Getting Started with EZRentOut

Rental Management done right!

Step 1 – Identify your items

Identify what type of items you will track. There are three different types of items available.

| ITEMS TO RENT		ITEMS TO SELL
ASSETS	**ASSET STOCK**	**INVENTORY**
Rental items that are tracked individually e.g. Forklift Trucks and Cars.	Rental items that are NOT tracked individually e.g. cables or chairs.	Items that are sold e.g. water bottles or fuel.
If you have 10 similar trucks, add 10 assets for them. Use the clone functionality to do things quicker.	If you have 100 chairs, add an Asset Stock and add a stock of 100 to the record.	If you have 300 water bottles, add an Inventory. Then add a stock of 300 to this inventory record.
Assets are reserved or rented out to customers through orders.	Asset Stocks Quantities are reserved or rented out to customers through orders.	Stock Quantities are reserved or sold to customers through orders.

Asset Stock and Inventory modules can be turned off from the Add-ons, if you don't need them.

Step 2 – See if you need Custom Fields

Items in EZRentOut come with predefined set of fields. However, if they are not sufficient for your needs, you can add custom fields.

Custom Fields are also available for Orders and Customers but they will be discussed when orders and customers are introduced in the subsequent steps in this manual.
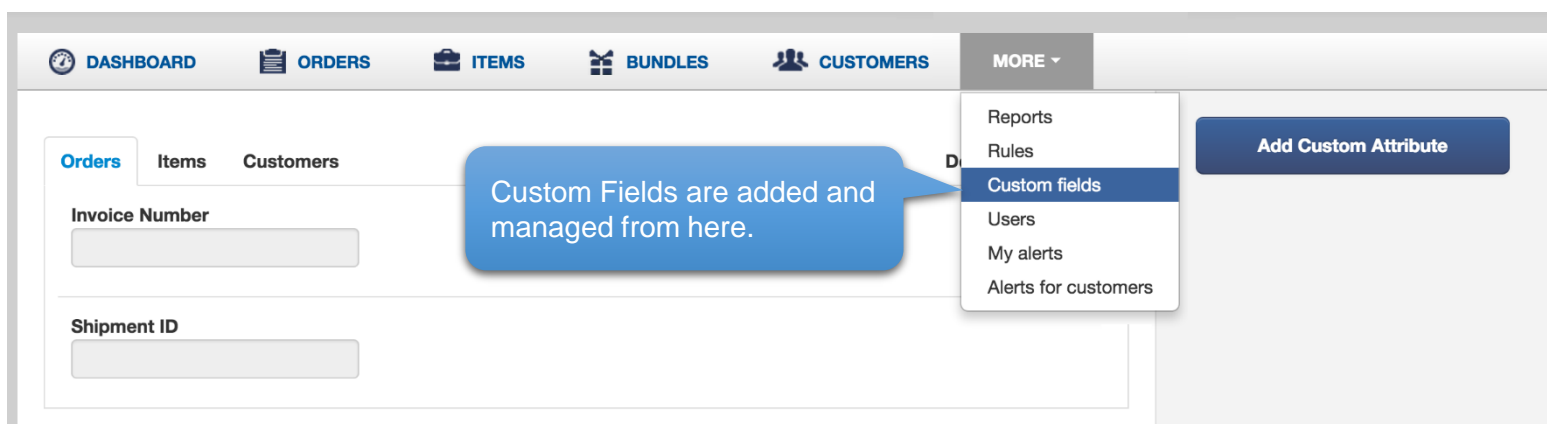
Different item groups can have different Custom Fields. Learn More

Asset #33: DSLR Camera with Lens

Focal Length	28 – 200 mm
Image Stabilization	Yes
Shutter Speed Step	1/2

Step 3 – Add Items

Let's go ahead and create a few rental and sale items.

Add an Asset → **Clone if you've similar items** → **Explore an Asset's Detail Page**

Add an Asset	Clone if you've similar items	Explore an Asset's Detail Page
Start by adding an asset, say a Forklift Truck	If you've 10 Trucks, you can make 9 more copies of the first Forklift Truck (in a single action).	You can add images and documents, add comments, keep a log of services, and take a number of actions.

Add an Asset Stock	Add Stock to it	Explore the Detail Page
Start by adding an asset stock record, say Chairs	Once the record is created, add stock to it e.g. 100 Chairs at Manhattan, 70 at Bronx.	You can add images and documents, add comments, and take a number of actions. There is also a list showing Current Checkouts.

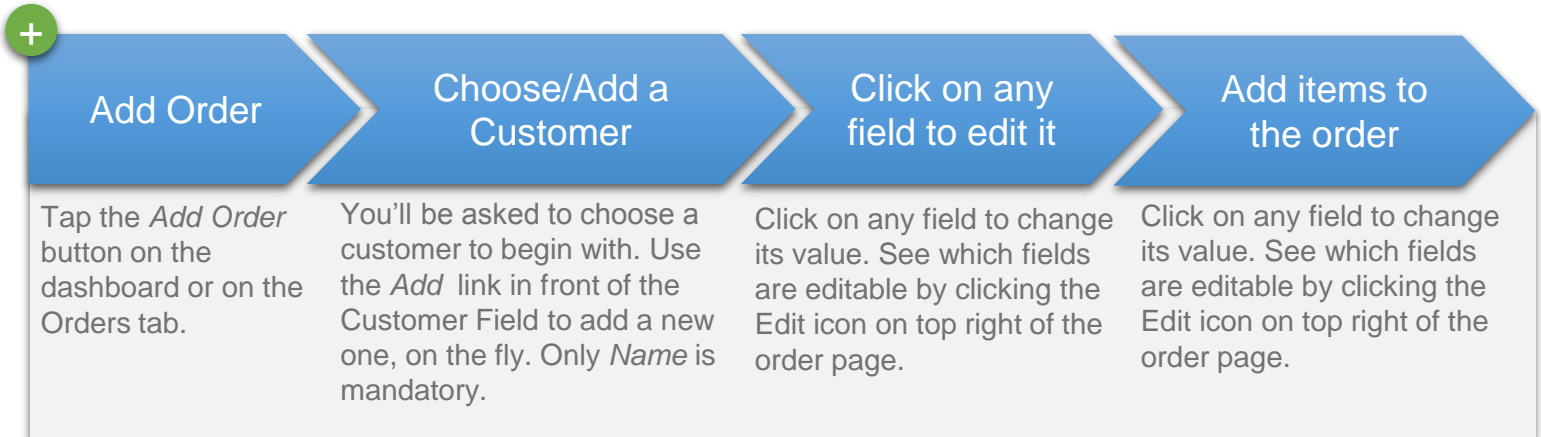| Add an Inventory	Add Stock to it	Explore the Detail Page
Start by adding an inventory record, say Water Bottles	Once the record is created, add stock to it e.g. 100 Bottles at Manhattan, 30 at Brooklyn.	You can add images and documents, add comments, and take a number of actions.

If you have items in Excel Sheets, import them directly to EZRentOut.

[Learn about best practices](#)

Step 4 – Create your first order

All Rental and Sale transactions happen through orders.

Add Order	Choose/Add a Customer	Click on any field to edit it	Add items to the order
Tap the *Add Order* button on the dashboard or on the Orders tab.	You'll be asked to choose a customer to begin with. Use the *Add* link in front of the Customer Field to add a new one, on the fly. Only *Name* is mandatory.	Click on any field to change its value. See which fields are editable by clicking the Edit icon on top right of the order page.	Click on any field to change its value. See which fields are editable by clicking the Edit icon on top right of the order page.

There are availability cues when you're adding items to an order, so that you draft an order without any scheduling conflicts.

>>Collapse View<<

Item #	Name	Current Location	Duration/Quantity	Price	
x 10	A Prius – one	This asset is Checked Out for order# 87 from: June 08, 2015 06:14 to: August 04, 2015 10:16 Manhattan, NY	6 Days	$510.00	
x 54	A Ford Clubwagon E350 ⚠	Manhattan, NY	6 Days	$1,800.00	
x 134	A Forklift: CAT ⓘ	Manhattan, NY	144 Hours	$3,600.00	

See if you need…

- **Custom Fields:** Can be added from MORE → Custom Fields → Orders

- **Separate Billing Duration:** If your Rental and Billing durations are different, have a look at *Your name at top right* → Settings → Add Ons → Billing Duration

- **Customized Invoices:** Basic invoice customization is available under Settings → Company Settings → Customization of Invoice. Or you can design an invoice from scratch using the invoice designer under Add Ons.

Step 5 – Get cozy with your first order

Order #, Status and the payment that's due

Action Buttons

Order Dates

Order# 97 Draft
(Payment pending: $5,001.47)

✏ Edit | 🗑 Delete | ▦ Clone

Expected Rent Out Date	June 17, 2015 03:48
Expected Return Date	June 24, 2015 03:48
Order Duration	1 week

Location: Boston 👁 Add

Your Customer!
Save Credit Card on file [1]
Send Emails [2]

Customer: Kevin Martinez 👁 💳 ✉

Discount: 0.000%   Assigned To: Jennifer Robinson 👁

Heading on Invoice: QUOTATION - Martinez Construction Works

Add Items: 58 - Ford Clubwagon - E-350 (Overdue since June 09, 2015 07:11) × | Add | Advanced Options

☐ Show only available assets for given duration
☐ Sort by proximity to customer
☐ Show only available bundles for given dura...

The place to add rental and sale items

>>Collapse View<<

Item #	Name	Current Location	Duration/Quantity	Price	⋮
x 131	Ⓐ Forklift: CAT	Boston	168 Hours	$4,200.00	
x 145	Ⓐ Forklift: Indoor	Boston	168 Hours	$1,680.00	
x 70	Ⓘ Gas - Premium	Boston/Main Warehouse	10 @ $4.08 per unit	$40.80	

+ New Row (for sub renting or ad-hoc items etc)

Customize Columns

Rent Out Order
Confirm Booking
Charge Payment
Verify by scanning
Change Tax Rate
Custom Entry
View Invoice
Add Coupons

...ems List ▾
History ▾

📄 **Order Details Help**

Editing an order
Custom Entry
Items in an order
Current Location
Taxes

Click to change quantities or prices [3]

A – Asset
S – Asset Stock
I – Inventory

Items Sub-Total	$5,664.08
Federal Tax: 10.0%	$592.08
Damages	$0.00
Total	$6,512.88
Paid Amount	$0.00
Refund	$0.00
Payable Amount	**$6,512.88**

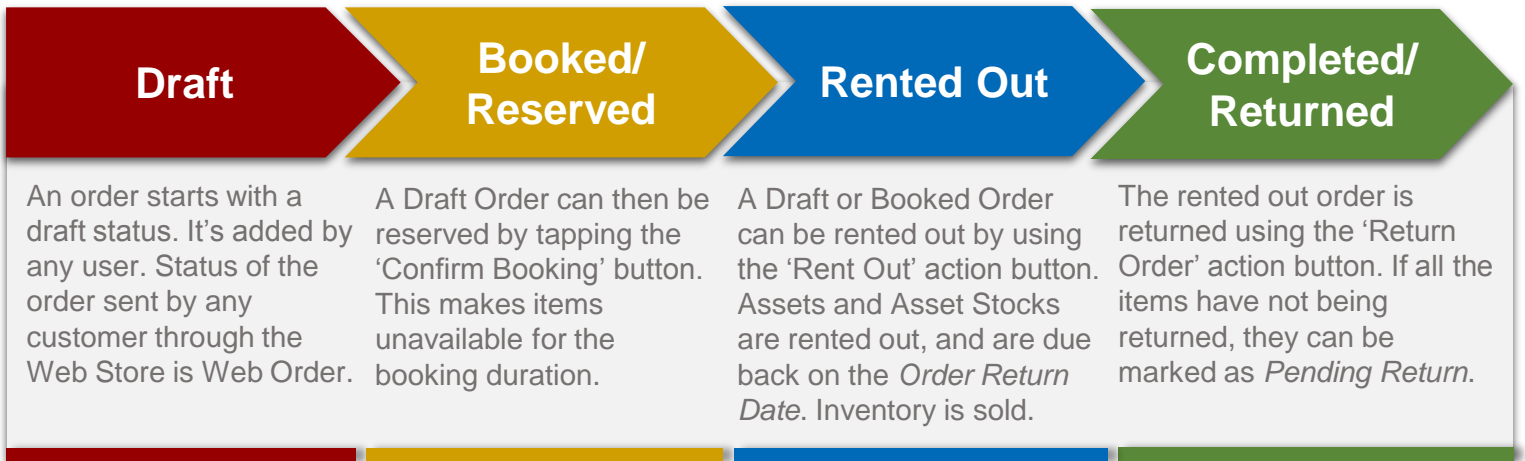[1] Credit Card Payments should be enabled from Add Ons
[2] Should have email address in the records
[3] Prices and Rental Rates are added to items. If you want to over-ride them in the order, choose this option in Settings → Company Settings

You can also add comments to an order, and attach documents to it.

Step 6 – Rent Out an Order

Reserve your draft order or rent it out. Here are the main phases, an order goes through.

Draft	Booked/Reserved	Rented Out	Completed/Returned
An order starts with a draft status. It's added by any user. Status of the order sent by any customer through the Web Store is Web Order.	A Draft Order can then be reserved by tapping the 'Confirm Booking' button. This makes items unavailable for the booking duration.	A Draft or Booked Order can be rented out by using the 'Rent Out' action button. Assets and Asset Stocks are rented out, and are due back on the *Order Return Date*. Inventory is sold.	The rented out order is returned using the 'Return Order' action button. If all the items have not being returned, they can be marked as *Pending Return*.

Try out other actions, such as Charging Damages, Custom Entries (to add any charge or adjustment), Printing Invoice.

Use the 'Charge Payment' button to record payment against an order. All payments for an order are recorded separately with a detailed Payment History.
Orders that have been returned/completed, but still have outstanding payments are shown with the Payment Pending status.

Order# 95 Payment Pending
(Payment pending: $4,000.00)

Learn more about orders

Step 7 – Populate your Customers Directory

From the Customers tab, you can view all of your customers, send them emails, and pull up their details.

DASHBOARD	ORDERS	ITEMS	BUNDLES	CUSTOMERS	MORE ▼

Customers

Add New Customer

Import From Excel Sheet ▼

Actions ▼

Filter ▼

- ✉ Send E-mail
- ⊘ Mark Inactive

Filter
All customers
Having checked out orders
Number of completed orders
Taxed
Non-taxed
Inactive customers
Subscribed to alerts
Not Subscribed

	Phone Number	Email	Checked Out Ord	...tomers Help
☐ Alex Kinsey	--		0	
☐ Emma Robinson	585-988-8955	emma.robinson@rentoutexample.com	1	
☐ Henna Lambart	898-215-9875	henna@ezrentoutexample.com	0	
☐ Irenena Williams	325-865-9866	irenena@rentoutexample.com	1	

Divide customers in categories, manage contacts and do more.

Emma Robinson

Corporate Customer

89 orders to date

$5,500 worth of orders, this month

Contact Details

emma@example.com

Phone: 338-879-3335

421 East 70th Street
New York, NY 10021

💡 [Learn more about Customer Management](#)

If you have customers information in Excel Sheets, import it directly to EZRentOut.

Step 8 – Strike conversations with your customers

From the Customers Tab: Send Newsletters, Promotions etc.

From an Order Page: Send Quotes, Invoices and Payments Notes
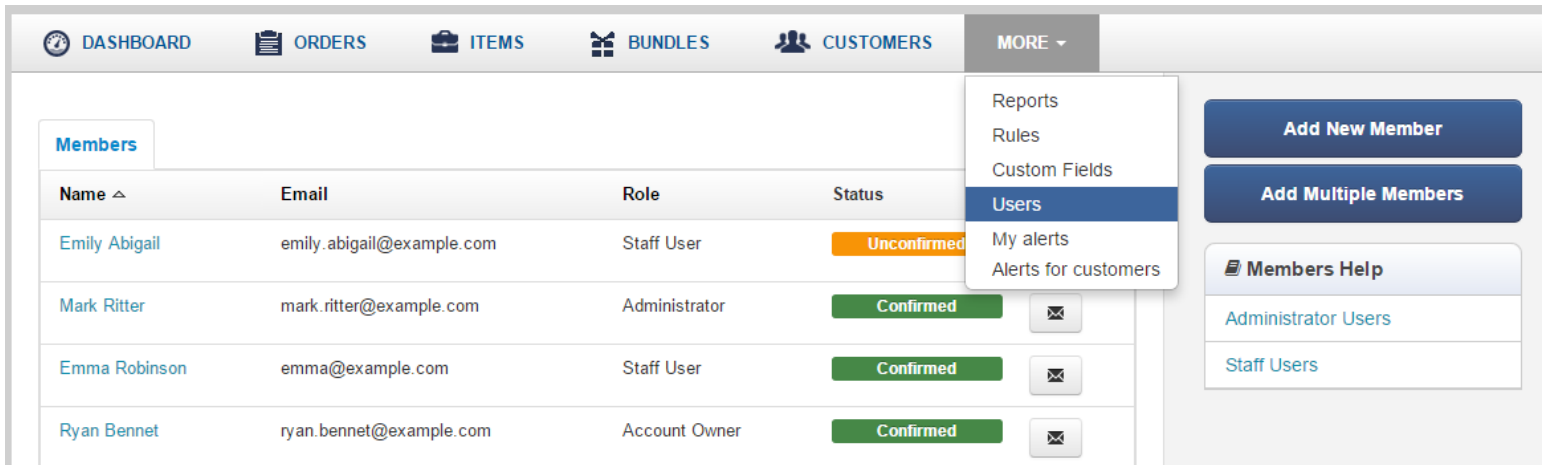
Step 9 – Add your staff

Add your staff (users) to EZRentOut, so that everyone on your team can work with customers, take orders, receive payments, and do more.

Users can be Admins or Staff Users. **Admins** have full access, can add and update items, and run reports. **Staff Users** cannot add or update items. Access and Visibility rights for staff can be configured from *Your name at top right* → Settings → Company Settings.

Orders can be assigned to users, and then reports can be run to know who is performing better.

Mark Ritter
mark@example.com

Staff at Front Desk # 1
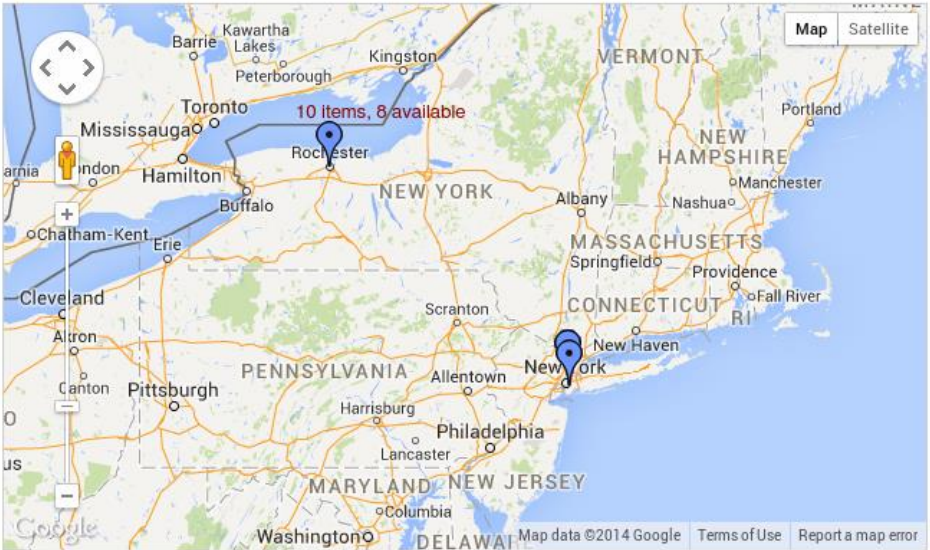
5 orders assigned to him

Closed $25,000 worth of orders, this month

Step 10 – Locations, Groups and Vendors

Groups	Use groups and subgroups to categorize your items. For example, all the Camera Lens and Tripods can go to Camera Accessories group.
Vendors	Vendors who provide services, or supply assets and inventory, go here. For example you can record all services that Caterpillar provided for your cranes. Or all the cranes that you got from Caterpillar.
Locations	Orders, Assets and Stock can be tracked across different locations. If you provide the correct address when adding locations, we'll show your items on a map. These locations can also be building rooms, warehouses or cabinets.

Step 11 – Try out different listing views

Turn on Compact View in Assets to combine items with same names

Toggle to Thumbnails

Customize Columns

Similar to Compact View on Assets, there's *Location Stock View* on Inventory and Asset Stock. This view shows stock quantities by location instead of showing the total quantity per item.

You can increase the page size from Settings → My Settings

Step 12 – Print QR Code or Barcode Labels

Design and print professional grade QR Code or Barcode labels and tag your items.

Step 13 – Use mobile apps to scan labels and take actions

Pulling up orders and taking actions becomes extremely convenient with the mobile apps. Scan invoices to rent out and return orders. Scan items to add them to order, or to verify them.

Download: For iPhone/iPad | For Android Phones &Tablets
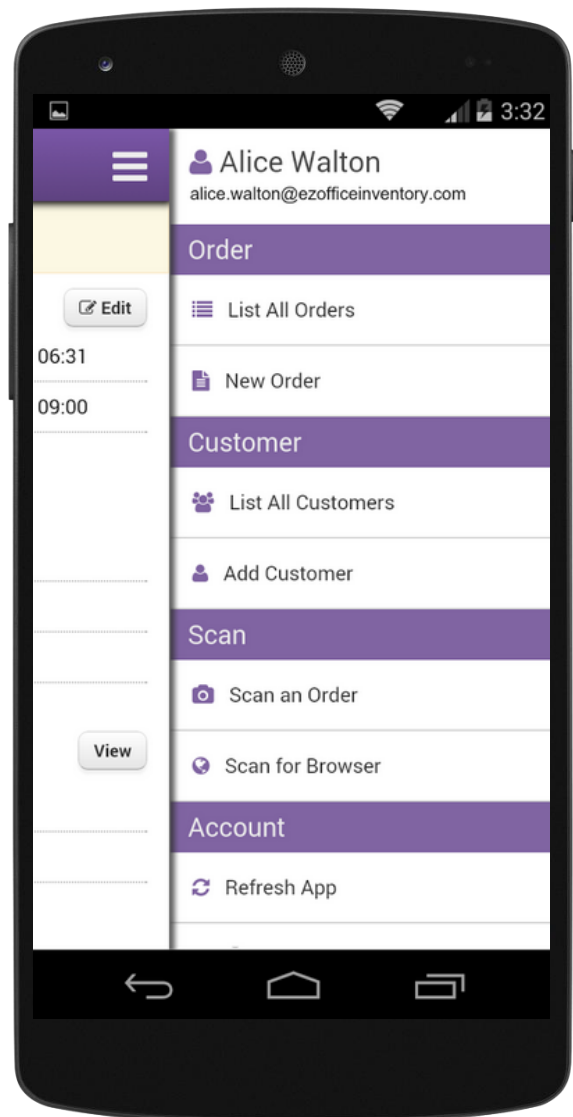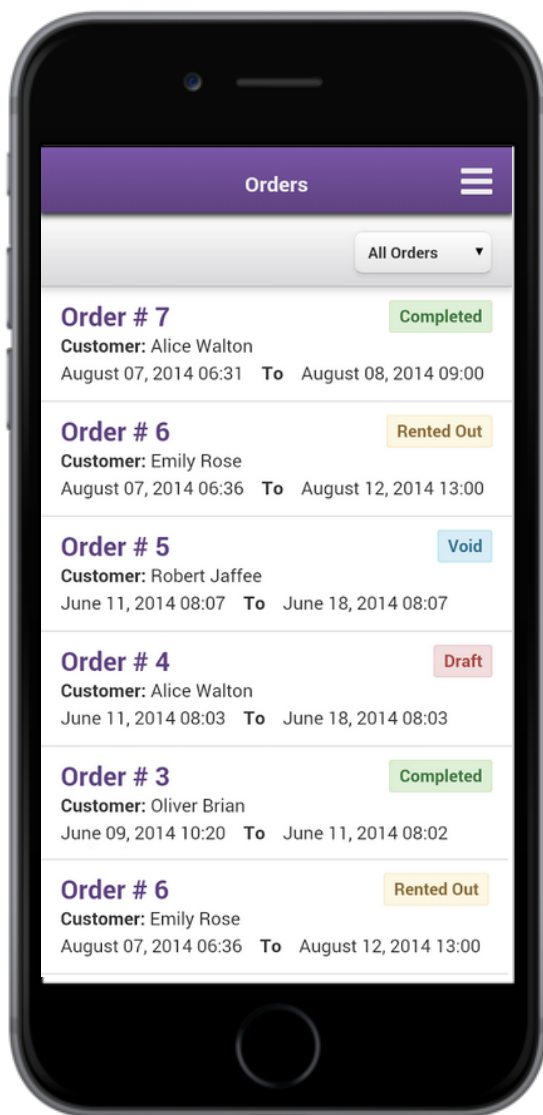
You can also use EZRentOut in Safari, if you're using an iPad.
Order Tab is what you'll have open on your front desk for operations.

Step 14 – Set up Point of Sale

Set up a Point of Sale (POS) for the checkout desks in your store.

Customer Walks In	Add an order for the customer	Scan Rental/Sale to add to order

Swipe Credit Card to charge payment	Email/Print Invoice	Voilà

Learn more about POS

Step 15 – Set up your Web Store

Put your business online, and unlock endless opportunities. Start from Settings → Store Settings

The new version is arriving this summers.

Step 16 – Explore Add Ons and Integrations

Once you're done with the basics, try out Advanced Settings and Add Ons. There're over a dozen of them.
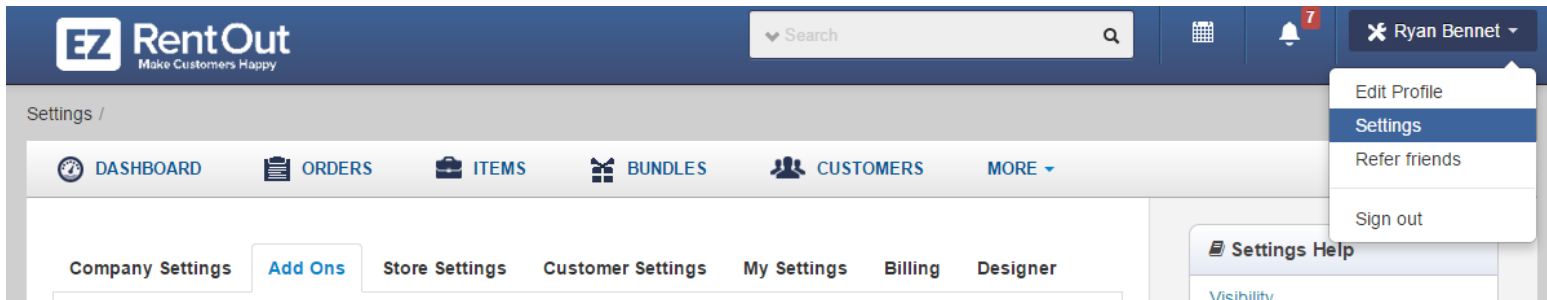
In Settings, you can choose company logo, select your time zone and configure a number of other policy level settings. Here are some of the popular advanced features.

Xero and QuickBooks Financial software integrations

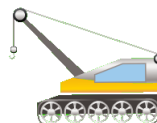Recurring orders that repeat after a certain duration

Availability calendar to plan better, and stay on top of things

Online payments through PayPal, Authorize.net & Stripe

Bundles to make kits and packages

Maintenance module to keep equipment in best shape

We're here to help!

If you have any questions or feedback, write to us at support@ezrentout.com

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