

4.10 Handheld Lease Agreements

Introduction

The *Handheld Lease Agreement* feature gives you the ability to establish new equipment lease agreements right from the handheld. The agreement details are set up on the desktop and available on the handheld with each delivery. As equipment is installed on an account, the customer will sign the new lease agreement and the information will be permanently stored on each account.

Note: Handheld Lease Agreements are only supported on Windows CE handhelds (Not on Android).

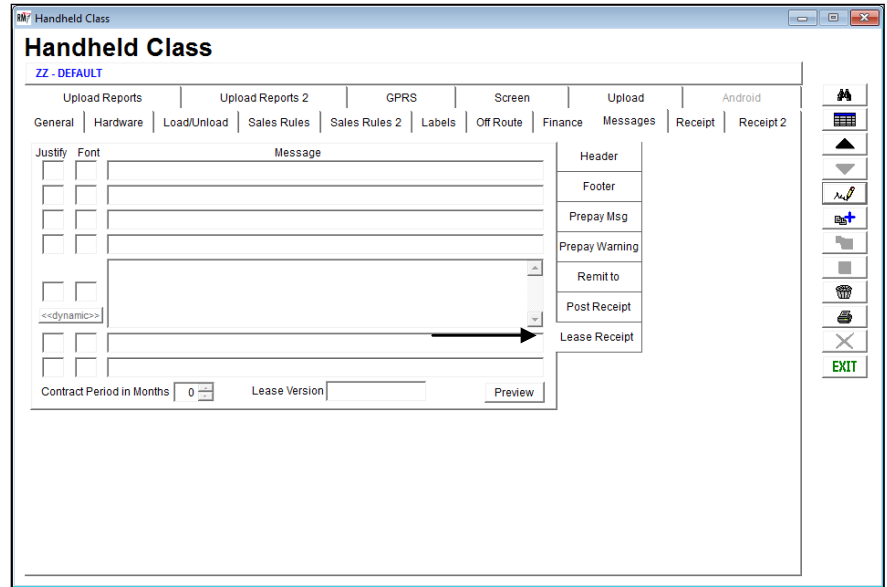
Setup

In order to successfully set up the *Handheld Lease Agreement* feature, you will need to modify each *Handheld Class*. Each item is defined within this section.

Lease Receipt Setup

The *Lease Agreement Receipt* will be generated and printed from the handheld. This information can be established within the *Handheld Class* screen. The agreement can be formatted to suit your needs.

Browse to *Lists > Routes > Handheld Class > Messages* tab and choose the Lease Receipt option.



The screenshot shows the 'Handheld Class' window with the 'Messages' tab selected. The 'Lease Receipt' option is highlighted in the right-hand menu. The main area contains a 'Message' field with a text area and a 'Preview' button. Below the message field are 'Contract Period in Months' (set to 0) and 'Lease Version' fields.

First, enter the header message that you would like to print on the agreement.

Justify	Font	Message
C	A	TURLOCK BOTTLED WATER
C	A	147 S BROADWAY
C	A	TURLOCK, CA 95380
C	A	209-632-1122

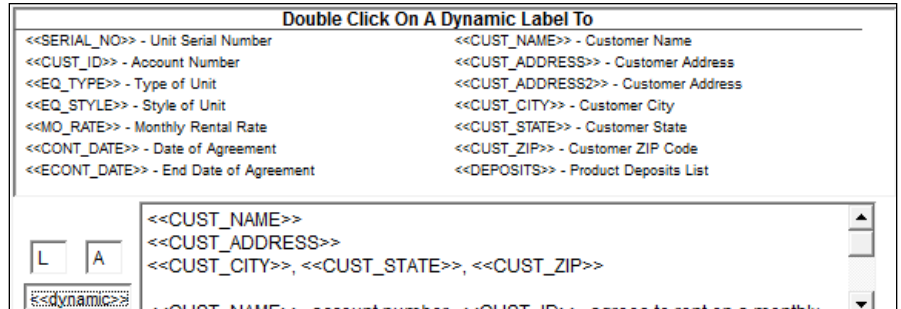
NOTE: The *Justify* and *Font* field fields are identical to the standard *Header* and *Footer* options. Refer to the 'Printer Font' section of the *Handheld User Guide* for examples.

Next, you will enter the text that you would like to appear in the body of the agreement.

Justify	Font	Message
L	A	<<CUST_NAME>> <<CUST_ADDRESS>> <<CUST_CITY>>, <<CUST_STATE>>, <<CUST_ZIP>>
<<dynamic>>		<<CUST_NAME>> account number <<CUST_ID>> agree to rent on a monthly

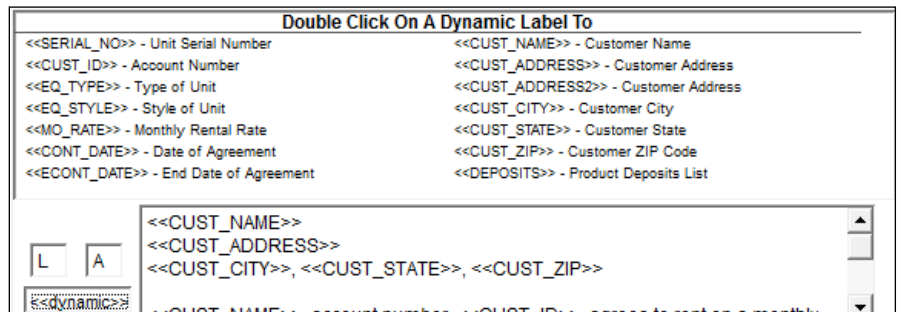
You can add dynamic information to the message by clicking the **Dynamic** button on the screen. This will display all of the available field options.

A definition of each field is displayed next to the field name.

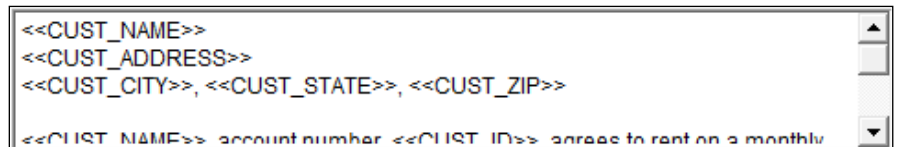


To add a dynamic field to the message, click the section of the message you would like to insert the field into, and double-click on the field that you would like to use.

In the example below, the user double-clicked on *Customer Name* to insert the field into the message.



Complete the message by using as many of the dynamic fields needed.

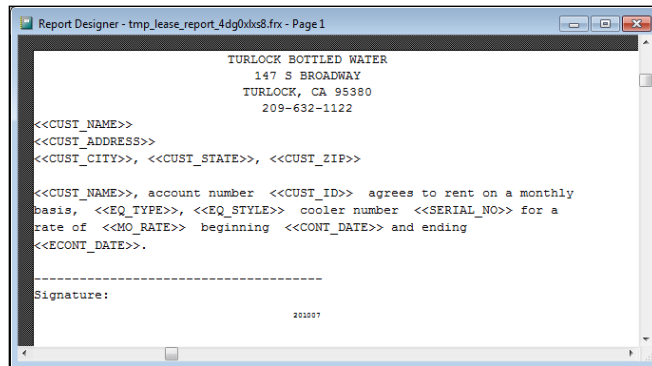


Lastly, enter the footer message that you would like to use on the lease agreement. A *Lease Version* is also available for you to specify the year or reference number for the current agreements.

L	A	<input type="text"/>
L	A	Signature: <input type="text"/>

Contract Period in Months	12	Lease Version	201007	Preview
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Once complete, choose the **Preview** button to view an example of the lease agreement.



Once you are satisfied with the format of the message, choose **Save**.

Repeat these steps for each *Handheld Class* that will be using lease agreements on the handheld. Daily Processing is discussed within the next section.

Daily Processing

The *Handheld Lease Agreement* automatically pops up on the handheld prior to printing the customer's invoice when the driver has either added or swapped equipment on the account. Follow the steps below to complete this process successfully.

1. Add or swap equipment on an existing account.

CHANGE EQUIPMENT
Customer

Serial Number	Type	S...
930124152	CIM 100	C
[ADD]		

◀ ||| ▶

Truck

Serial Number	Type	S...


◀ ||| ▶

←
HIST
SERVICE
ADD

- Once the driver proceeds past the *Confirm Sale* or *Capture Signature* screen, the rental rate for the *Equipment Lease Agreement* will need to be entered. Enter the rate and choose the green arrow.

Please Enter Rental Rate for:
930124152



6.00

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

- The lease agreement details will be displayed on the screen, verify that the information is accurate with the customer and touch the **Save** icon.

Lease Agreement



Advantage Water agrees to provide Modesto Express Foods with equipment #930124152 for a monthly payment amount of \$6.00 starting on 11/05/2009 and continuing until either party terminates service.

- The *Lease Agreement Signature* screen will be displayed. After the customer signs the lease agreement, choose the *Save* icon.

Modesto Express Foods
1472 Sylvan Ave
Modesto, CA . 95355

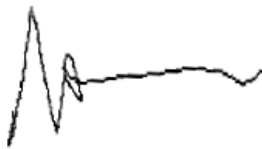
**The undersigned has read and agreed to
all of the terms and conditions set forth
by Advantage Water Company**

- The *Lease Agreement* will print once *Save* is selected, followed by the customer's invoice.

Advantage Water Service Agreement
Customer Service (209) 632-1122

Advantage Water agrees to provide Shop and Save with equipment #9301 24152 for a monthly payment amount of \$6.00 starting on 05/11/2009 and continuing until either party terminates service.
Version: 2009
Thank you for choosing Advantage Water as your water provider.



This completes the *Lease Agreement* process on the handheld. At the end of each route day, the data will be uploaded and stored on the *Contacts* tab within the customer's account. An example is shown in the next section.

Desktop Reprint

Each *Lease Agreement* will be stored within the customer's *Contacts* tab for easy reference. This information will be logged permanently unless it is deleted by a user.

Summary

The *Handheld Lease Agreement* option gives you further flexibility with managing your equipment contracts. If you have any further questions regarding this feature, please contact Advantage Route Systems.

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