

Rental Software Checklist

Use this checklist to make sure that the rental software you purchase has the features you need.

	RentControl		
Configuration and Hardware			
Operates as standalone system (one computer)	✓		
Operates as networked system (single or multiple locations)	✓		
Supports Peer-to-peer network	✓		
Supports Dedicated-server network	✓		
Requires special vendor-supplied hardware			
Uses off-the-shelf PCs and printers	✓		
Supports all Microsoft-supported operating systems (Win 2K, XP)	✓		
Inventory			
Supports serialized assets	✓		
Supports non-serialized (pooled) assets	✓		
Supports barcodes for individual assets	✓		
Supports barcodes for categories of assets (UPC/SKU coding)	✓		
Supports both rental and sale items	✓		
Supports inventoried or non-inventoried sale items	✓		
Unlimited number of categories	✓		
Unlimited number of assets (inventory items)	✓		
Save pictures with both categories and individual assets	✓		
Recording of complete purchase information for individual assets	✓		
Recording of asset's serial number, manufacturer, model, preferred service company, etc.	✓		
Individual assets can be associated with "owners" (for revenue reporting)	✓		
Automatically provide for post-rental turnaround time (e.g., for cleaning or maintenance)	✓		
Maintains complete rental history for each asset	✓		
Automatically suggest a sale price based on asset purchase price	✓		
Tracks meter and mileage readings and bills accordingly	✓		
Operational documents include:			
Availability reports (for specific periods)	✓		
Lists of reserved items	✓		
Lists of rented items	✓		
Lists of items out of service or out for repair	✓		
List of items lost, sold or returned from service	✓		
Summary counts by category			
Exports of inventory data	✓		
Repair and Equipment Service			
Recording of all repair and maintenance activity for each asset	✓		
Generates alert if equipment out for repair has not been returned by due date	✓		
Supports recording and tracking of in-field maintenance/service	✓		
Tracks costs of repairs and maintenance	✓		

	RentControl		
Automatically schedules preventative maintenance based on:			
Elapsed days	✓		
Meter time	✓		
Mileage	✓		
Number of rentals	✓		
Number of days the asset has been rented	✓		
Number of days since start of rental or since last maintenance	✓		
Rental Pricing			
Automatically calculates rental price	✓		
Multiple (14) standard pricing schemes	✓		
Custom pricing schemes available (at nominal charge) if standard schemes unsuitable	✓		
Option to omit pricing for Saturdays and/or Sundays	✓		
Multiple pricing variations can apply to same categories (e.g., for commercial vs. personal pricing)	✓		
Supports individual line item discounts as well as total order discount	✓		
Client discounts can be saved and applied to line items or total order	✓		
Support for negative discounts (for temporary price increases)	✓		
Asset categories can be marked as never eligible for discounts	✓		
Support for discount coupons	✓		
Supports bulk price changes	✓		
Sales tax automatically calculated based on geographical data (state, city, county or ZIP)	✓		
Related rental documents:			
Rental price list	✓		
Sale item price list	✓		
Over-the-Counter Rentals and Sales			
Over-the-counter orders can include:			
Rental items only	✓		
Rental items and sale items	✓		
Sale items only	✓		
Rental items that are being sold	✓		
Locate established clients by:			
Last name	✓		
Any part of name	✓		
Company	✓		
Software-assigned account number	✓		
Software-generated ID	✓		
Driver's license number	✓		
Supports scanning and saving of driver's license data	✓		
Identify client only as a cash customer	✓		
Rental can be commercial (billed to company) or personal (billed to individual)	✓		
Rental period can range from one hour to undetermined (open ended)	✓		
Pick rental dates from calendar or infer from entered duration	✓		
Optionally select rental items using barcode number and scanner	✓		

	RentControl		
Customer documents:			
Contract	✓		
Shipping Manifest	✓		
Packing List	✓		
Invoice	✓		
Record payments (by cash, check, or CC)	✓		
Process credit card charges automatically	✓		
Quotes and Reservations			
Locate established clients by:			
Last name	✓		
Any part of the name	✓		
Company	✓		
Software-assigned account number	✓		
Software-assigned ID	✓		
Driver's license number	✓		
Scan driver's license and capture data	✓		
Rentals can be commercial (billed to company) or personal (charged to individual)	✓		
Rental period can range from one hour to undetermined end data (open ended)	✓		
All dates can be typed or selected from a calendar	✓		
For billing purposes, rental start date can be different from ship/delivery date	✓		
For billing purposes, rental end data can be different from pick-up/check-in date	✓		
Price quotations can be created without regard to inventory availability	✓		
Alert generated if price quote stays open longer than 'x' days (you specify 'x')	✓		
Turn price quotes into reservations with one button click	✓		
All rentals support up to three address elements: client address, billing address and shipping address	✓		
Related quote and reservation documents:			
Price Quotation	✓		
Contract	✓		
Track customers by rental order, date, name of contact person or by employee who took order	✓		
Reserving and Attaching Equipment			
Equipment reserved generically (by category) to permit flexibility	✓		
Future orders can reserve equipment currently out on rental	✓		
Equipment availability based on rental dates (permitting the same equipment to be reserved for multiple orders assuming their rental periods don't overlap)	✓		
Automatic prevention of double-booking	✓		
Inventory shortfall options:			
Outsourcing (sub-rentals)	✓		
Planned automatic substitution	✓		
Automatic same-price substitution	✓		
Automatic free upgrade	✓		

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Kits (package) options			
Pre-assembled (specific inventory items belong to the kit)	✓		
Templates (generic inventory categories comprise the kit)	✓		
Related items (optional items that may accompany the primary item)	✓		
Organize rented items into logical sections when reserving and renting	✓		
Record payments (by check, cash, CC) or set as invoiceable	✓		
Optionally process credit card payments	✓		
Rental automatically priced based on rental period and pricing scheme	✓		
Automatically-calculated price can be overridden	✓		
Identify rental items using barcode scanner	✓		
Attach items in bulk using portable data terminal and barcodes	✓		
Option to automatically attach all non-serialized assets	✓		
Optionally attach outsourced (sub-rented) items in bulk	✓		
Add sale items to any order	✓		
Accept refundable deposit	✓		
Accept and record non-refundable pre-payment	✓		
Process pre-payment by credit card automatically	✓		
Tracks cost for outsourced items	✓		
Prevent order delivery until all needed items are attached	✓		
Customer documents:			
Shipping Manifest	✓		
Packing List	✓		
Delivery Ticket	✓		
Invoice	✓		
Operational documents:			
Pick List	✓		
Shipping Label	✓		
Order assembly and delivery schedules	✓		
Customer documents can include order-specific or equipment-specific remarks	✓		
Active Rentals			
Support for swapping out defective items	✓		
Support for order splitting (when one or more assets are returned early)	✓		
Support for order rollover (to extend a fixed-term rental)	✓		
Automatic adjustment of other in-system rentals affected by changes	✓		
Record in-field service and repair activities	✓		
Record location changes during rental	✓		
Automatic alert for overdue rentals	✓		
Operational documents:			
Pick up ticket	✓		
Pick-up and check-in schedule	✓		
Ability to generate a sales quote for items in a rental	✓		

	RentControl		
Check-in and Other End-of-Rental Activities			
Check-in returned items using barcode scanners	✓		
Check-in returned items for a single order in bulk using portable data scanner and bar-codes	✓		
Check-in returned items for multiple orders in bulk using portable data scanner and bar-codes	✓		
Optionally and automatically check in non-serialized assets in bulk	✓		
For metered assets, automatically prompt for meter reading and calculate price	✓		
For mileage charges, automatically prompt for odometer reading and calculate price	✓		
Automatic inventory adjustment for lost or destroyed items	✓		
Automatic marking of damaged items as out for repair (to prevent inclusion in other rentals until repairs are completed)			
Automatically bill for lost or destroyed items	✓		
Supports sale of any rented items with appropriate billing	✓		
Sale items (like consumables) can be added or deleted at end of rental	✓		
Additional charges (like pick-up charges) can be added at end of rental	✓		
Price adjustment at end of rental to handle early or late return, equipment problems, etc.	✓		
Support for partial returns (remaining items can be rolled over into a new contract)	✓		
Final payments can be recorded (by cash, check or CC)	✓		
Final payments by credit card can be automatically processed	✓		
Payments and Customer Accounts			
Supported payment terms: COD, Net 0, Net 15, Net 30, Net 60, Net 90, Credit Card	✓		
Supported payment types: Cash, check, credit card	✓		
Integrated credit card processing	✓		
Ability to swipe credit cards	✓		
Payments can be recorded at any time	✓		
Automatically process monthly credit card charges for extended rentals	✓		
Allocate payments to multiple invoices	✓		
Apply and allocate credits to client accounts	✓		
Apply debits to client accounts	✓		
Automatically apply interest to overdue accounts	✓		
Operational documents:			
Daily receipt journal	✓		
Summary report of all credit card charges	✓		
Overdue accounts	✓		
Client documents:			
Balance forward statements	✓		
Open item statements	✓		
Invoices	✓		
Automatically generate monthly statements	✓		
Generate individual statements on demand	✓		
Permit designation of tax exempt companies	✓		
Permit designation of clients as "deadbeats" (prohibited from future rentals or sales)	✓		
Easily examine client accounts	✓		

	RentControl		
Transfer invoices and/or payments to QuickBooks® (2007 or later)	✓		
Transfer client names, addresses and payment terms to QuickBooks	✓		
Invoicing, Taxes and Financial Reporting			
Generate invoice for particular client	✓		
Generate all needed invoices in a period	✓		
Support centralized billing for commercial accounts	✓		
Support for third-party billing	✓		
Ability to reprint invoices as needed	✓		
Include own logo on invoice, statement and receipts	✓		
Optionally include asset details (barcodes, asset numbers, serial numbers) on invoices	✓		
Generate invoice at beginning of rental	✓		
Generate invoice at end of rental	✓		
Generate invoice at the end of each billing cycle	✓		
Support both 28 and 30-day billing cycles	✓		
Automatically apply damage waiver to each rental	✓		
Automatically exempt damage waivers from being applied to those with insurance	✓		
Optionally add labor charges to invoices	✓		
Optionally add delivery charges to invoices	✓		
Create invoices for charges unconnected to rental	✓		
Apply taxes based on state, city and/or county	✓		
Automatically calculate tax based on shipping address	✓		
Designate certain items as non-taxable	✓		
Financial documents:			
Taxes invoiced by locale	✓		
Taxes collected by locale	✓		
Earned revenue report	✓		
Earned revenues by category of asset	✓		
Training and Support			
Training is optional and not usually required	✓		
Availability of interactive internet training	\$40/hr		
Availability of on-site training	\$500/day plus travel		
IT support for single-PC or single-user system	not required		
IT support for networked or multi-location system provided by vendor			
Availability of telephone support (free with purchase, on-line hours 8am-8pm EST; on-call hours 24/7)	✓		
Availability of email support (guaranteed turnaround within 48 hours)	✓		
Availability of software upgrades (free first year)	✓		
Printed documentation	✓		

RENTAL SOFTWARE CHECKLIST FROM PRINCETON CYBERNETICS, INC.
 SUITE 159, 301 N. HARRISON ST.
 PRINCETON, NJ 08540
 (609) 924-7114
 (800) 243-1666
 (609) 921-3561 (FAX)
 WWW.RENTCONTROL.BIZ