

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

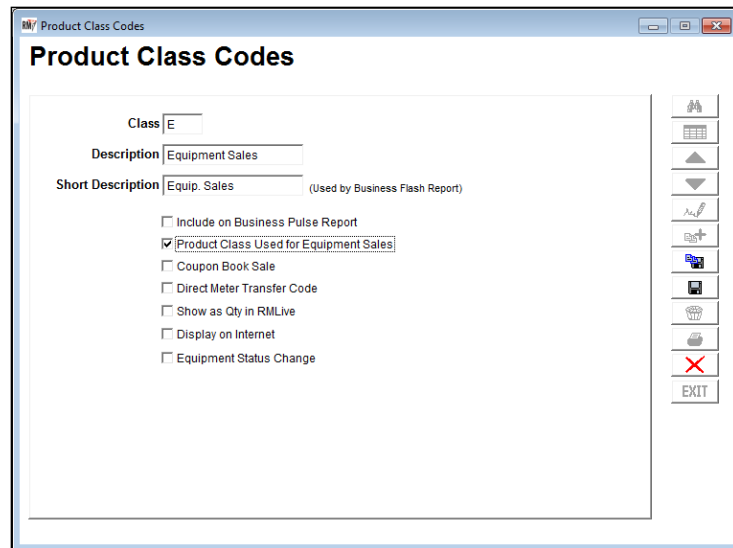
A new Product Class Code will need to be created in order to use the equipment selling option.

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.

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:



Product Class Codes

Class: E

Description: Equipment Sales

Short Description: Equip. Sales (Used by Business Flash Report)

Include on Business Pulse Report

Product Class Used for Equipment Sales

Coupon Book Sale

Direct Meter Transfer Code

Show as Qty in RMLive

Display on Internet

Equipment Status Change

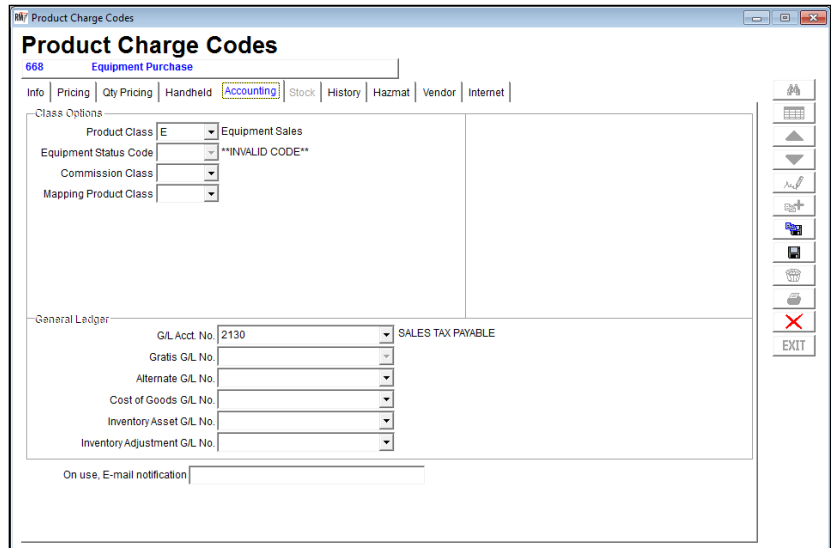
EXIT

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:



The screenshot shows a software window titled "Product Charge Codes" with a sub-header "668 Equipment Purchase". The window has several tabs: Info, Pricing, Qty Pricing, Handheld, Accounting (selected), Stock, History, Hazmat, Vendor, and Internet. The "Accounting" tab is active, showing the following fields:

- Class Options:**
 - Product Class: E (dropdown) Equipment Sales
 - Equipment Status Code: **INVALID CODE** (dropdown)
 - Commission Class: (dropdown)
 - Mapping Product Class: (dropdown)
- General Ledger:**
 - G/L Acct. No.: 2130 (dropdown) SALES TAX PAYABLE
 - Gratis G/L No.: (dropdown)
 - Alternate G/L No.: (dropdown)
 - Cost of Goods G/L No.: (dropdown)
 - Inventory Asset G/L No.: (dropdown)
 - Inventory Adjustment G/L No.: (dropdown)
- On use, E-mail notification: (text input field)

On the right side of the window, there is a vertical toolbar with icons for grid, up/down arrows, search, print, and an EXIT button.

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.

Chrg. Code	Description	Qty	Price	Total	Tax
		1	0.00	0.00	0.0000
Last Entered		Serial / Batch Code	PO #		
100	10 Pound Bags Of1	0	1.25	0.00	0.0000

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):

Chrg. Code	Description	Qty	Price	Total	Tax
415	Cooler	0	10.00	0.00	0.0000
Last Entered		Serial / Batch Code	PO #		
100	10 Pound Bags Of1	0	1.25	0.00	0.0000

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

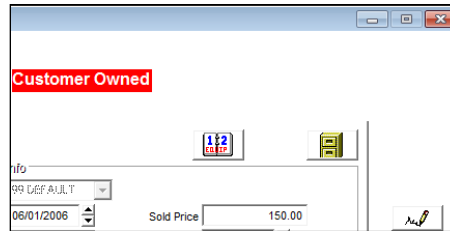
Customer Information > Equipment

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	M
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.



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.

Equipment Qty	Action	Serial No.	Type	Style	Location
No Items					

3. Choose the *Install* button.



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

Qty.	Type	Style	Location
1	COOK/COLD	Blue Stripe	Store Room

- Under the *Freq.* field, scroll to “3: Sold Equipment”.

3	Sold Equipment
4	Trial Equipment
5	Rental Groups
6	Tri-Annual Month 1
7	Tri-Annual Month 2
8	Tri-Annual Month 3
9	Tri-Annual Month 4
+	Deposit Equipment
=	Lease Equipment
@	Rent Schedule 3
#	Rent Schedule 4
%	Daily

- 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.

Freq.	Chrg. Code	Period Rate New
3	668	0.00 <input type="checkbox"/>

668 | Equipment Purchase

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

Period Rate New
150.00 <input checked="" type="checkbox"/>

- Fill in the remaining items required for the Delivery Order.
- The Delivery Order should resemble the following:

Equipment Selling – On the Handheld

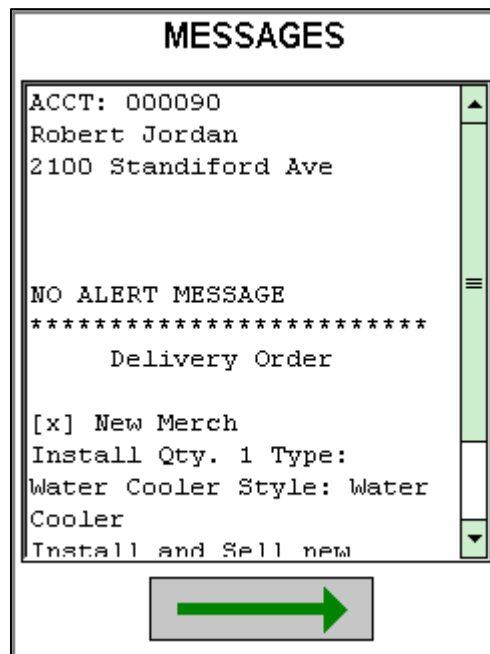
To accommodate the sale of equipment on the handheld, there are a couple of options available for your delivery drivers.

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.

Robert Jordan
2100 Standiford Ave

Equipment Pur	@	150.00	▲
No Par Data		1	▼
Line Total:		150.00	+
B - Past Due			
5 Gallon Returned	17	0	▼
Rents:		10.00	
Deposits:		0.00	
Default Products:		150.00	
Misc. Items:		0.00	
Tax		24.00	
Invoice Total:		184.00	
Payment Recvd:		0.00	
Account Balance:		-382.16	

EXIT E N H I [Home] [Right Arrow]

- Clicking the **Continue** button on the invoice 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.

- 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.


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

- 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

7	8	9	←
4	5	6	→
1	2	3	+→
X	0	Grat	CLR 

- 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.

- 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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Series 7: Version Date, May 24, 2016