Chapter 3.15: Equipment Selling

Overview

This chapter will teach you how to properly set up and track sold equipment within Route Manager. This is a streamlined process that will allow you to sell both new and used equipment to your customers. The basic outline to this chapter is:

1. Equipment Selling Setup
2. Daily Processing

Follow the steps in order to successfully "sell" equipment within Route Manager.

Equipment Selling Setup

This section walks you through setting up the items required for equipment selling.
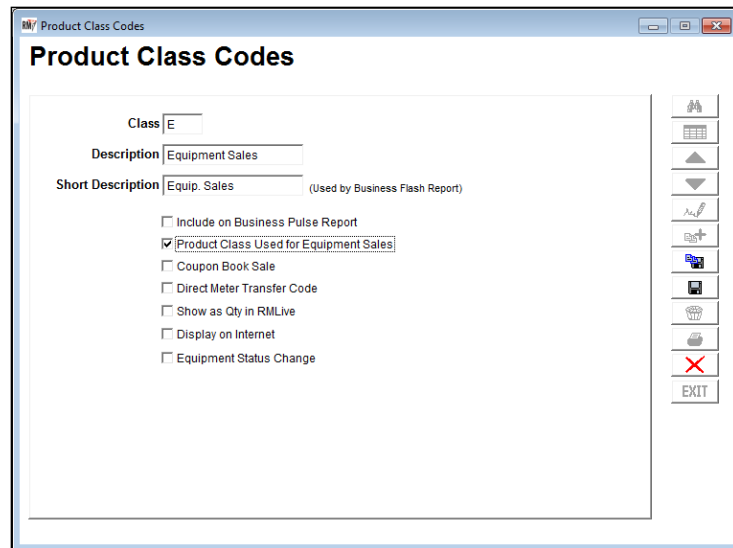
New Product Class Codes

A new Product Class Code will need to be created in order to use the equipment selling option.

1. Browse to *Lists > Product Codes > Product Class Codes*.
2. Choose the *Add* button.
3. Enter a Class ID, Description, and Short Description.

NOTE: Do not use or create Product Classes 0, 1, 4, 5, 7, 9, or * when setting up the new class as these are reserved for specific functions already.

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4. Select the option "Product Class Used for Equipment Sales".
5. Click *Save* to complete the process.

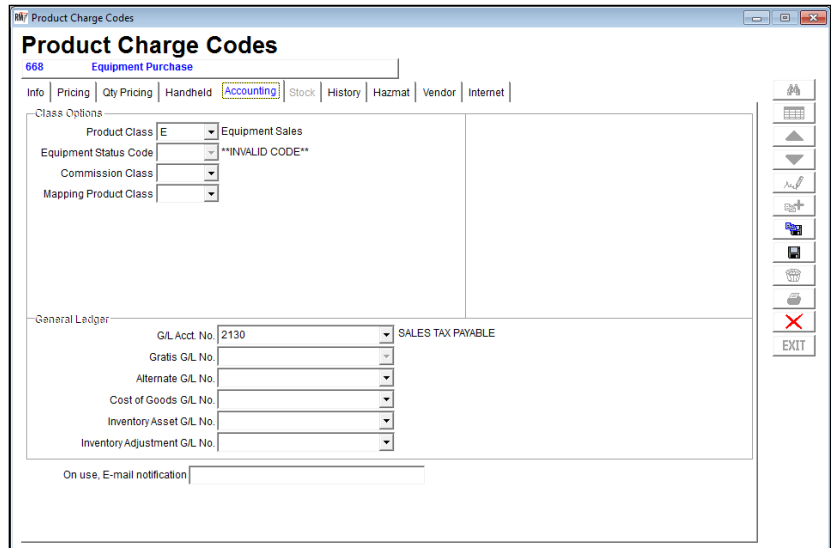The new Product Class should look similar to the following screen:

New Product Charge Code

At least one Product Charge Code has to be created and assigned to the new Product Class created in the previous section. This code will be used when a piece of equipment is sold to a customer.

1. Browse to *Lists > Product Codes > Product Charge Codes.*

2. Choose the *Add* button.

3. On the *Info* tab, enter an available *Product Code ID* and *Description*.

4. On the *Pricing* tab, enter the standard price for sold equipment (leave it at 0.00 if it always changes) and select a tax category.

5. On the *Handheld* tab, select the *Handheld Product* option.

6. On the *Accounting* tab, assign the product to the new *Product Class* created in the previous section, and select a *G/L* number for the item.

7. Click *Save*.

An example of a new code created for equipment purchases is displayed below:

Daily Processing

This section walks you through the correct procedure to follow when selling a piece of equipment.

Selling Equipment - Invoices and Adjustments Entry

To sell a piece of equipment to your customer, create an Invoice on the desktop.

1. Browse to the *Invoices and Adjustments* screen.

2. Click *Add*.

3. Enter or browse for your customer's account number.

4. Enter an *Invoice Number*.

5. From the *Add Product* section, choose your new *Equipment Sales* code, enter a *Quantity* of 1, and update the *Price* if necessary.

6. You are now required to enter the Serial Number for the equipment the customer is purchasing, click on the drop-down list and select the correct item (installed or warehouse items can be selected):

NOTE: The installed equipment is displayed above the dotted line in the example. The program will do this automatically.

7. *Save* the Invoice to complete the entry process.

Once the invoice is posted, the equipment will be updated to reflect the sale and ownership by the customer.

NOTE: The customer will not be billed for any future rentals on this piece of equipment after the invoice has been posted.

EXAMPLES - AFTER EQUIPMENT IS SOLD

Customer Information > Equipment

Reflects Rental Frequency Code 3, is assigned the *Equipment Selling Code* (668), and the *Sale* price is now displayed in the *Rent* field.

Equip. ID	Type	Style	Frq	Code	Rent	Installed	Status
0128	CROCK	Blue Stripe	3	668	150.00	06/11/2015	
0117	CROCK	Blue Stripe	M	401	24.99	06/11/2015	M
0136	CROCK	Blue Stripe	5	401	24.99	06/11/2015	M

Equipment Master List

Now displays "Customer Owned" and associated sales data.

Customer Owned

99 DEFAULT
06/01/2006   Sold Price   150.00
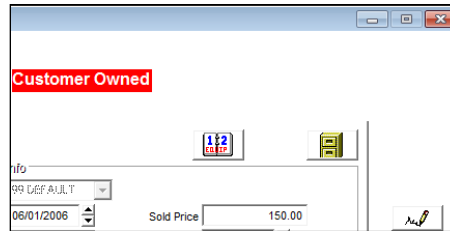
Selling Equipment - Delivery Order Entry

You can use the Delivery Order screen to schedule a piece of equipment to be installed and sold on a route delivery.

1. Create a new *Delivery Order*

2. Click on the white-box in the *Equipment* section of the screen to activate the "Order Equipment" option.

Qty.	Action	Serial No.	Type	Style	Location
No Items					

3. Choose the *Install* button.

Serial No.	Type	Style	Location	Last Service	Next Service	Service Code
0117	CROCK	Blue Stripe		/ /	06/22/2015	Preventative Maintenance
0128	CROCK	Blue Stripe		/ /	/ /	
0136	CROCK	Blue Stripe		/ /	/ /	

Install   Exchange   Service   Repair   Pickup   Reserve

Qty.	Type	Style	Location	Freq.	Chrg. Code	Period Rate New
0	CROCK	Blue Stripe		M	401	24.99

✓OK   ✕

4. Enter the *Quantity* (to install), *Type*, and *Style* of equipment to sell to the customer.

5. Under the *Freq.* field, scroll to "3: Sold Equipment".

6. In the *Chrg. Code* field, select the "Equipment Purchase" code that you would like to use for this transaction and update the *Period Rate* to reflect the amount to bill the customer for the sale.

7. Select the "New" option if you would like the delivery driver to sell the customer a new piece of equipment from inventory.

8. Fill in the remaining items required for the Delivery Order.

9. The Delivery Order should resemble the following:

Notice that the *Orders* section of the *Delivery Order* reflects the *Equipment Purchase Code* setup in *Step 6* on the previous page. This will automatically be added to the customer's invoice at the time of delivery.

Continue to the next section to view the impact this option will have on the handheld.

Equipment Selling – On the Handheld

To accommodate the sale of equipment on the handheld, there are a couple of options available for your delivery drivers.

NOTE: This feature is not available yet on the Mango Mobile (Android) Handheld.

Processing an Order

If equipment has been set up to be sold on this account from the *Delivery Order* screen the delivery driver will be prompted to carry-out the activity scheduled.

1. The Driver is prompted for the install when the invoice is selected.
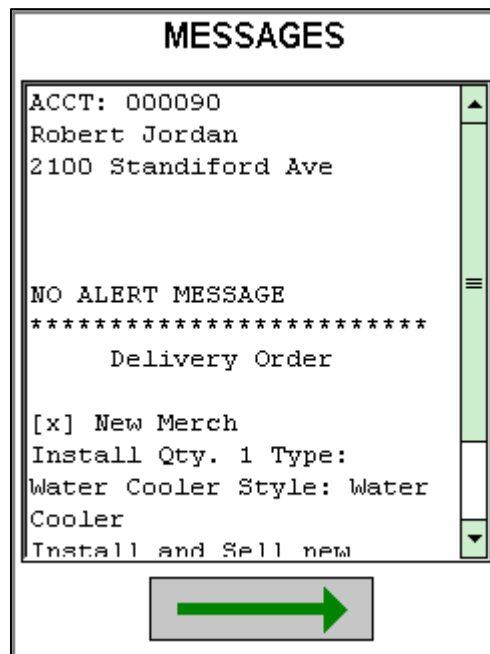
The *Equipment Purchase* product is automatically displayed at the purchase price on the invoice.

2. Clicking the **Continue** button on the invoice will prompt the driver to choose the piece of equipment to sell to the customer.

NOTE: The driver can choose to sell the installed equipment if necessary.

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3. Tap on a piece of equipment and choose the *Sell* button to complete the process.

Selling Equipment Manually on the Handheld

The delivery driver has the ability to manually sell a piece of equipment from the Misc. Items screen on the handheld.

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1. Select the *Misc. Items* option.
2. Choose the *Add* option.
3. Select an *Equipment Purchase Product*.

4. Enter a quantity of 1 and update the price (if necessary).

Miscellaneous Item Pricing:
666   Equipment Purcha

No Par Data

Quantity	Price	Total
1	150.00	150.00

4. Clicking the *Continue* button on the screen will prompt the driver to choose the piece of equipment to sell to the customer.

SELL EQUIPMENT
Customer

Serial Number	Type	
920101120	X-90	
920104120	X-90	
EQUIP1234	Cook/Cold	

Truck

Serial Number	Type	
999999ABCD	Cook/Cold	

EXIT   SELL

NOTE: The driver can choose to sell the installed equipment if necessary.

5. Tap on a piece of equipment and choose the *Sell* button to complete the process.

Summary

Equipment Selling is a simple to use feature that increases the flexibility of the Route Manager program. If you require assistance with this option, please contact Advantage Route Systems.

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