.
```

Lost Rental Report (ERR765)

Function

This program allows you to print items with recorded lost rentals. A lost rental is an item that is requested by a customer but is unavailable for rent or not stocked in rental inventory. They are recorded through reservation or contract entry. The optional update in this program removes the printed records from the ER System.

Report information includes the following by warehouse:

- item number and description
- unit of measure
- number of requests
- estimated dollars lost
- date of last request.

The report gives totals for each warehouse, all warehouses, and all items listed.

User Inputs

The following inputs are involved in printing the Lost Rental Report:

1. Beginning item

Enter the beginning item to print. Entering a valid item displays its description. CR defaults to FIRST.

2. Ending item

Enter the ending item to print. Entering a valid item displays its description. CR defaults to LAST.

3. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only items assigned to the warehouse in the Rental Item File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

4. Include dates

Enter one of the following values to indicate which dates to print:

ALL - items for all request dates

B - items having requests on or before the entered date. When you enter this value, the system displays the input **on or before**, so you can specify the date (ref. #6).

- A - items having requests on or after the entered date. When you enter this value, the system displays the input **on or after**, so you can specify the date (ref. #6).

CR defaults to ALL.

5. Include dollar amounts

Enter one of the following values to indicate which dollar amounts to print:

ALL - items for all lost rental amounts

- A - items having estimated lost rental amounts equal to or above the entered amount. When you enter this value, the system displays the input **equal or above**, so you can specify the amount.

- B - items having estimated lost rental amounts equal to or below the entered amount. When you enter this value, the system displays the input **equal or below**, so you can specify the amount.

6. End of inputs

(ref. #7)

7. Check the report. OK to remove records just printed?

Verify the report. Enter YES or N to indicate whether to remove the records just printed.

Summary of File Activity

Printing proceeds by reading through the Lost Rental File (ERLOST) and checking for records meeting criteria entered. Printed records are removed from the Lost Rental File (ERLOST).

Files Used: SMCNTL, ICMAS

Files Updated: ERLOST, SMSRT#

The following diagram presents the Lost Rental Report Screen with actual FACTS demo data.

01-DEMO COMPANY	LOST RENTAL REPORT	ERR765
BEGINNING ITEM FIRST		
ENDING ITEM LAST		
WAREHOUSE 01 ATLANTA WAREHOUSE		
INCLUDE DATES ALL		
INCLUDE DOLLAR AMOUNTS ALL		
END OF INPUTS. CR-CONTINUE, F4-BACKUP.		

Equipment Rental Kit Listing (ERR770)

Function

This program allows you to print a listing of each of the kits created through the Kit Entry and Maintenance Program.

Report information includes

- kit number
- type of item - rental or sales
- description of each item in the kit:
 - number of units
 - units of measure
 - percent of standard rental rate or sales price used
 - rental rate for each item - hourly, daily, weekly, monthly
 - selling price for each item - price, unit of measure, extension
- total rental and sales rates for the kit.

The report ends with the total number of kits listed.

User Inputs

The following inputs are involved in printing the Equipment Rental Kit Listing:

1. **Beginning kit**

Enter the beginning kit number to print. CR defaults to FIRST.

2. **Ending kit**

Enter the ending kit number to print. CR defaults to LAST.

3. **Warehouse**

Enter the warehouse for which to print rental rates. The entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal.

4. **End of inputs**

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the ER Kit File (ERKITS) and checking for records meeting the criteria entered.

Files Used: SMCNTL, ERKITS, ERITEM, ICMAS

Files Updated: NONE

The following diagram presents the Equipment Rental Kit Listing Screen with actual FACTS demo data.

01-DEMO COMPANY	EQUIPMENT RENTAL KIT LISTING	ERR770
BEGINNING KIT FIRST		
ENDING KIT LAST		
WAREHOUSE 01 ATLANTA WAREHOUSE		
END OF INPUTS. CR-CONTINUE, F4-BACKUP.		

Rental Item Balancing Register (ERR775)

Function

This program allows you to print a register of all out-of-balance rental items. You use this program if the stocked and available quantities for an item in the Rental Item File do not equal its quantities in the Equipment File. It is also used if the quantities in the Equipment File do not match the information in the Contract File and Maintenance/Repair Expense File. These situations may happen if a user escapes from a register update or if a power failure or surge has occurred. The optional update resets each item's stocked and available quantities equal to the quantities in the Equipment File.

You have the option to

- select the beginning and ending item
- select the warehouse(s) to reset.

Report information includes the following:

- warehouse
- item number and description
- stocked and available quantities for
 - new (updated and balanced)
 - current (out of balance)
 - difference between new and current.

The report ends with the number of items listed.

User Inputs

The following inputs are involved in resetting stocked and available quantities:

1. Beginning item

Enter the beginning item to reset. CR defaults to FIRST.

2. Ending item

Enter the ending item to reset. CR defaults to LAST.

3. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only items assigned to the warehouse in the Equipment File will be reset. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

4. End of inputs

(ref. #7)

The Rental Item Balancing Register is printed, and the following prompt is then displayed.

5. Check the register. OK to update?

After the register is printed, verify the printout. If everything is correct, enter YES to continue. The program proceeds with the update. If there is a correction to be made, enter N to exit the program. After the correction is made, you can begin the entire register process again.

Summary of File Activity

The program reads through the Contract File (ERCONT) and the Maintenance/Repair Expenses File (ERMAIN) to see the number of an item that is unavailable for rent. The program compares this information to the quantity currently rented in the Equipment File (EREQIP). Then, it compares the total quantity stocked and available to the Rental Item File (ERITEM). The register updates the Rental Item File and the Equipment File based on these calculated values. The last item balancing register number is updated in the control file (SMCNTL).

Files Used: ICMAS, ERCOIX, ERCONT, ERMAIN

Files Updated: SMCNTL, ERITEM, EREQIP, SMSRT#

The following diagram presents the Rental Item Balancing Register Screen with actual FACTS demo data.

```
01-DEMO COMPANY                RENTAL ITEM BALANCING REGISTER                ERR775

THIS PROGRAM WILL PRINT A REGISTER OF ALL OUT-OF-BALANCE RENTAL ITEMS.
THE OPTIONAL UPDATE WILL RESET EACH ITEM'S STOCKED AND AVAILABLE QUANTITIES
EQUAL TO THE TOTAL OF THE EQUIPMENT FILE QUANTITIES FOR THAT ITEM.

BEGINNING ITEM FIRST

ENDING ITEM LAST

WAREHOUSE 01 ATLANTA WAREHOUSE

END OF INPUTS. ENTER 'YES' TO CONTINUE, F4-BACKUP ...
```

Rental Item Notes Print (ERR780)

Function

This program allows you to print the notes recorded for each item. Item notes are created and maintained through the Equipment Inquiry Program.

You have the option to

- choose the print order - item, alpha, vendor, or item class order
- select the beginning and ending order choice
- print a new page for each item
- print item descriptions 1, 2, or both
- select warehouse to print.

Report information includes item number, item description, and all notes recorded. The report can be printed on 80-column paper, and each item can begin on a new page. The report ends with the total number of items listed.

User Inputs

The following inputs are involved in printing item notes:

1. **Order**

Indicate whether the report is to print in order of **I** (rental item number), **A** (alpha), **V** (vendor), or **C** (item class). CR defaults to **I**.

2. **Beginning order choice**

Select the beginning order choice to print (ref. #2).

3. **Ending order choice**

Select the ending order choice to print (ref. #8).

4. **New page**

Enter **N** or **Y** to indicate whether to begin each item's notes on a new page. CR defaults to **N**.

5. **Item description**

Indicate whether to print **1** (description 1), **2** (description 2), or **B** (both) as set in the IC Item File. CR defaults to **1**.

6. Warehouse

Enter the warehouse to print. The entry must be a valid ER warehouse code as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

7. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Rental Item File (ERITEM), IC Alpha File (ICALPX), AP Vendor File (APVEND), or IC Item Class File (ICCLSX). The Rental Item Notes File is then checked for items meeting criteria entered.

Files Used: SMCNTL, ICMAST, ICALPX, APVEND, ERNOTE, ERITEM, ERITAX, ICVNDX, ICCLSX

Files Updated: NONE

The following diagram presents the Rental Item Notes Print Screen with actual FACTS demo data.

```
01-DEMO COMPANY          RENTAL ITEM NOTES PRINT          ERR780
ORDER I
BEGINNING ITEM FIRST
ENDING ITEM LAST
NEW PAGE N
ITEM DESCRIPTION 1
WAREHOUSE 01 ATLANTA WAREHOUSE

MAY PRINT ON 80 COLUMN PAPER. END OF INPUTS. CR-CONTINUE, F4-BACKUP.
```

ER Code List (ERR790)

Function

This program allows you to print a listing of each of the following:

- maintenance/repair codes
- warehouse codes
- special dates.

Each code is entered into its own file maintenance program.

You have the option to

- select the code to print
- select the beginning and ending code.

Report information varies with the code you select to print as shown in the following table.

IF you are printing ...	THEN the report contains the following information ...
maintenance/repair codes	code, description, type and GL number. This option can print on 80-column paper.
warehouse codes	code, description, opening and closing times, overnight charge indicator, tax information, K cost, and default city, state, and zip code.
special dates	date, opening time, closing time, overnight charge indicator, and memo for each date entered. This option can print on 80-column paper.

Each type of report ends with the total number of codes listed.

User Inputs

The following inputs are involved in printing the ER Code List:

1. Select number

Indicate whether to print **1** (maintenance/repair codes), **2** (warehouse codes), or **3** (special dates).

2. Beginning selection choice

Select the beginning choice of the code selected to print (ref. #2). CR defaults to **FIRST**.

3. Ending order choice

Select the ending choice of the code selected to print (ref. #8). CR defaults to LAST.

4. End of inputs

(ref. #7)

Summary of File Activity

Printing proceeds by reading through the chosen file - Special Date File (ERDATE) or SMCNTL. These files are then checked for records meeting the criteria entered.

Files Used: SMCNTL, ERDATE

Files Updated: NONE

The following diagram presents the ER Code List Screen with actual FACTS demo data.

01-DEMO COMPANY	ER CODE LIST	ERR790
1 MAINTENANCE/REPAIR CODE		
2 WAREHOUSE		
3 SPECIAL DATE		
SELECT # OF INFORMATION TO BE PRINTED, F4-END ..		

