Rent Centric V 3.0
User Manual

Developed by Rent Centric, Inc.

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Introduction

About Rent Centric, Inc.

Rent Centric Inc. ™ is Canada's leading provider of web based automotive rental and customer management software suite.

Proud holder of the highest Better Business Bureau Rating of A+ for Customer Satisfaction.

Our Technologies are dedicated to delivering scalable web-based fleet management software that will be tailored to meet the requirements of both small and large operations.

Rent Centric prides itself in having achieved satisfactory results with our customers time and time again. Our proven technology combined with our team of professionals have allowed us to realize our goal; to provide fleet management solutions that deliver measurable and sustained returns on our clients' investments.

About Rent Centric Vehicle Rental Software

Rent Centric™ is a full featured web-based application designed specifically for your automotive fleet management.

With Rent Centric™ you can focus on the task of running your business, economically and worry free. Rent Centric™ will run your back-office and front-end office. Your customers will be able to quickly and easily make online reservations and monitor their accounts through the system's web based and user friendly environment.

Contact Rent Centric

One Dundas Street West, Suite 2500
Toronto, Ontario, Canada, M5G 1Z3
Google Map >>

Business & Support Hours: Monday - Friday 9 AM - 5 PM EST
Except statutory holidays

Tel: 416-250-1519 Ext. 22
Fax: 416-250-1082
Toll Free: 1-866-999-1519 Ext. 22
E-mail: support@rentcentric.com

i-Ticket

You can submit tickets online via, http://support.rentcentric.com.
Please ask one our support representatives to show you how to register for i-Ticket, Rent Centric online ticketing system.

Login to Rent Centric

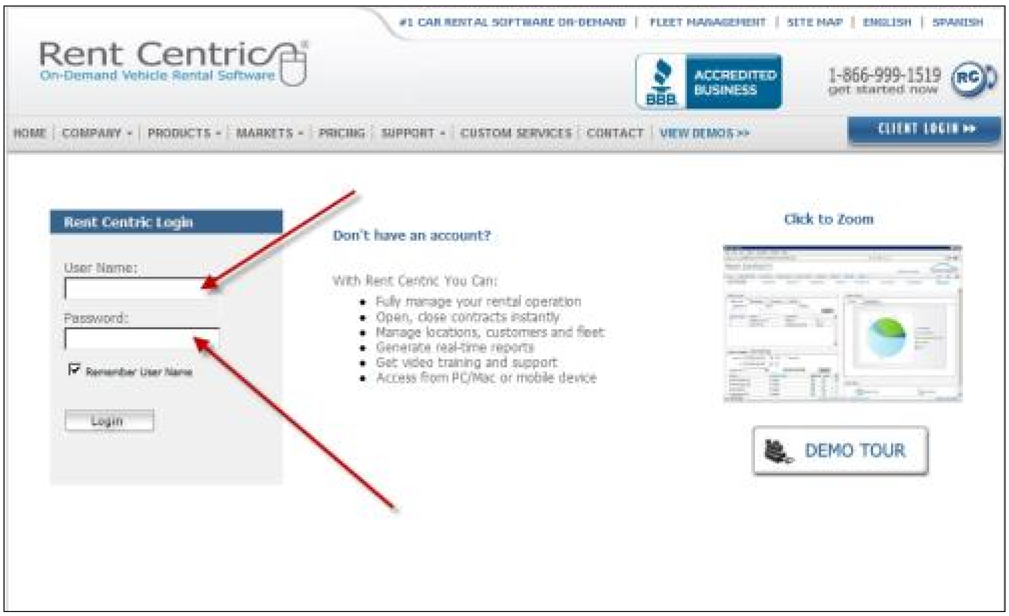
You can to login Rent Centric from PC or Mac with any web browser at:

Supported Browsers are:
Microsoft Internet Explorer, Mozilla Firefox, Google Chrome, Apple Safari, and Opera

(We recommend Internet Explorer 7 and higher)

Your default login ID and Password will be given to you by Rent Centric support staff. It is then recommended that you change your password once you login for the first time (please see "changing password" section).

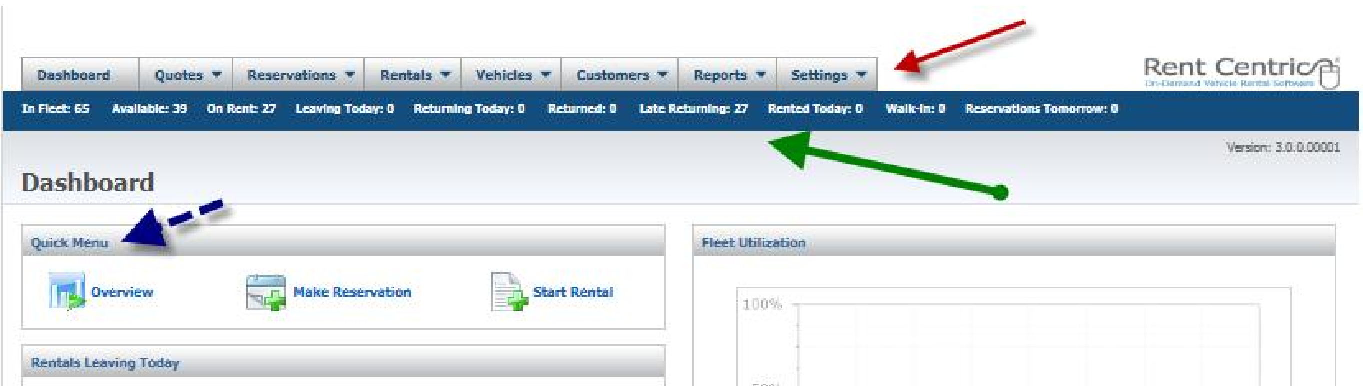
https://www.rentcentric.com/login.aspx



Navigating Rent Centric

Once you are logged into Rent Centric, you will have two sets of navigation buttons and quick menus available to you:

1. Top Navigation Bar
2. Real-time Dashboard
3. Quick Menu



Top Navigation Bar

This bar will appear at the top of your page at all times, giving you easy access to the following menus:

Dashboard

Brings you back to the main page in the system.

Quotes

Allows you to add a New Quote, Show All quotes or search for a specific Quote by #.

Reservations

Allows you to add a New Reservation, Show All reservations or search for a specific Reservation by #.

Rentals

Allows you to add a New Rental, Show All Rentals or search for a specific Rental by #.

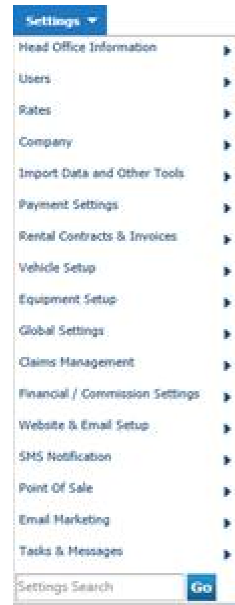
Vehicles

Allows you to add a New Vehicle, Show All Vehicles or search for a specific Vehicle by #.

Customers

Allows you to add a New Customer, Show All Customers or search for a specific Customer by #.

Reports
Allows you to select report headings of Vehicles, Customers, Rentals & Reservations or Management reports.



Settings
Allows you to go directly to a specific area for system or user set up.

Logout
Will log the active user out of the system.

Help
Will launch the User Manual for the system.

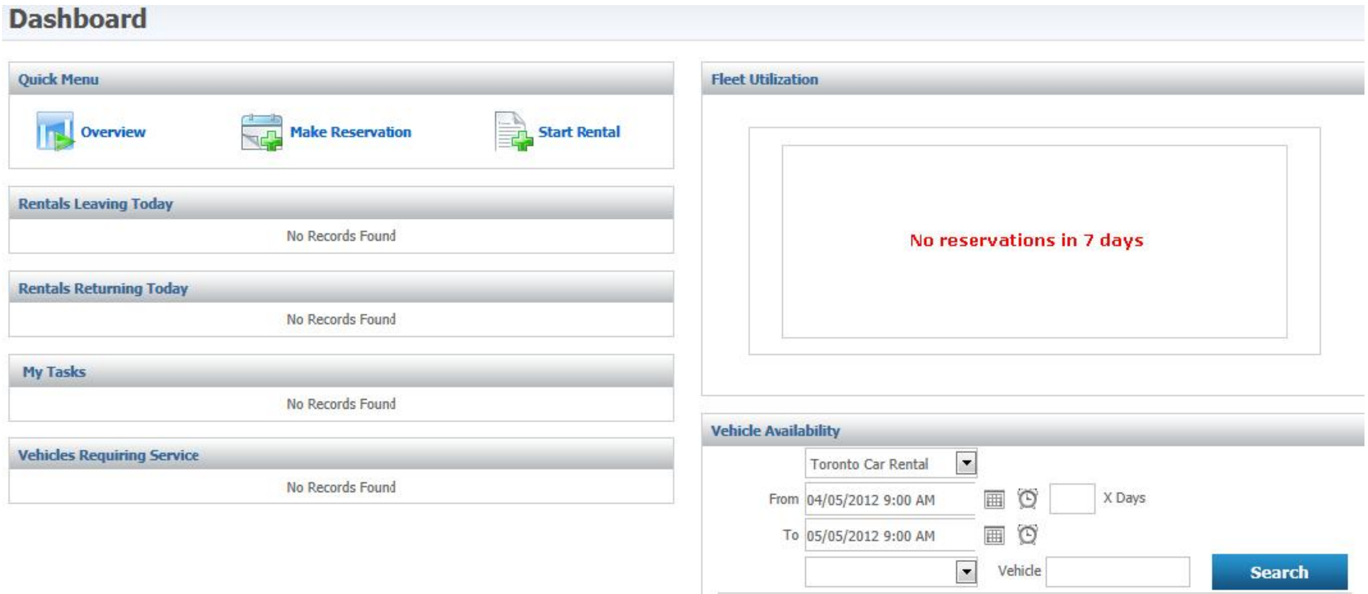
Print
Will printout the main content screen of the software. Primarily used to print rental contracts.

Real-time dashboard

Real-time dashboard displays real-time information from your rental and fleet. By clicking on individual links in real-time dashboard you will obtain a list for selected item.

- **InFleet**
  Displays total number of vehicles in your fleet
- **Available**
  Displays total number available vehicles at the present time
- **On-Rent**
  Displays total number rentals open at the present time
- **Leaving Today**
- Provides total number of rentals leaving or going out today
- **Returning Today, Returned and Late Returning**
  Displays total number of open rentals due in and late
- **Rented Today**
  Displays total number of rentals scheduled to go out today
- **Walk in**
  Displays total number of rentals generated without a previous reservation
- **Reservations Tomorrow**
  Displays total number of reservations due to go out tomorrow

Dashboard Menu



Quick Menu

The Quick Menu displays three sections which are used often during a daily car rental operation:

- **Overview**
  You will quickly see reservations and rentals for the next two weeks.
- **Make Reservation**
- You are taken to the start of a new reservation
- **Start Rental**
  You are taken to the start of a new rental

Rentals Leaving Today

You will see a list the rentals going out today

Rentals Returning Today

You will see a list the rentals returning today

My Tasks

You will see a list of tasks assigned to you

Vehicles Requiring Service

You will see a list of vehicles currently requiring service

Fleet Utilization

Provides information on % of utilization

Vehicle Availability

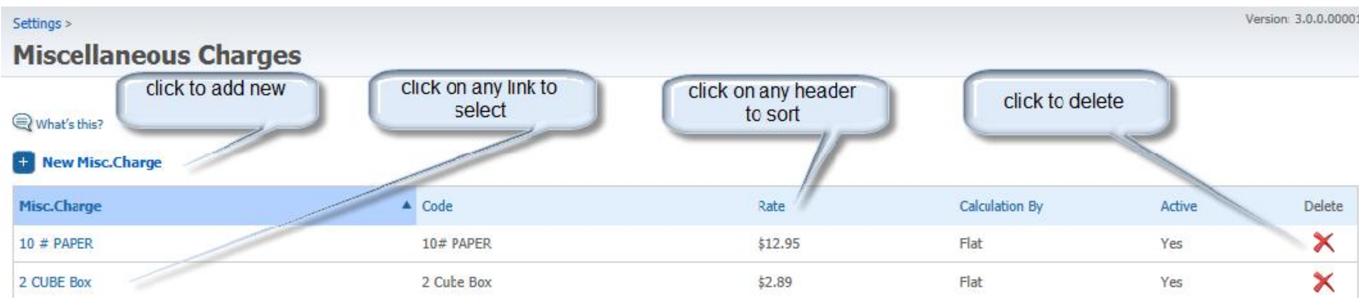
You could quickly search for available vehicles on a given date and type of vehicle.

- **Location:** Location where vehicle may be located or renter's pick up location
- **Detailed Look up:** You may search by Vehicle ID, License Plate #, Vehicle Type, Active/Non-Active, Location and Date range. See Settings > Master System Set up
- **Num Days:** Number of days of proposed Reservation or Rental
- **Vehicle Type:** Vehicle Type assigned to vehicle
- **Vehicle ID:** System Vehicle ID #

Rent Centric List Navigation

In Rent Centric you can perform the following actions:

- Add New Item
- Sort
- Select
- Delete



Getting Started

To get started with Rent Centric please follow the steps below:

1. Learn how to browse and use the system
2. Edit your location information
   Click on Settings > Head Office Information
3. Enter Makes, Model and Vehicle Types which you have in your fleet
   Click on Settings > Vehicle Set up > Makes or Models or Vehicle Types > to add new
4. Enter you vehicles
   Click on Vehicles > Add New Vehicle
5. Enter new Rates
   Click on Settings > Rates > Rental Rates > Master Rates
6. Enter your local Taxes
   Click on Settings > Rates >Taxes > New Tax
7. Enter Miscellanous Charges
   Click on Settings > Rates > Miscellaneous Charges > New Misc.Charge
8. Enter Insurance Coverage
   Click on Settings > Rates > Insurance Coverage > New Insurance
9. Learn how to create a quote, reservation and checkout
   Please refer to related sections in this manual
10. Setup your online reservation website
   Please refer to Web Customer section in this manual

Quote

This tool allows you to generate a quotation of a rental including taxes and any insurances or MiscCharges added.

Search

You may search for a quote by Quote # or First name or Last name of renter

New Quote

- **Pickup Date:** Expected Date out of vehicle
- **Return Date:** Expected Date in of vehicle0
- **Pickup Location:** Location Out of vehicle
- **Return Location:** Location IN of vehicle
- **Company:** Company of employment for client
- **Vehicle Type:** Vehicle type assigned to vehicle for quote
- **Rate:** Rental rate assigned to vehicle type for quote
- **Memo:** Notes or memo
- **Discount:** You may generate a discount based on % or $
- **Options:** You may check MiscCharges and/or insurance to quote
- **Add/Edit Other Charges:** You may add/edit Other Charges I - IV

- **Generate:** System will calculate all items in quote
- **Save:** You may save the quote; after save you may
  - **Reserve:** You may generate a reservation based on quote information
  - **Rent:** You may generate a rental based on quote information
  - **Email:** You may email the quote to your client
  - **SMS:** You may sent quote information to your client’s cell phone
  - **Print:** You may print the quote
  - **Make New Reservation:** Start reserve process
  - **Start Rental:** Start Rental

Reservations

This tab is to perform a search for reservations or add new reservations. This is an easier way to search for a customer with their reservation information.

Search

This utility allows you to search for an existing reservation by # or First name or Last name

New Reservation

- **Reservation #:** Automatic numbering set up in Location Information from the Settings tab or over ride the field.
- **First Name:** Add renter's first name or click Search to search for customer in your database
- **Last Name:** Add renter's Last name
- **Email:** Add renter's email address
- **Phone:** Add renter's telephone #
- **Pickup Date:** Enter date vehicle is to leave location. You may select date from the calendar or enter in input box. You may select time from clock or enter time in input box
- **Num Days:** Enter number of days of rental to auto complete Date In
- **Return Date:** Enter date vehicle is to return to the location. You may select date from the calendar or enter in input box. You may select time from clock or enter time in input box
- **Vehicle Type:** Select Vehicle type from drop down menu
- **Rate:** Select rental rate specific to vehicle type selected
- You may edit rates for this one reservation; not the rental rate
- **Pickup Location:** Select Location Out from drop down menu
- **Return Location:** Select Location In from drop down menu
- **Company:** Enter company name of customer's employer or search companies/corporates database
- **Discount:** Select % or $ and amount of discount, if applicable. Amount will subtract from the rental
- **Discount Reason:** Select discount reason from drop down menu added previously from the Settings tab > Rental/Discount Reason
- **Options:** Select miscellaneous charges and/or insurance coverage
- **Add/Edit Other Charges:** Click to add/edit other charges. Use to add a random charge such as extreme cleaning or enter minus amount (-50 for example) to provide a discount not taxed if entered in other charges
- **Customer Notes:** Notes for customer, pick up at airport for example

- **Memo:** Add note
- **Vehicle**: You may assign a specific vehicle or leave the reservation for a vehicle type only
- **Estimated KM**: You may add the renter's estimated miles/KM to be driven
- **Referral:** Add New referral or select from drop down menu previously added from the Settings tab > Referrals
- **Airline:** Airline of renter's flight, if applicable
- **Flight #:** Flight # of renter's flight, if applicable
- **Hotel:** Local hotel of renter, if applicable
- **Arrival Airport:** Local airport of renter's flight, if applicable
- **Update Charges Summary:** Any items charged will appear here and may be updated if changed.
- **Payment Processing:** If set up to process debit/credit cards in Internet Payment Gateway on the Settings page you may apply a processed payment or add cash payment
- **Swipe for Better Discount Rate:** Swipe the credit/debit card to receive a better transaction charge rate or enter manually
- **Process Credit Card:** Check to process debit/credit card
- **Payment Method:** Select pay method such as Visa, MasterCard or cash
- **Credit Card:** Select from drop down menu credit/debit card previously entered in Credit Cards on customer profile screen
- **Amount**: Enter amount of payment
- **Transaction Type:** Select from drop down menu; Payment, Authorization or Refund
- **Authorization Code:** Enter 0 or authorization code
- **Transaction Code:** Leave blank if obtaining an authorization or enter # if processing payment from an authorization
- **Apply Payment:** Click to process payment
- **Save:** Click to save reservation information

Rentals

This tab is to perform a search for rentals or add new rentals. This is an easier way to search for a customer with their rental information.

Search

This utility allows you to search for an existing rental by # or First name or Last name

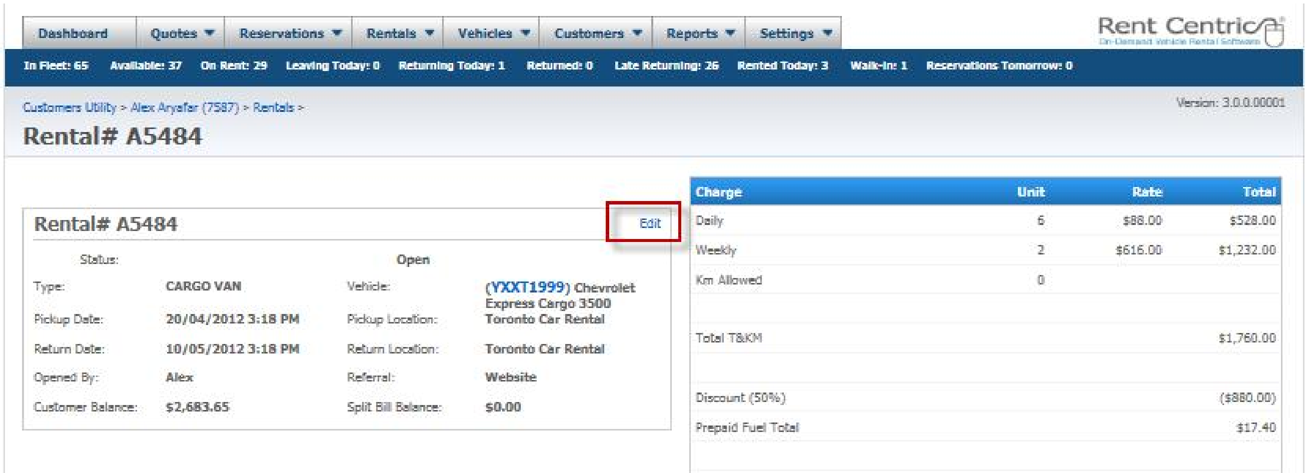
New Rental

- **First Name:** Add renter's first name or click Search to search for customer in your database
- **Last Name:** Add renter's Last name
- **Address:** Add renter's address
- **Phone:** Add renter's telephone #
- **Local Phone:** Add telephone number where renter is currently staying
- **Email:** Add renter's email address
- **Memo:** Add note
- **Driver's Lic.#:** Add renter's license information
- **Date of Birth:** Add renter's date of birth
- **Insurance Co:** Add renter's insurance information, not mandatory
- **Add More Information:** Add more renter information such as SIN or SS# or cell phone #
- **Rental #:** Automatic numbering set up in Location Information from the Settings tab or over ride the field.
- **Pickup Date:** Enter date vehicle is to leave location. You may select date from the calendar or enter in input box. You may select time from clock or enter time in input box
- **X Days:** Enter number of days of rental to auto complete Date In
- **Expected Return:** Enter date of expected return
- **Return Date:** Enter date vehicle actually returned
- **Vehicle Type:** Select Vehicle type from drop down menu
- **Rate:** Select rental rate specific to vehicle type selected
- You may edit rates for this one reservation; not the rental rate
- **Pickup Location:** Select Location Out from drop down menu
- **Return Location:** Select Location In from drop down menu
- **Company:** Enter company name of customer's employer or search companies/corporates database
- **Discount:** Select % or $ and amount of discount, if applicable. Amount will subtract from the rental

- **Discount Reason:** Select discount reason from drop down menu added previously from the Settings tab > Rental/Discount Reason
- **Options:** Select miscellaneous charges and/or insurance coverage
- **Add/Edit Other Charges:** Click to add/edit other charges. Use to add a random charge such as extreme cleaning or enter minus amount (-50 for example) to provide a discount not taxed if entered in other charges
- **Claim #:** Add claim # if rental is insurance replacement
- **PO#:** Add purchase order # if company is paying for rental
- **RO#:** Add repair order # if renter's vehicle is in the shop for repair
- **Vehicle**: Search for a specific vehicle
- **Odometer Out**: System will update based on vehicle selected
- **Estimated KM**: You may add the renter's estimated miles/KM to be driven
- **Fuel Out**: System will update based on vehicle selected
- **Fuel Charge**: Enter amount or system will charge if fuel in is less than fuel out
- **Upgrade Type**: Select rate upgrade type and amount
- **Damages**: Enter amount and check where damages are on vehicle. Amount will add to RA
- **Referral:** Add New referral or select from drop down menu previously added from the Settings tab > Referrals
- **Memo:** Add note
- **Change Reason:** If RA edited please enter reason, extended 1 day for example
- **Customer Notes:** Notes for customer, pick up at airport for example
- **Non-Revenue:** If checked all charges will be reduced to zero
- **Update Charges Summary:** Any items charged will appear here and may be updated if changed.
- **Payment Processing:** If set up to process debit/credit cards in Internet Payment Gateway on the Settings page you may apply a processed payment or add cash payment
- **Swipe:** Swipe the credit/debit card to receive a better transaction charge rate or enter manually
- **Process Credit Card:** Check to process debit/credit card
- **Payment Method:** Select pay method such as Visa, MasterCard or cash
- **Credit Card:** Select from drop down menu credit/debit card previously entered in Credit Cards on customer profile screen
- **Amount**: Enter amount of payment
- **Transaction Type:** Select from drop down menu; Payment, Authorization or Refund
- **Authorization Code:** Enter 0 or authorization code
- **Transaction Code:** Leave blank if obtaining an authorization or enter # if processing payment from an authorization

- **Submit:** Click to process payment
- **Complete and Print Rental:** Click to save rental information

You may click on the blue Rental# on the left to pull up the rental profile screen



- **Edit:** You can click here to edit rental depending on your permission
- **End Rental:** Click to start return process
- **Print Rental/Invoice:** You can simply re-print selected rental contract or invoices.
- **Email Rental/Invoice:** You may email many contracts or invoices
- **Void Rental:** You may void the rental depending on your permission
- **Delete Rental:** You may delete rental depending on your permission
- **Commission:** You may add UserID commission depending on your permission
- **Adjustments:** You may make adjustment depending on your permission
- **Payments/Charges:** This screen allows you to manage payments and charges under rental
- **Bill Split:** Bill Split allows you to split the rental amount between one or more parties. You are able to create a new Bill, select the company who will be sharing or completely paying this bill and enter the amount to create a new split bill between the customer and for example insurance company.
  - **Company:** Select company from drop down menu pulls from Companies/Corporates on Settings page
  - **Claim Type:** Select Renter, 3rd Party or Other if insurance claim for example
  - **Insurance Company:** Add Insurance company if insurance claim or leave blank
  - **Policy Number:** Enter policy number if insurance claim or leave blank
  - **Policy Expiry:** Enter policy expiry date if insurance claim or leave blank
  - **Pre-Paid:** Enter amount if company has prepaid amount
  - Lump Sum: Enter amount of lump sum payment
  - Amount : Enter daily amount lump sum payment

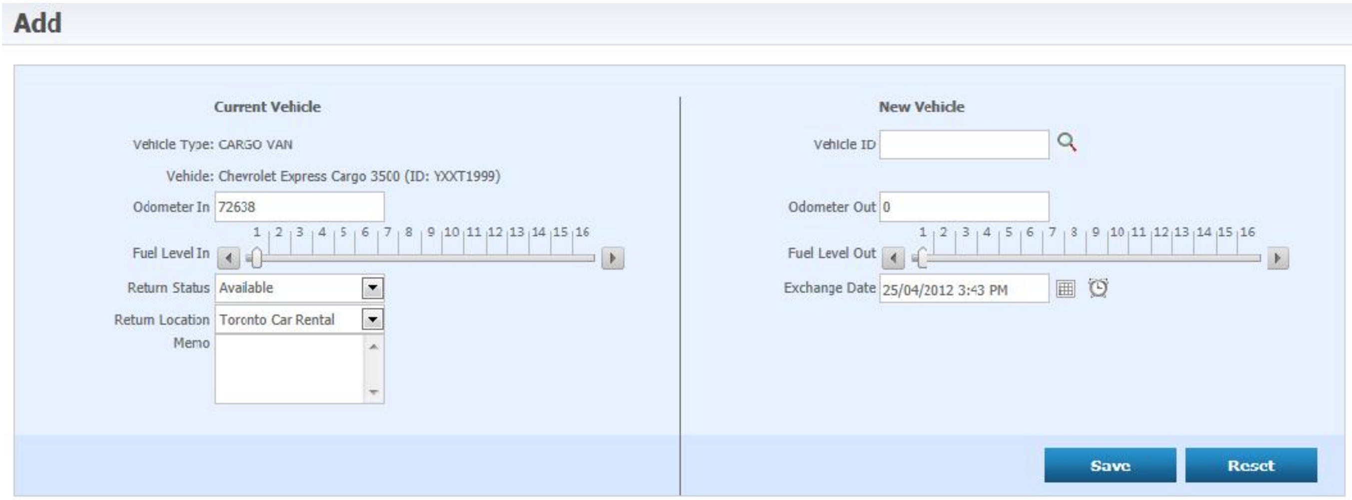
- Adjusters: Select Adjusters name from Company if insurance claim
- Pay Total: Check if company is paying total rental bill
- Memo Add memo
- Insured: Enter Insured name if insurance claim usually renter's name on RA
- RO#: Add repair order #, if applicable
- PO#: Add purchase order #, if applicable
- Loss Date: Enter date of accident if insurance claim
- Claim #: Enter claim # from insurance company
- Max Pay: Enter amount of maximum payment
- Company Pays: Enter % company will pay
- Number Of Days: Enter # of days of rental if "Amount" box is daily amount or 1 if lump sum amount
- Pay All Taxes: Check if company pays all taxes
- Taxes: Check specific tax(es) company will pay

> **Note:** Company must be added from the Settings tab -Companies/Corporates prior to generating a bill split.

- **Additional Drivers:** After you open the rental, you are able to add/edit additional drivers via this screen. You can simply Add New or Search existing customers to add additional drivers.
  - **First Name**: First name of additional driver or new customer
  - **Last Name:** Last name of additional driver or new customer
  - **Address:** Address of additional driver or new customer
  - **City:** City of additional driver or new customer
  - **State**: State of additional driver or new customer
  - **Zip:** Zip/Postal code of additional driver or new customer
  - **Memo:** Note for additional driver or new customer
  - **Phone:** Telephone # of additional driver or new customer
  - **Fax:** Cell or fax # of additional driver or new customer
  - **Email:** Email address of additional driver or new customer
  - **Birthday:** Date of birth of additional driver or new customer
  - **License Number:** Driver's license of additional driver or new customer
  - **License Expiry:** Driver's license expiry date of additional driver or new customer
  - **Country:** Country on driver's license of additional driver or new customer
  - **State:** State/Province on driver's license of additional driver or new customer

- **Traffic Tickets:** Use this utility to manage/add/delete traffic tickets for each customer.
  - To add a Traffic Ticket
    - Click on **New**
    - Enter the **ticket information** into the fields
    - Click **Save**
  - To edit a Traffic Ticket
    - Select the ticket you would like to modify
    - **Edit**
    - **Save**
  - To delete a Traffic Ticket
    - Select the ticket you would like to delete
    - Click 
    - You will be prompted with a deletion confirmation message.
    - Click **Yes** to delete the ticket
  - **Ticket Date:** Date offence occurred
  - **Offence:** What offence is i.e. parking, speeding etc.,
  - **Location:** Location of offence
  - **Amount :** Amount of ticket
  - **Officer:** Police Officer's name on ticket, if applicable
  - **Is Paid:** If paid; it will apply both Credit and Debit. If not paid this will only apply a Debit
  - **City:** City where offence occurred
  - **State:** State where offence occurred
  - **Country:** Country where offence occurred
  - **Memo: Note**
  - **Apply Payments: Check to apply payments**
  - **Process Credit Card: Check to process credit card; select credit card from drop down list**
- **Pickups/Drop-offs:** Enter pickup or drop off information here.

- **Vehicle Exchange:** You can perform vehicle exchanges (swaps) as many times as required. Click Add New. On the left simply enter the incoming (current) vehicle information such as odometer, fuel and status and on the right side, search for the new vehicle or enter the vehicle ID, odometer and fuel will populate automatically and then you can save from this point vehicle on the rental will be the new vehicle entered by the user.



Vehicles

Vehicles menu allows you to search by vehicle id or plate #

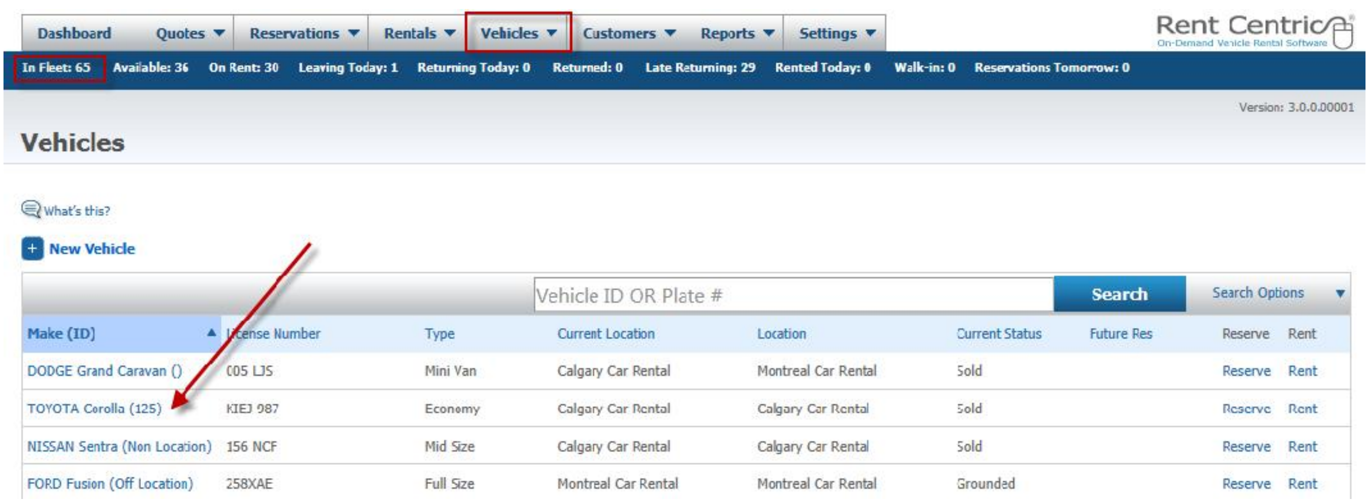
New Vehicle

By clicking on this link you could add a new vehicle to you fleet

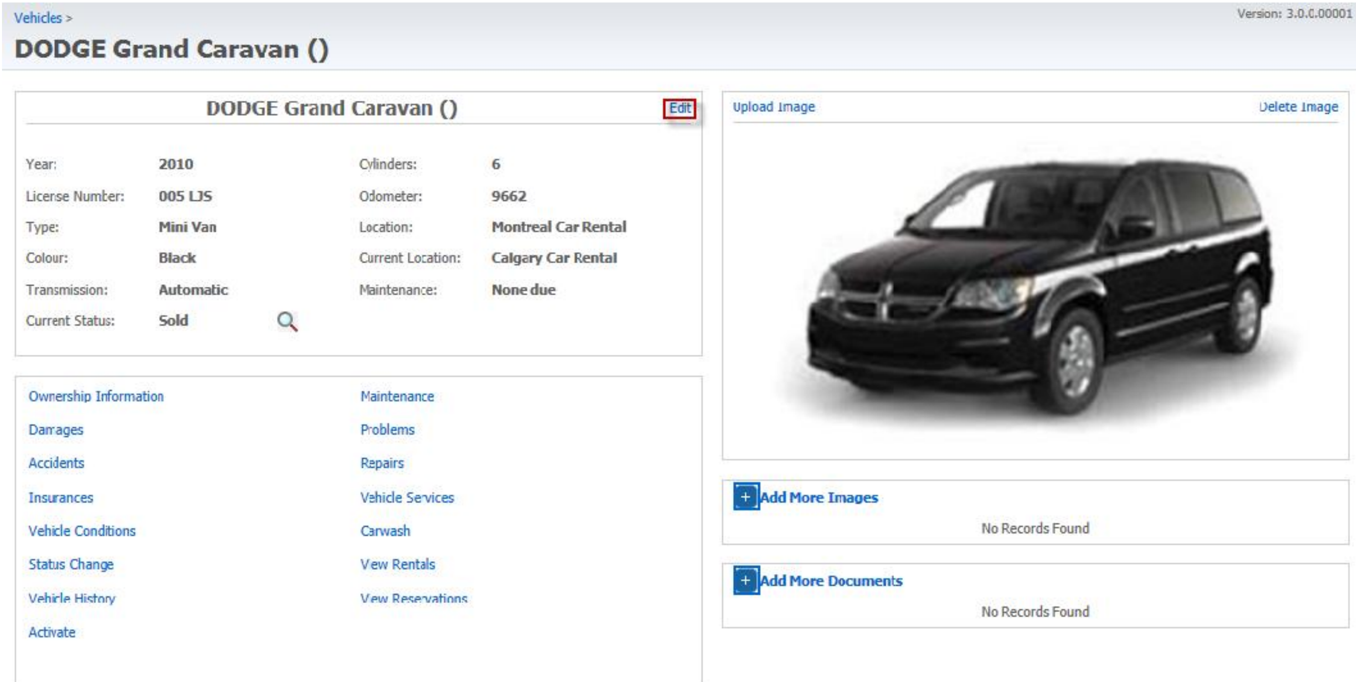
- **Assigned ID:** System will automatically assign a vehicle ID# this may be over written with license plate # or partial VIN
- **Original Odometer:** Odometer reading when vehicle purchased/leased
- **Current Odometer:** Odometer reading of vehicle now
- **Year:** Year of manufacture of vehicle
- **Transmission:** Select Automatic, manual or tip tonic
- **Colour:** Enter color of vehicle
- **Type:** Select vehicle type from drop down menu previously added from the Settings tab
- **Rental Location:** Current rental location of vehicle
- **Owning Location:** Location which owns the vehicle
- **Current Rental/Offsite Location:** Current rental or offsite location of vehicle i.e. LAX airport
- **Fuel Type:** Select from drop down menu Gas or Diesel for example
- **Fuel Level:** Set current fuel level of vehicle. Fuel IN of RA will update this fuel level
- **Maintenance Begin Odometer:** Enter odometer reading when maintenance began
- **Maintenance Every:** Set # of km/miles between maintenance, every 5000 for example
- **Inspection Date:** Enter date vehicle was last inspected
- **License Number:** Enter license plate # or temp
- **License State:** Enter license plate # state/province
- **License Amount:** Enter license plate amount
- **License First Registered:** Enter date vehicle was first registered
- **License Expiry Date:** Enter date license plate expires; system will trigger a pop-up reminder message
- **Dimensions:** Enter dimensions of vehicle
- **Power Train:** Select 4x2 or 4x4
- **Fuel Grade:** Enter grade of fuel preferred, Super for example
- **Front Pressure:** Enter tire pressure
- **Active:** Check for active, available vehicle in your fleet, uncheck to deactivate
- **Spot Number :** # in your parking lot where vehicle is located
- **Make:** Make of vehicle such as Ford

- **Model:** Model of vehicle such as Escort
- **Model Code:** Model Code such as XLT
- **Doors:** Number of Doors on vehicle
- **Cylinders:** Number of cylinders of the vehicles engine
- **Memo:** Note on vehicle
- **Category:** As specified in Vehicle Type
- **Current Status :** Status of vehicle Available or On-Rent for example
- **Body:** Select body of vehicle Car or Truck for example previously added from the Settings tab
- **Tank Size:** Set # of gallons/liters used to calculate Fuel Charge if fuel IN is less than fuel OUT
- **Maintenance Begin Date:** Date regular maintenance starts or has started
- **Insurance Amount:** Enter amount paid for insurance
- **Inspection Amount:** Enter amount paid for vehicle inspection
- **LDW:** Enter amount paid for loss damage waiver
- **VIN:** Enter vehicle identification number
- **Key Number:** Enter number entered on vehicle keys
- **Image**: Upload vehicle image displayed internally only from here
- **Options**: Click option and arrow to load previously entered options

From the Vehicles tab or In Fleet you may click on the blue Make and ID.



This will provide information and access to the specific vehicle.



The following submenus are available on the vehicle profile screen.

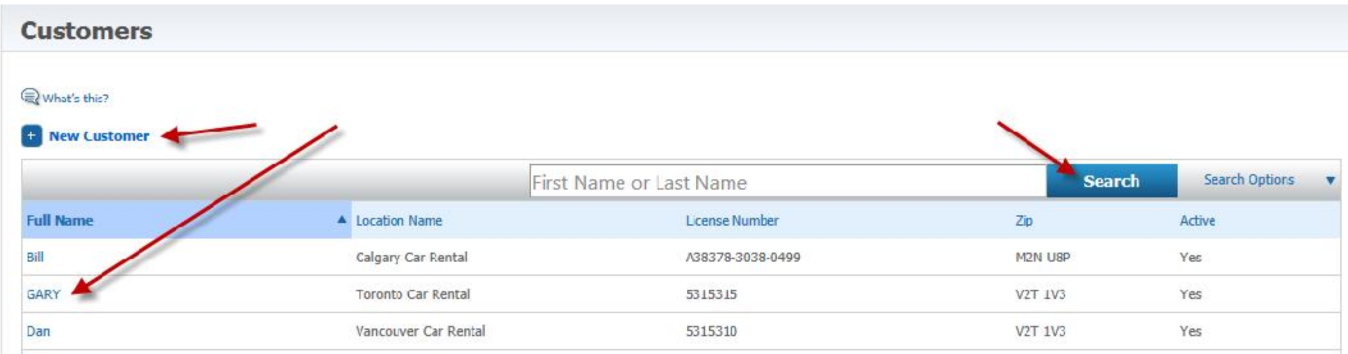
- **Edit:** This screen is used to modify/update and track vehicle specifications. You an also change the vehicle type, location or status.
- **Ownership Information:** This screen is used to modify and update vehicle leasing and sales information
- **Price:** Original price paid for vehicle
- **Buy Back Value:** Amount of buy back value, if applicable
- **Monthly Payment:** Monthly payments for load, if applicable
- **Acquisition Type:** How vehicle was acquired i.e. auction
- **Acquisition Date:** Date vehicle was acquired
- **Acquisition Price:** Price vehicle was acquired for
- **Selling Company:** Company Selling vehicle, if applicable
- **Clean Wholesale:** Wholesale price of vehicle without liens or loans
- **Average auction value:** Average price of similar vehicles sold at auction
- **Owner First Name:** Owner's first name or owning location name
- **Owner Last Name:** Owner's last name
- **Owner Address:** Owner's or location's address
- **Owner City:** Owner's or location's address
- **Owner Zip:** Owner's or location's address
- **Owner State:** Owner's or location's address

- **Owner Phone:** Owner's or location's telephone #
- **Owner Fax:** Owner's or location's fax #
- **Registered Owner:** Select from drop down menu previously entered in Settings
- **Title Comment:** Any comments made on Title document of vehicle
- **Sell Online:** Check if selling online
- **Loan Number:** Loan number, if applicable
- **Bank:** Bank where loan was processed or holding loan, if applicable. Select from drop down menu. Entered in Companies/Corporates with Company Type of "Bank/Finance"
- **Lease Term:** Terms of the lease agreement, if applicable i.e. 5 year term
- **Finance Amount:** Amount of loan
- **Finance Date:** Date loan acquired
- **Interest Rate:** Interest rate on loan
- **Payment Amount:** Monthly payment amount
- **Monthly Depreciation %:** Vehicle Depreciate % i.e. .02
- **Asking Price $:** Asking price if selling vehicle
- **Date Sold:** Date vehicle sold, if applicable
- **Sales Price:** Price vehicle sold for, if applicable
- **Sold:** Retail Wholesale Export Originating Dealer Buyer
- **Buyer:** Person or company who purchased the vehicle
- **Out Of Service Odometer:** Odometer reading when vehicle went or is to go out of service
- **Out Of Service Date:** Date when vehicle went or is to go out of service
- **Balance Owed:** Any outstanding balance owed on vehicle, if applicable
- **Title Location:** Location of title document for vehicle
- **Title Date:** Date title was obtained for vehicle
- **Book Retail:** Retail value of vehicle
- **Book Value:** Retail book value of vehicle
  - **Damages:** Use this screen to enter/modify damages on a vehicle. By looking at the picture on the left hand side you could enter the damage level such as Scratch or bent on the right hand side including the description and total damage amount.
  - **Accidents:** With this screen you could enter and track vehicles accidents and date they occurred.
  - **Insurances:** Lists all insurance coverages for vehicle
- **Vehicle Conditions:** You may check condition of many aspects of vehicle
- **Status Change:** Status may be changed immediately or scheduled
- **Vehicle History:** Shows all edits and/or activation or deactivation on vehicle
- **Activate/Deactivate:** Click to either activate or deactivate the vehicle

- **Maintenance:** This screen allows you to enter and track the maintenance history of a vehicle such as oil service or full service. Every time you enter a new maintenance record you can enter the next maintenance type and odometer and these values will show up in the next maintenance entry.
- **Curent Maintenance Date:** Date maintenance complète
- **Current Maintenance Type:** Type of maintenance i.e. oil change or tire rotation
- **Current Maintenance Odometer:** Odometer reading when maintenance completed
- **Maintenance Shop:** Shop where maintenance was completed such as Jiffy Lube for an oil change
- **Shop Contact Name:** Main contact name at shop
- **Shop Phone Number:** Shop's phone #
- **Labor Cost:** Total labor cost of maintenance
- **Parts Cost:** Amount paid for parts, if applicable
- **Payment Type:** How maintenance was paid for
- **Payment Amount:** Amount paid for maintenance
- **PO#:** Purchase Order #, if applicable
- **Memo:** Notes
- **Future Maintenance Reminder:** System will auto-complete date 3 months in to the future, you may adjust this date
- **Future Maintenance Type:** Enter maintenance type such as oil change
- **Future Maintenance Odometer:** System will automatically enter based on current odometer reading plus maintenance interval settings. Field may be over written
- **Problems:** This is screen is used to log the vehicle problems.
- **Problem Date:** Date problem occurred
- **Odometer:** Odometer reading when problem occurred
- **Status:** Current status of vehicle, i.e. Out of Service
- **Description:** Description of vehicles problem, i.e. squeaky fan belt
- **Repairs:** Use Repairs screen to enter and track the repair orders. Always enter the total cost and labor to have accurate reporting.
- **Vehicle Services:** You may add a company for example vehicle GPS tracking company.
- **Carwash:** Enter your carwash activity with this screen. You can enter carwash information such date and odometer the car was washed at.
- **View Rentals:** View rental history
- **View Reservations:** View reservation history
- **Upload/Delete Image:** You can upload/delete actual vehicle images for the vehicle.
- **Add More Images:** You may upload more images
- **Add More documents:** You may upload documents such as Vehicle Specs

Customers

Customers menu allows you to search/add/modify Customers and perform different actions on them such as starting a rental. By clicking on Customers Menu you will have the option to either search for a customer, add new customer or click on the blue active link of their name.



New Customer

Use this screen to add new customers to the system.

- **First Name**: Enter your customer's first name
- **Last Name:** Enter your customer's last name
- **Address 1:** Enter your customer's address
- **Address 2:** Enter additional address information, if required
- **City:** Enter your customer's city of residence
- **State:** Enter your customer's state or province of residence
- **Zip**: Enter your customer's zip or postal code
- **Country:** Enter your customer's home country
- **Phone:** Enter your customer's home telephone number
- **Local Phone:** Enter your customer's local telephone number
- **Email :** Enter your customer's email address
- **Customer Notes:** Enter notes
- **Driver's License Number**: Customer's driver's license #
- **License State:** Customer's driver's license state or province
- **License Country:** Customer's driver's license country
- **Are you licensed to driver a motorcycle?:** Select Yes or No from drop down menu
- **Date of Birth:** Customer's date of birth
- **License Expiry:** Customer's driver's license expiry date
- **Insurance Company**: Customer's insurance company name

- **Policy Number:** Customer's insurance policy number
- **Insurance Expiry:** Customer's insurance policy expiry date
- **Insurance Phone:** Customer's insurance company's telephone number
- **Insurance Fax:** Customer's insurance company's fax number

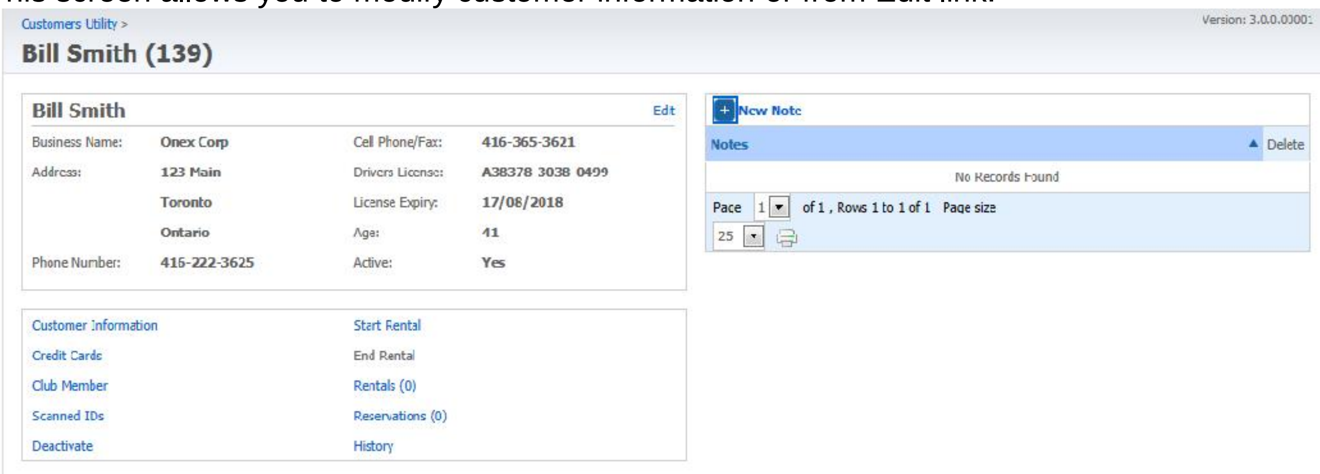
More Info

- **Gender:** Select Male or Female from drop down menu
- **Title:** Select Mr., Mrs., Ms, Miss, Dr, Prince or Shk from drop down menu
- **Source Of Referral:** Enter referral of where your customer's business came from, internet for example
- Undesired Active Preferred Check one or more
- **SSN/SIN**: Social security number or social insurance number
- **Cell/Fax:** Cell or fax numbers
- **AAA Membership Number:** American Automobile Association membership number, if applicable
- **Policy Number:** Customer's insurance policy number
- **Approved By:** The name of the person approving the information provided
- **Agent:** Customer's insurance company's agent's name
- **Job Position:** Customer's job title
- **Band Name:** Customer's band name, if applicable
- **Tax ID:** Tax ID# if tax exempt
- **Password:** Password established by customer to allow release of private information
- **Preferred Body:** Preferred vehicle body type, if applicable
- **Company/Corporate:** The company where the customer is employed from drop down menu
- **Company Phone:** Company/Corporate's phone #
- **Employer Name:** The company where the customer is employed
- **Employer Email:** Customer's employer's email address
- **Employer Address:** Customer's employer's address
- **Employer City:** Customer's employer's city
- **Zip/Postal Code**: Customer's employer's zip or postal code
- **Employer Fax:** Customer's employer's fax number
- **State/Province:** Customer's employer's state or province
- **Region:** Region to which customer may be assigned
- **Frequent TravelerID:** Frequent traveler ID #, if applicable
- **DBA Name:** Doing business as name, if applicable

- **Entered Location:** Select Location customer originally added to
- **Undesired:** check if you do not wish to rent to customer again; leave active
- **Active:** Customer will pull up from customer search
- **Preferred:** check if preferred customer
- **Unsubscribed from Email Marketing:** Check if customer does not want to receive email newsletters etc.,

Customer Information

This screen allows you to modify customer information or from Edit link.



Use this screen to add new customers to the system.

- **First Name**: Enter your customer’s first name
- **Last Name:** Enter your customer’s last name
- **Address 1:** Enter your customer’s address
- **Address 2:** Enter additional address information, if required
- **City:** Enter your customer’s city of residence
- **State:** Enter your customer’s state or province of residence
- **Zip**: Enter your customer’s zip or postal code
- **Country:** Enter your customer’s home country
- **Phone:** Enter your customer’s home telephone number
- **Local Phone:** Enter your customer’s local telephone number
- **Email :** Enter your customer’s email address
- **Customer Notes:** Enter notes
- **Driver’s License Number**: Customer’s driver’s license #
- **License State:** Customer’s driver’s license state or province
- **License Country:** Customer’s driver’s license country

- **Are you licensed to driver a motorcycle?:** Select Yes or No from drop down menu
- **Date of Birth:** Customer's date of birth
- **License Expiry:** Customer's driver's license expiry date
- **Insurance Company**: Customer's insurance company name
- **Policy Number:** Customer's insurance policy number
- **Insurance Expiry:** Customer's insurance policy expiry date
- **Insurance Phone:** Customer's insurance company's telephone number
- **Insurance Fax:** Customer's insurance company's fax number

More Info

- **Gender:** Select Male or Female from drop down menu
- **Title:** Select Mr., Mrs., Ms, Miss, Dr, Prince or Shk from drop down menu
- **Source Of Referral:** Enter referral of where your customer's business came from, internet for example
- Undesired Active Preferred Check one or more
- **SSN/SIN**: Social security number or social insurance number
- **Cell/Fax:** Cell or fax numbers
- **AAA Membership Number:** American Automobile Association membership number, if applicable
- **Policy Number:** Customer's insurance policy number
- **Approved By:** The name of the person approving the information provided
- **Agent:** Customer's insurance company's agent's name
- **Job Position:** Customer's job title
- **Band Name:** Customer's band name, if applicable
- **Tax ID:** Tax ID# if tax exempt
- **Password:** Password established by customer to allow release of private information
- **Preferred Body:** Preferred vehicle body type, if applicable
- **Company/Corporate:** The company where the customer is employed from drop down menu
- **Company Phone:** Company/Corporate's phone #
- **Employer Name:** The company where the customer is employed
- **Employer Email:** Customer's employer's email address
- **Employer Address:** Customer's employer's address
- **Employer City:** Customer's employer's city
- **Zip/Postal Code**: Customer's employer's zip or postal code
- **Employer Fax:** Customer's employer's fax number

- **State/Province:** Customer’s employer’s state or province
- **Region:** Region to which customer may be assigned
- **Frequent TravelerID:** Frequent traveler ID #, if applicable
- **DBA Name:** Doing business as name, if applicable
- **Entered Location:** Select Location customer originally added to
- **Undesired:** check if you do not wish to rent to customer again; leave active
- **Active:** Customer will pull up from customer search
- **Preferred:** check if preferred customer
- **Unsubscribed from Email Marketing:** Check if customer does not want to receive email newsletters etc.
-
- **Credit Cards:** Lists credit cards in system click Add New to add a new credit card
- **Club Member:** Lists Club card # and expiry information
- **Scanned IDs:** You may upload scanned ID’s or documents
- **Deactivate/Activate:** Deactivate or reactivate customer
- **Start Rental:** Start new rental
- **End Rental:** Close currently open rental
- **Rentals:** Lists previous rentals
- **Reservations:** Lists previous reservations
- **History:** Lists customer history

To add a Note

1. Click on +
2. Enter note
3. Click **Save**

To edit a Note

1. Click on **blue note link**
2. Modify the note and click **Save**

To delete a Note

1. Click ✕

Reports

Reports are designed to allow you monitor your business accurately. All reports are web-based and viewable online through a web browser.

You need to download the report viewer to view the reports. Simply click on the link provided on reports page and download the report viewer.

If any complete or partial value is provided the report is narrowed down to the specified value. For example if you are generating customer list, if you enter bill for first name, the report will generate all customer with bill as their first name.

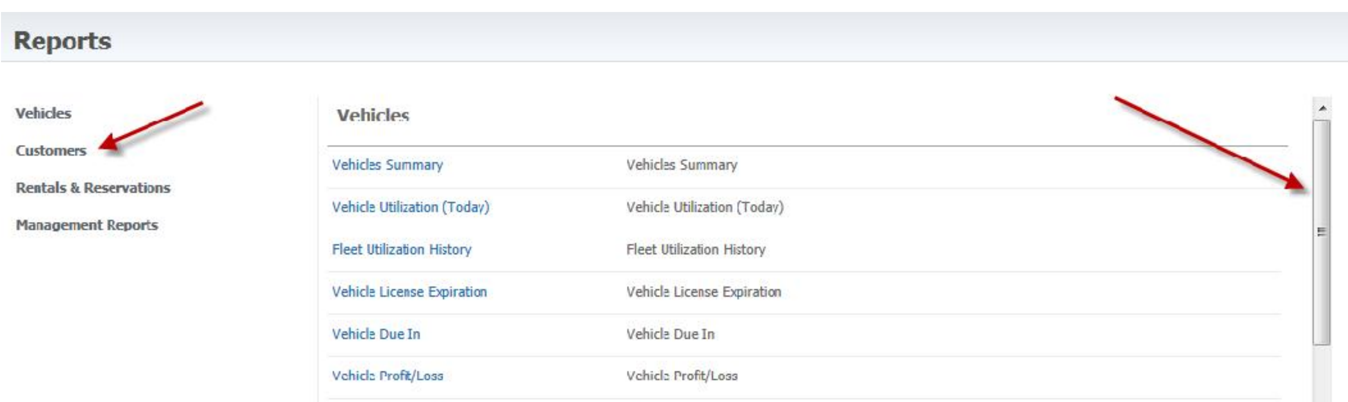
All reports are exportable to the following formats:

1. Excel
2. Word
3. Rich Text
4. PDF

To export a report

- Generate a report
- Click on the export button on the report screen
- Select the format.
- Click OK

The Reports tab is broken down in to 4 segments you may click on one specific area or scroll down the list to find the report you would like to run.



Vehicles

- Vehicle Summary: Reports vehicle information including current odometer reading, VIN and vehicle type
- Vehicle Utilization (Today): Reports fleet utilization for the current day

- Fleet Utilization: Provides information on # of rentals, dates rented and % of utilization. You may filter by vehicle make, model, type, location and date range.
- Vehicle License Expiration: Provides a list of vehicle license expiration with in the date range selected. You may filter by vehicle make, model , type, status or location
- Vehicle DueIn: Provides a list of vehicles due in from a rental with in the date range selected. You may filter by vehicle make, model , type or location
- Vehicle Profit/Loss: Provides a list of profit or loss for your fleet. Revenue less expenses and depreciation. You may filter by date range, vehicle make, model, type, status or location
- Fleet Utilization Chart: Provides a line graph of fleet utilization based on date range and vehicle type.
- Repair Orders: You run a report of RO#'s added to RA's
- Vehicle Repairs: Provides a list of repairs including shop, parts and labor charges. You may filter by date range, vehicle make, model , type or location
- Vehicle Lease/ Loan: Reports detailed ownership information such as Acquisition type, date, Loan #, bank and terms.
- Vehicle Maintenance: Provides a list of vehicle maintenance due within the date range selected. Information includes Shop, maintenance type such as oil change and amount
- Vehicle Maintenance Alert: Provides a summary of up coming maintenance with KM/Mileage until maintenance is due
- Snap Shot.: Over all view of rentals per vehicle type
- Vehicle Insurance: Provides a summary by Vehicle ID as to what type of coverage the vehicle has such as liability Only or Full Coverage
- KM Difference/Missing: Provides a list of RA's with Odometer Out/IN and difference grouped by Vehicle ID for a selected date range

Customers

- **Customer List:** Provides a list of all customers or customer's birth dates with in a selected date range
- **Customer By Region:** Provides a list sorted by region if customer placed in regions
- **Traffic Tickets:** Provides a list of RA's where traffic tickets have been added and whether they are paid
- **Source of Referral:** Provides a list of RA's where a referral has been entered for a selected date range. List sorted by referral
- **Payments & Charges:** Provides a list of Payments & Charges sorted by payment method, AmEx for example
- **Customer Notes:** Provides a list of notes made to a customer and when they were entered in the system
- **Customers Undesired:** Provides a list of customers flagged as "Undesired"

Rentals & Reservations

- **Rental Status:** Provides list and pie chart of the status of RA's with in a selected date range
- **Vehicle Rental Calendar:** Provides a bar graph of RA's based on date range selected
- **Corporate A/R By Bills:** Provides an aged list of bill split invoices generated for companies may be filtered to age or balance owing
- **Customer A/R Report:** Provides a list of RA's with Res# may be filtered to balance owing, zero balance or all
- **Reservation A/R by Bills:** Provides a list of bill split invoices generated for companies on a reservation may be filtered to balance owing
- **Corporate A/R Analysis:** Provides a list of Corporate accounts receivable split in to aged columns, 30 day, 30-60 day columns
- **Fleet Grid:** Provides a summary grid of Fleet count, on rent, Res Out and a number of items including what's available for each day of your selected range
- **Custom Reports:** Any report you have developed will be located here
- **Reservations:** Provides a list of reservations with dollar amounts based on date range, make, vehicle type or status
- **Reservation Manifest:** Provides a list of reservations based on date range, make, vehicle type or status
- **Reservation Forecast:** Provides a grid for each vehicle type of In fleet, booked and expected returns for date range selected
- **Reservation Grid:** Provides a grid of In fleet, Res Out, On Rent and Due In for selected date range
- **Reservations No Showup/Cancelled:** Provides a detailed list of reservation information of reservations not honored for a selected date range
- **Reservations Calendar:** Provides a bar graph of Reservations with Vehicle ID for selected date range
- **Dynamic Scheduler:** Provides a bar graph of rentals and reservations for a selected date range. Reservations may be moved to a different vehicle making way for a longer rental/reservation; information will automatically update on moved reservation
- **Visual Scheduler:** Provides a bar graph of rentals and reservation for a selected date range.

Management Reports

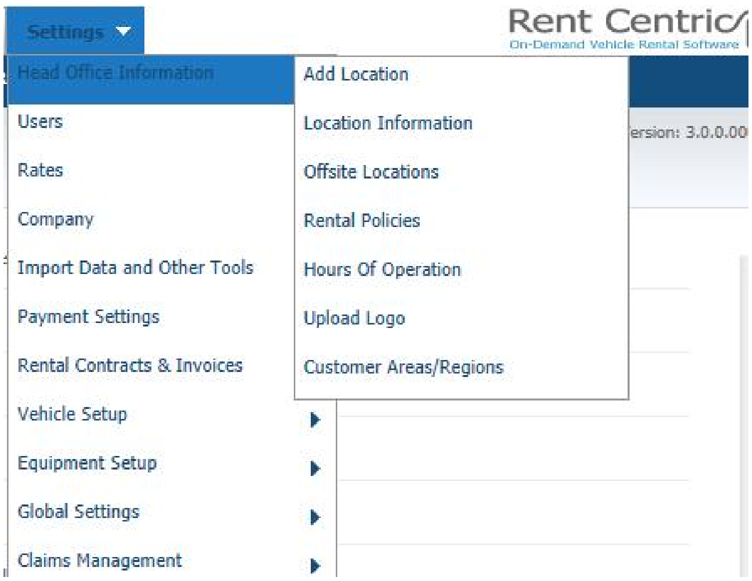
- **Daily Business Report:** DBR lists RAs closed with in date range selected summarizing revenue, MiscCharges and taxes
- **Daily Cash Summary:** Reports payment methods received in a selected date range sorted by payment method
- **Month To Date:** Report summarizes revenue and breaks down items sold with in MiscCharges, Insurances and taxes for example for selected month

- **Rentals:** Provides a list of rentals for selected date range. Sorted by UserID subtotaling several categories such as insurance sold.
- **Event Tracking:** Provides a report of system events based on UserID or keyword for a selected date range. For example you may track what UserID m@rc.com has done for the past day or week.
- **Rental Event Tracking:** Search for system activity for rentals
- **Reservation Event Tracking:** Search for system activity for reservations
- **Tasks:** Provides a list of tasks generated with in a selected date range may be filtered by subject name
- **Commissions:** Provides a list of RA's with commission amounts if UserID set up with commission payment
- **Sales Projection:** Provides a list of RA's with Location and amount information
- **Work In Progress**: Provides a list of open RA's sorted by UserID
- **Revenue by Customer:** Provides a list of RA's sorted by All or a specific customer as specified by filter and date range
- **Revenue by Vehicle:** Provides a list of RA's sorted by All or a specific vehicle as specified by filter and date range
- **Revenue by Location:** Provides a list of RA's sorted by All or a specific location as specified by filter and date range
- **Revenue by Rates:** Provides a list of RA's sorted by All or a specific rental rate as specified by filter and date range
- **Revenue by User:** Provides a list of RA's sorted by All or a specific rental rate as specified by filter and date range
- **Revenue by Company:** Provides a list of RA's sorted by All or a specific company as specified by filter and date range
- **Non-Revenue:** Provides a list of RA's where "Non-Revenue" has been checked for a selected date range
- **Revenue by Options:** Provides a list of RA's sorted by All or a specific option as specified by filter and date range

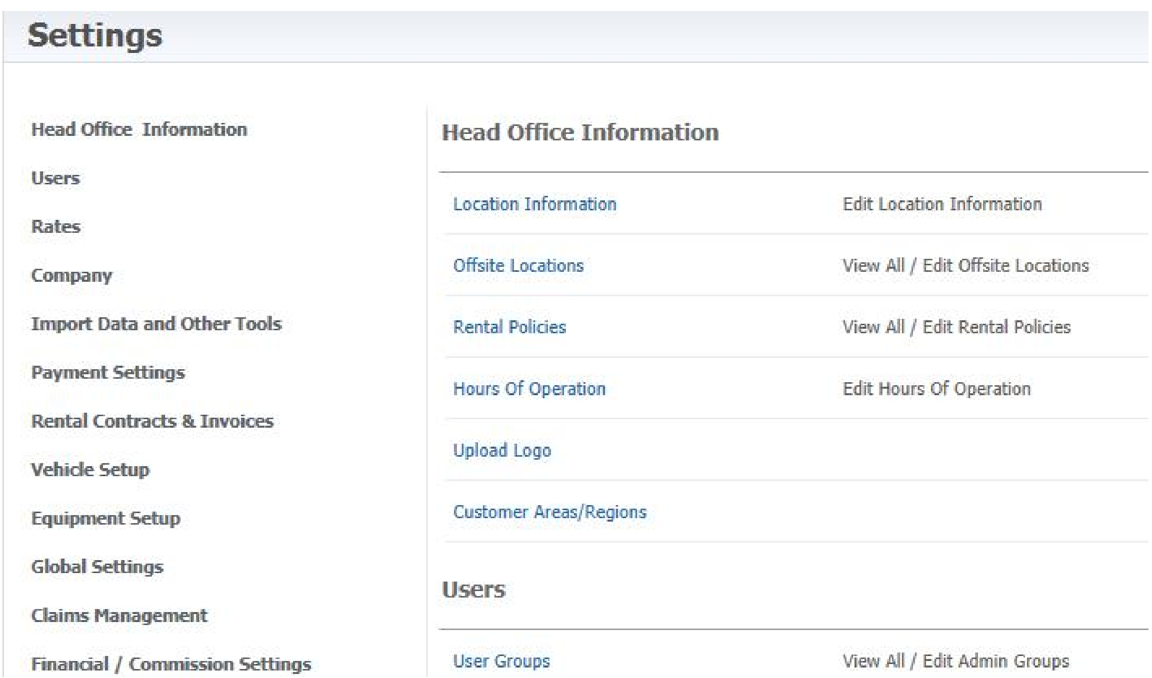
Settings

The Setting utilities are designed specifically for system users to manage multiple locations, rates and other specific settings. In order to change any location setting click on Settings and from there you have access to all setup pages.

The main menu and sub-menus allow you to access a specific area for input or edit.

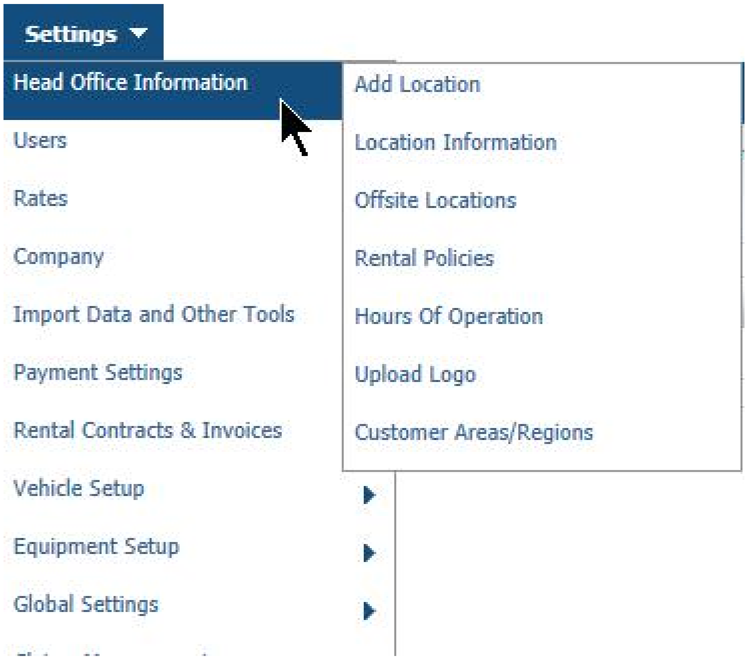


By clicking on the Settings tab you may see the list as a menu down the left hand side



Head Office Information

This option allows you to add/modify different locations and their individual settings.



To add a Location

1. Hover cursor over Settings > Head Office Information > Add Location
2. Fill out the location Information form (See “Location Information Fields” under the Location Section for details)
3. Click Save

The Location Settings main screen will display. Please see the Location Settings Menu section for more details on these options.

To modify a Location

1. Switch to the location to edit from the upper right hand corner

2. Hover cursor over Settings > Head Office Information > Location Information.
   - Please see the Location Information section for more details on these options.

Location Information

Allows you to edit/add information on for the location you are currently in

- **Information:** This section contains the main information on a location, such as address, phone numbers and location contact.
  - **Location Name:** Operational name of location this name will print on contract
  - **Location Code:** May be initials of location, your selection. Prints on some reports
  - **Contact Full Name:** Full name of contact at this specific location

- **Address:** street address of location
- **City:** City of location
- **State/Province:** State/Province of location
- **Zip/Postal:** Zip/Postal code of location
- **Email:** Email address of location
- **Country:** Country in which location is located
- **Closest Intersection:** Street intersection of location
- **Closest Airport:** Airport closest to location
- **Phone:** Phone number of location
- **Fax:** Fax # of location
- **Toll Free Number:** Toll Free # of location, if any.
- **Legal Name (D.B.A.):** Legal Name of business. (Doing Business As)
- **GST/TaxID #:** Tax ID # or HST #
- **Memo:** Note

▪ **Settings:** This section allows you to modify or update each location individual setup and parameters.

- **Location Time Zone:** Select your correct time zone where the rental location is located in order to accurately display the time on rentals and reservations or any event that happens in the system.
- **Date Format:** Select your local date format and everything which displays a date in the system including .your calendars will show your local date format
- **Currency:** Select the correct currency for your business all currency will be formatted with the currency of choice.
- **Local Currency:** You can enter a local currency with its exchange rate in order to run some of reports for your local government. For example in Mexico the advertized rental rates are in US Dollars but they are required to report income tax in Mexican Pesos. In this example user enters Mexican Pesos as local currency with the latest exchange rate so the system would convert the US Dollars X Exchange rate and display the value in Mexican Pesos including the symbol on the reports required for government. Please note the system goes with the exchange rate which was valid with the transaction date. For example if user enters an exchange rate for 10 Mexican Pesos for 1 US dollar on December 1st and then enter 11 Mexican Pesos for 1 US Dollar in December 5th then if you run the report for transaction which happened on December 2nd the exchange rate will be 10 Mexican Pesos and if you run the report for December 6th exchange rate will be 11 Mexican Pesos.
- **Language:** Choose the default location language for user information.
- **Region:** This field is used for one way setup which allows you to assign your locations to regions in your one way table (please refer to one way configuration for more information)
- **Industry:** By selecting your correct industry the software will display industry related information in various sections of the system such as damages of vehicle and vehicle specifications.

- **One Way:** Select One Way charge type if more than one location or disable
- **Driver's Min Age/Underage:** This field specifies minimum driver's age required to open a rental at time of checkout. System will prevent opening a rental if minimum age is not met. You can also enter an underage Misc Charge and at the Misc Charge setting check ON the underage check box so the misc charge would be applied automatically to the rental when a driver is underage.
- **Temperature Unit:** Select either Celsius or Fahrenheit
- **#Days in Month:** Specify number of days in month for the daily rate to switch to monthly rate.
- **Odometer Indicator:** Select the indicator based on your region for KM or Mile.
- ☑ **Signature Pad:** Click on this option to enable capturing client digital signature at checkout screen if you have Topaz Signature Pad Device.
- **Copy Location on Reservation Emails:** Check if location is to receive a copy of reservation confirmation emails sent to customer
- **Enable Corp Rate:** Check this field ON to enable filtering rates by selected Company at time of generating quote, reservation or checkout. Note if you enable this feature, you will not obtain any rates if selected company does not have any rates setup under their profile.
- **Enable Online Booking for this Location:** Allows this location to present vehicles and accept online reservations from the link provided in Web Customer.
- ☑ **Active:** Check this option to activate the location. If not activated, the location will not show up in any sections of the application.
- **Charge Per Mile:** This field is the location wide extra driven mileage or KM charge for excess driven mileage. You can override this value when setting up rates.
- **Reservation, Rental, Daily Business Report, Quote and PO Number:** Enter the starting sequence number for these items in the software. You can enter numbers only or mix of word and numbers such as LAX0001.
- **Mileage Buffer:** Set miles allowed outside location area
- **Diesel Prepaid Fuel Rate:** Enter fuel rate for prepaid fuel option at checkout process**.** Note this rate is usually lower than Convenience refueling rate.
- **Latitude and Longitude:** this field will be used to pin point your location on maps displayed in the software
- **Location Weather ID:** Click on the link to find your location and enter the correct weather ID for displaying weather information on online reservation website.
- **Convenience ReFuel Rate:** Enter the fuel charge price when customers return the vehicle with fuel in less than fuel out.
- **Diesel Convenience Refuel Rate:** Depending on vehicle fuel type, gas or diesel, the fuel numbers you enter will be used for calculating the fuel charges. For example if you enter $1.00 for pre-paid fuel and your vehicle tank size is 40 liters, if the tank comes back empty system will charge 40 x $1.00 = $40.00 for fuel. This feature works with both liters and gallons.
- **Quote Expires After:** Enter number of days or 0

- **Website:** Enter your website address, if applicable.
- **No Show Grace Minutes:** Enter number of minutes you will allow your renter to be late for a reservation
- **Prepaid Fuel Rate:** Enter unit amount for prepaid fuel

Offsite Locations

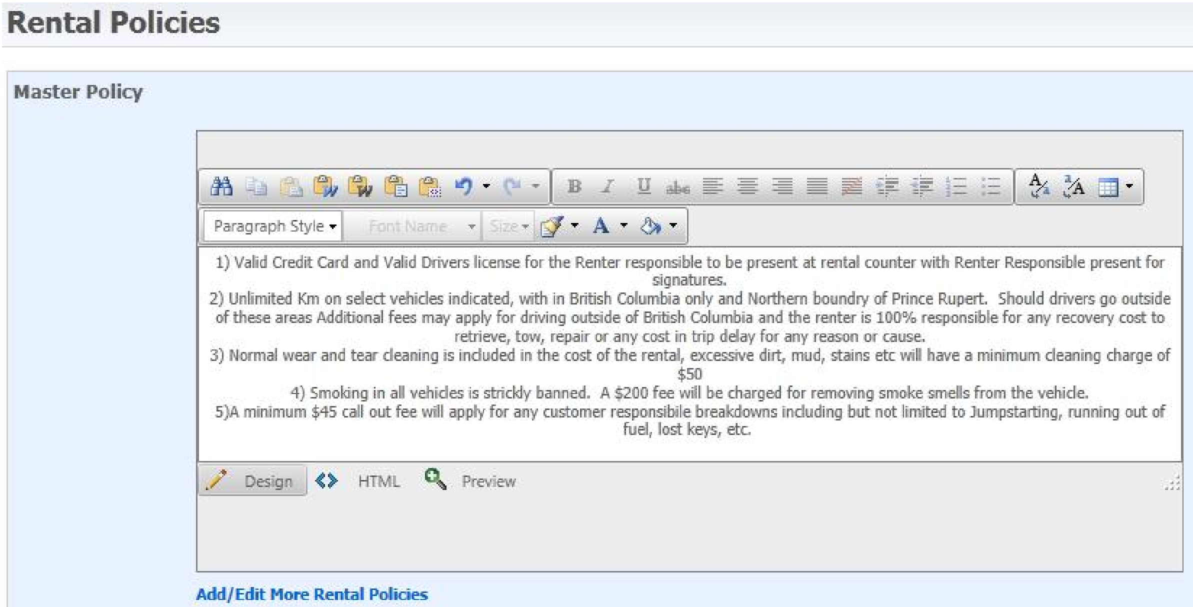
Offsite locations are often used for adding additional depot or locations which are not full locations and are used just for tracking your fleet.

New Offsite Location

- Location Name: Location Name or Airport counter for example
- Code: Initials of location or airport code your selection
- Contact Name: Contact Name at offsite location
- Address: Street Address of offsite location
- City: City of offsite location
- State/Province: State/Province of offsite location
- Country: Country of offsite location
- Phone: Phone # of offsite location, if applicable
- Fax: Fax # of offsite location, if applicable
- Email: Email address of offsite location, if applicable
- Region: Select from drop down menu added from Settings > Head Office > Customer Areas/Region
- **Latitude and Longitude:** this field will be used to pin point your location on maps displayed in the software
- Hours of Operation: Hours during which the business is open
- Memo: Note
- Is Active: Check if offsite is active and available for selection throughout the system
- Use One Way: Check if one way rentals will be permitted

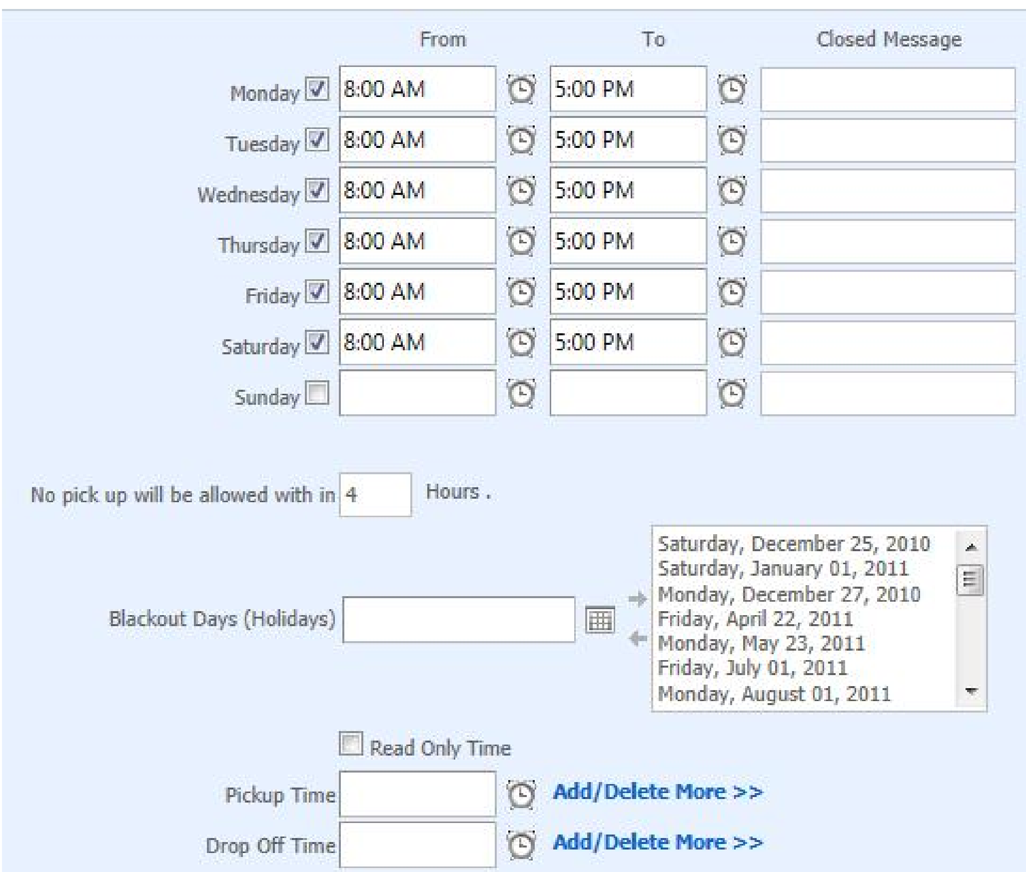
Rental Policies

Enter your master policy or add more policies from this screen.



Hours of Operation

Enter location's hours of operation by checking ON the day of the week when location is open and entering the start and end business hours.



- No pickup will be allowed with in X hours will ensure no one will book a vehicle on your website X hours prior to pick up. For example if you like your first reservation to be in two days from now, simply enter 48.
- **Black out Days**
  Enter the holidays on your calendar when the car rental is closed for business so your clients will not be able to pickup or drop off on those days.

Upload Logo

Click here to upload your location logo which will appear on the top, right side of your software and also on your contract, reservation, quote printouts.

Customer Areas/Regions

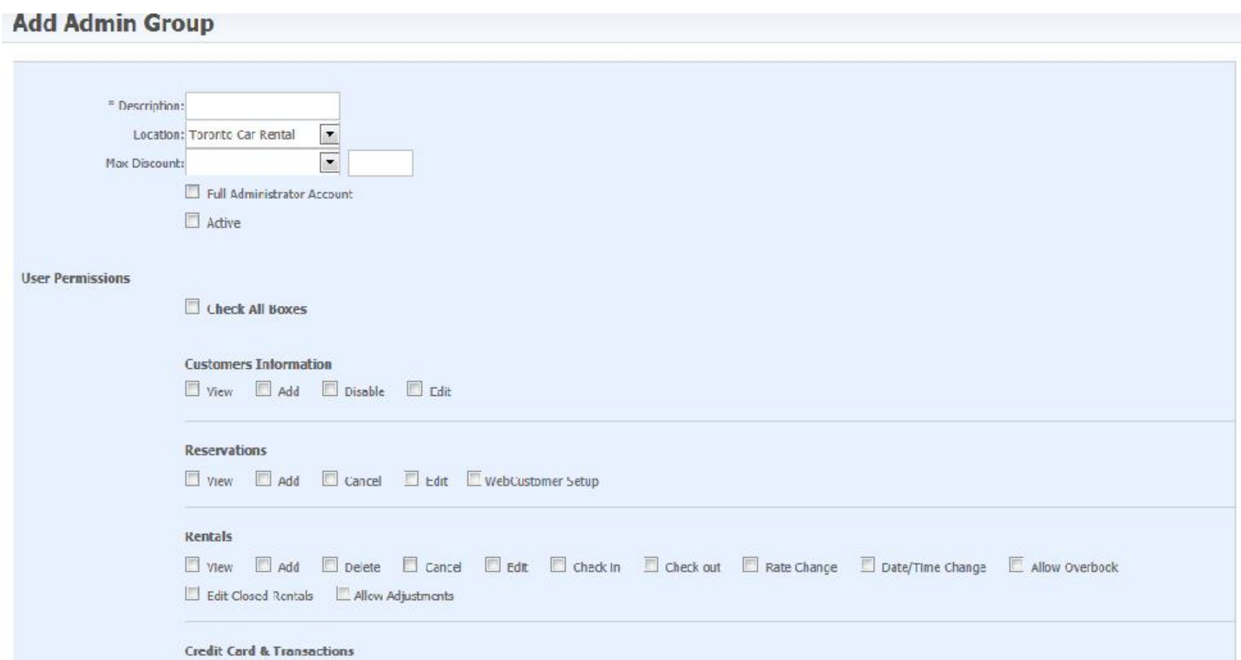
For one way setup per region enter regions. They can be any name you wish North, South or City

Users

User Group

In order to make adding new users easier, you can set User groups with certain permissions and while adding new users, you can select the user group to automatically pre-populate permissions.

- **User Group: U**sed pre-populated permissions.



- **User Permissions:** With checking permissions ON/OFF you can enable or disable access to certain functionalities within the system for individual users.

- **Customers Information:** Information of your renter such as name, address, telephone and credit card #'s
  - View Add Disable Edit : Allows UserID to view, add or edit customer information or disable/deactivate customer
- **Reservations**
  - View Add Disable Edit : If checked allows UserID to view, add, disable or edit a reservation
  - Web Customer Setup: If checked allows UserID to Web Customer set up; please see tip on Settings tab > Webcustomer
- **Rentals**
  - View Add Disable Edit: If checked allows UserID to edit any and all information related to the transaction
  - End Rental: If checked allows UserID to end a rental
  - Start Rental: If checked allows UserID to start a rental
  - Rate Change: If checked allows UserID to edit rental rates a rental
  - Date/Time Change If checked allows UserID to edit date/time on a rental
  - Allow Overbook: If checked allows UserID overbook a vehicle; open / close dates overlap
  - Edit Closed Rentals: If checked allows UserID to edit a closed rental
- **Credit Card & Transactions**
  - View Credit Card: If checked allows UserID to view renter's credit card information
  - Process Credit Card : If checked allows UserID to process a payment on the renter's credit card
  - Refund: If checked allows UserID to process a refund on the renter's credit card
  - Delete Transactions: If checked allows UserID to delete entire transaction
  - Edit Transactions: If checked allows UserID to edit any and all information related to the transaction
  - Void Transactions: If checked allows UserID to void entire transaction
- **Rates Setting**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or rental rates
- **Insurances Setting**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit insurance rates
- **Miscellaneous Charges Setting**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit miscellaneous charges
- **Locations Setting**

- View Add Disable Edit: If checked allows UserID to view, add, disable or edit location information

- **Menu tool bar**
  - If checked allows UserID access to tabs on the top tool bar
  - **Reports:** If checked allows UserID access to Reports tab on the top tool bar
  - **Settings**: If checked allows UserID access to Settings tab on the top tool bar
  - **Management Reports:** If checked allows UserID access to Management Reports from Reports tabs on the top tool bar
- **Rental/Invoices Forms**
  - View Add Disable Edit : If checked allows UserID to view, add, disable or edit rental/invoice forms
- **Claims Management Section**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit a claim
- **Company Settings**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit companies/corporates
- **Corporate Rates**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit corporate rates
- **Bill Split Settings**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit a bill split on rental
- **Vehicles Management**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit vehicles management
- **Vehicle Maintenance**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit vehicle maintenance such as oil changes etc.
- **Vehicle Repairs**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit vehicle repairs
- **Repair Orders**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit repair orders
- **Vehicle Problems**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit vehicle problems
- **Vehicle Carwash**

- View Add Disable Edit: If checked allows UserID to view, add, disable or edit vehicle carwashes

- **Vehicle Damages**
  - View Add Disable Edit: If checked allows UserID to view, add or edit vehicle damages
- **Vehicle Accidents**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit vehicle accidents
- **Update Vehicle Location**
  - If checked allows UserID to move vehicles from one location to another
- **Users**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit Users
- **Commissions**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit commission set up on RA or reservation
- **Reports**
  - Check to all access to report
- **Notes Settings**
  - Add Delete Edit notes in system
- **Traffic Tickets**
  - View Add Disable Edit: If checked allows UserID to view, add, disable or edit traffic tickets
- **Seats**
  - View Add Disable Edit: if checked allows UserID to view, add, disable seat; this option for per user license only
- **Location Access**
  - If checked allows UserID access to "All" or only selected locations
  - If you have multiple locations, you are able to grant access to multiple locations for each user. This will add selected locations to the location drop down under menu bar.

Add User

This screen allows you to add employees to your system and giving them access to logon to the system. You can define permissions for each specific user which gives you a greater flexibility to control your employees. For example if you uncheck the Insurances View permission checkbox, that user will not be able to modify any insurance settings.

- **User ID:** Username set up in email address format
- **Password:** The Password can be changed at any time. The next log in will require the new password.
- **Confirm Password:** Retype same password

- **Full Name:** Name of UserID, user or employee
- **Title:** CSR, Rental Clerk or Manager for example
- **Commission Amount:** Amount of % or $ from commission type.
- **Full Administrator Account**
  Select this option if you are granting the full administrator rights to the user. This will allow the user to view all locations in the system.
- If not selected (highly recommended) the user will only be able to view their location information and settings.
- **Active**
  Check this option to activate the User. If not activated, the user will not have the ability to login to the system.
- **Language:** Sets the language for this user. If you are interested in other languages, please contact us at support and we will provide you with the translation sheet to update the system.
- **Theme:** To personalize your system skin and floors choose different display themes
- **Location:** Select location from drop down
- **Commission Type:** Commission paid to your User ID or employee based on % or $.
- **User Group:** Select permission template saved in User Group
- **Max Discount:** The maximum discount your User ID may select on a rental or reservation.
- **Commission Structure**: Select a commission structure which applies to this user. (To Manage Commission Structure please refer to the section in this manual)

Edit User

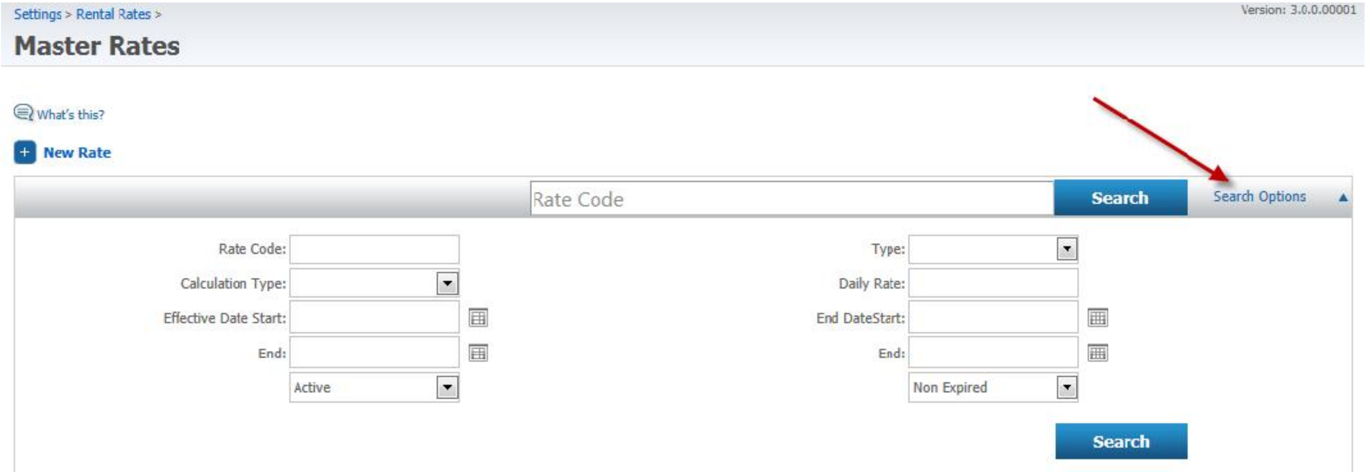
This screen allows you to edit employee's access to logon to the system. You can define permissions for each specific user which gives you greater flexibility to control your employees

Rates

Rental Rates

Master Rates

The rental rates screen allows you to enter and manage your rental rates in Rent Centric. When you click on Rental Rates you will be able to search for existing rates by entering the rate code and clicking on search or simply click on Add New.   By clicking on Search Options you may search for rental rates by a number of search criteria



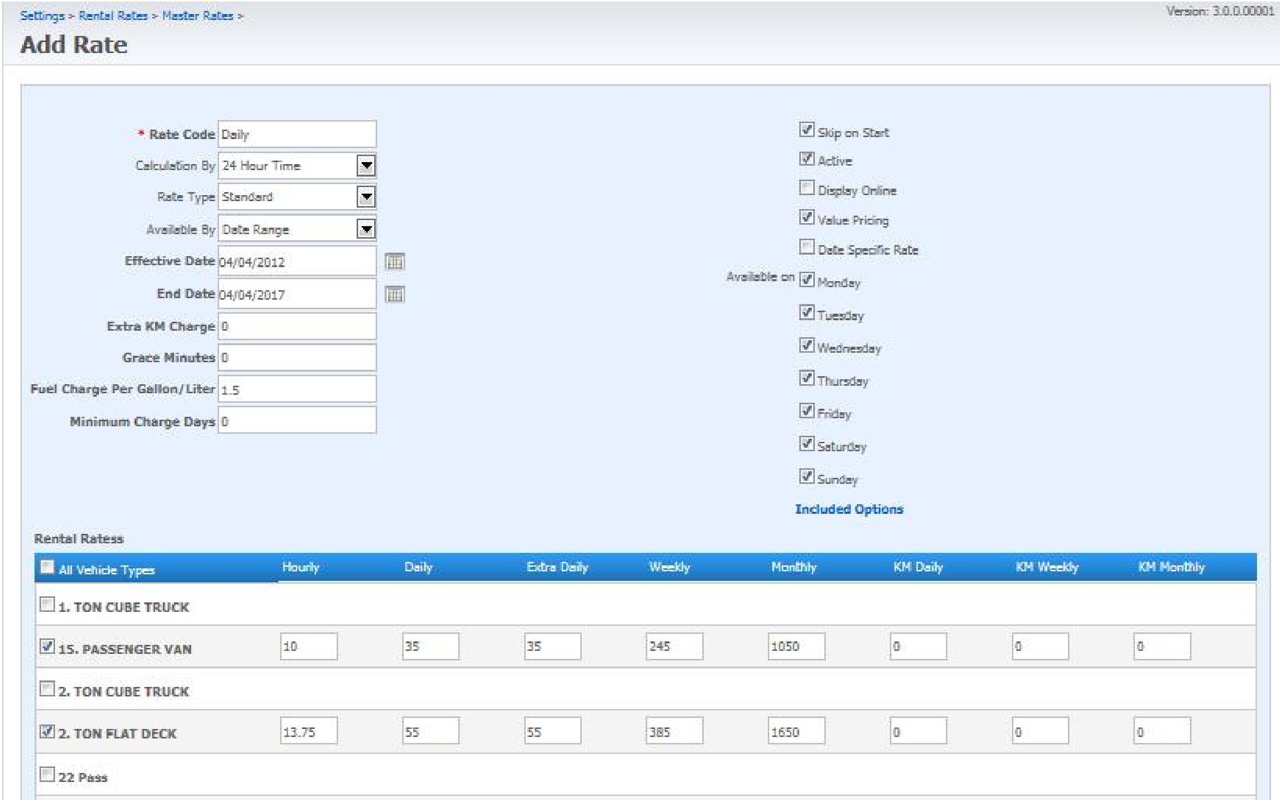
- **How Add / Edit New Rates**
  - Click on **Rental Rates > Master Rates**
  - Click **Add New** or **On a Rate** to Edit
  - Click on **Save**
- **Rate Code:** Rate code identifies the cost of renting out your vehicles by specific time allotments (e.g. daily, hourly, weekend, etc.) This Rate Code will display in your rate selection drop down menu when checking in or checking out vehicles.
- **Calculation By:** This specifies the Calculation method used by this rate. 24 Hour calculation is the standard calculation method for most car rentals. Every 24 Hours is calculated as a rental day. However some rentals use Calendar type calculation where every date change is calculated as a full day. For example if some one rents the car from 4 PM today to 11AM tomorrow, the Calendar day will calculate the rate for two days, even though the vehicle was only rented for 19 hours, which is less than a day.
- **Rate Type**
  - **Standard:** The most common used rate type which simply starts from daily and goes to weekly and monthly as days are added.
  - **1 to 30 Day Multiday:** Multi day rate type is used from 1 to 30 days if you have a specific number of rental days. For example if you have a 7 day rate which is different from other rates, at online reservation website when your customers request a 7 day rental, this rate takes priority.

- **Weekend:** This rate type allows you to provide a weekend specific rate with pickup date/time and drop off date/time range. For example you can setup $24 weekend rate and enter Pickup Date Friday, Pickup Time 9 AM and Drop off day of Monday, Drop off time 4 PM. In this example, if clients request a rental anytime after 9 AM on Friday and before 4 PM on Monday which is between pick up and drop off date/time, this rate will be available to them.
- **Min/Max Days:** This is same as above multiday rate and it allows you to select a range of multiday to apply a single rate to. For example if you have a rate for 7 to 14 days you can simply select this rate type and enter min days and max days in the input boxes on the right of the screen.
- **Hourly/Daily/Weekly/Monthly Rate Types**: Select these rate types if you would like to charge only based on this unit. For example if you like to charge a daily rate from first day and not switch to weekly or monthly, select Daily.
- **1 to 30 Day Flat:** This rate type is for flat rate rentals which allow you to enter a flat daily rate and amount will be for the entire rental. For example if you select 2 day Flat and enter $130 in daily, the system will charge a flat rate of $130 regardless of days and hours. This rate is the least popular rate type and we recommend using Multiday rates instead to enter the daily rate amounts in daily field.
  - **Hourly Block:** This rate type is used in Bicycle rentals or other hourly rental industries. Once you select this rate type a link will appear beside rate type. By clicking on this link you can setup up to 10 hourly rates for the rental. For example if the first hour is $45 you can enter $40 for second hour and $35 for third hour and continue entering the hourly rates.
    Minimum: Select minimum minutes for this rate. For example if the minimum charge is 15 minutes you can select 15 and the rental will charge 15 minutes minimum even if the rental is 10 minutes.
  - **Minute Block:** Select the block of minutes in an hour. The hourly rate will be pro-rated to the blocks selected. For example if you select 15 minute blocks, on a $40 hourly rate, the rate will be divided by 4 which will be 4 - 15 minute blocks in an hour which is $10. Then at the beginning of every block $10 will be charged.

- **Available by:** Select Date Range which will provide Effective and End date selection or Season which will provide a drop down menu to select a previously entered season. See Settings > Rental Rates > Seasons
- **Extra Mileage/KM Charge:** This charge will apply if the total driven KM / Mileage exceed the total allowed on the rental. Use zero if you would like to allow for unlimited KM / Mileage. Use 1 if you would like to charge per each driven KM / Mileage
- **Grace Minutes:** Enter minutes which you will allow the customer to be late when returning the vehicle. System will give 59 minutes by default. Any number entered in this field will be added to 59 minutes. You are able to enter a negative number for example -59 which means 0 grace minutes
- **Fuel Charge:** Fuel charge applies to if fuel in is less then fuel out. The charge is calculated based on the rented vehicle tank size which is specified under vehicle specifications.
- **Minimum Rental Days:** Set minimum days for a rental period
- **Skip on Start:** Check to skip the hourly rate on start

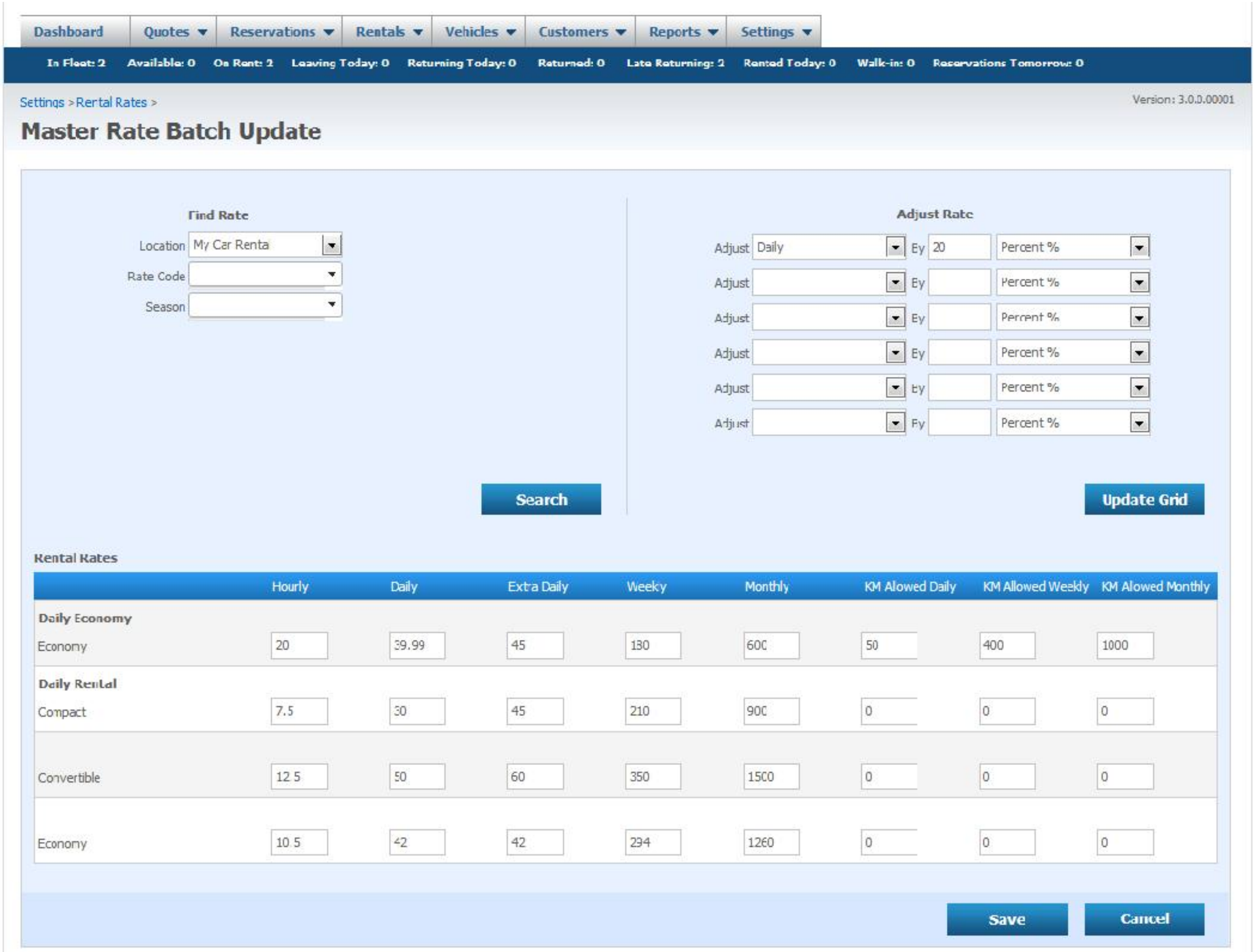
- ☑ **Active:** Check this option to activate the rate. If the rate in not activated, it will not display anywhere in the application
- ☑ **Display Online:** Select this option if you like to make this rate available online
- ☑ **Value Pricing:** When selected, the application will automatically check to see if the higher line rate is cheaper than the final calculated rate. For example if someone rents the car for 6 days and the total is greater than the weekly rate, the software will automatically use the weekly rate
- **Date Specific Rate:** When selected you are able to charge your clients a specific daily rate based on the rate values you enter under Rate Value Updates. For example under Rate Values Update you setup a higher daily rate for Christmas holidays which could be $39 per day and your regular daily rate is $25. Lets say you rate is $39 on Dec 22 and 23rd. When a client rents the vehicle from Dec 21 to 25th then they will get charged in this manner. Dec 21=$25, Dec 22=$39, Dec 23=$39, Dec 24=$25, Dec 25=$25. As you can see the rate goes higher for those date specific daily rates and comes down at the end.
- **Available On:** Select the days of the week this rate will be available online
- **Included Options:** Check the options/taxes included system will subtract from total Time and Mileage and add back in if selected as an option. For example if tax is included in your rental rate the tax amount will subtract out then add back in so you may report taxes collected
- **Vehicle Type:** Vehicle type refers to the size of the vehicle (e.g. compact, economy, full size, luxury, etc.) Throughout the application, when the vehicle type is selected, it will automatically identify with the rate code entered with it on this screen. You can select ALL to apply this rate to all vehicle types or select one or more vehicle types from the list
- **Daily, Weekly and Monthly Rates:** Enter your rate values for example 20, 140 and 600. When daily rate is entered system will auto-populate weekly and monthly by multiplying the daily rate by 7 and 30 (or the number of days set in the month under Location Information)
- **Mileage/KM Allowed:** Enter maximum mileage allowed per daily, week and month. At time of rental, if rental mileage/KM exceed maximum allowed, you can charge client for additional mileage/km charge. To enter additional mileage charge click on Advance tab. Enter 0 in all three boxes to allow unlimited mileage and enter number 1 to charge for every Mileage/KM driven.

You may set up one Rate Code for many vehicle types with various daily rates.



Master Rate Batch Update

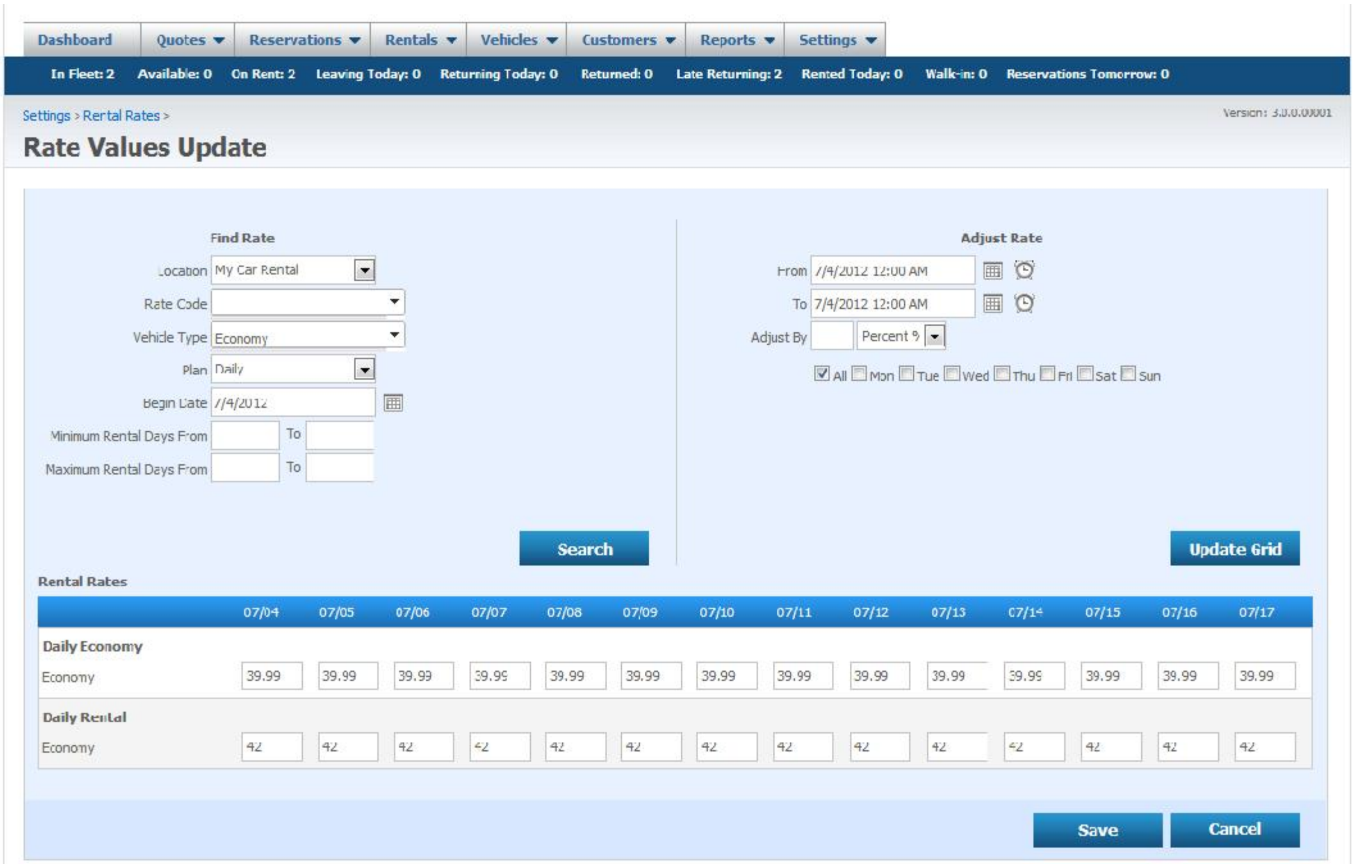
Master Rate Batch Update allows you to update multiple master rates in one action and change them to your desired value. Simply find the rate by selecting the location, rate code and season and click on Search to see the matching rates for your search criteria. Once you find the rate simply enter the new adjustment values on the right side of he screen based on percentage +/- change or flat increase/decrease or simply a total rate value and click update grid to batch update all the rates you see in below table.


Dashboard
Quotes
Reservations
Rentals
Vehicles
Customers
Reports
Settings
In Fleet: 2 Available: 0 On Rent: 2 Leaving Today: 0 Returning Today: 0 Returned: 0 Late Returning: 2 Rented Today: 0 Walk-in: 0 Reservations Tomorrow: 0
Settings > Rental Rates >
Version: 3.0.0.00001
Master Rate Batch Update
Find Rate
Location My Car Renta
Rate Code
Season
Adjust Rate
Adjust Daily By 20 Percent %
Adjust By Percent %
Adjust By Percent %
Adjust By Percent %
Adjust By Percent %
Adjust By Percent %
Search
Update Grid
Rental Rates
Hourly Daily Extra Daily Weeky Monthly KM Alowed Daily KM Allowed Weekly KM Alowed Monthly
Daily Economy
Economy 20 39.99 45 130 600 50 400 1000
Daily Rental
Compact 7.5 30 45 210 900 0 0 0
Convertible 12.5 50 60 350 1500 0 0 0
Economy 10.5 42 42 294 1260 0 0 0
Save
Cancel

Rate Value Update

Rate value Update allows you to override the master rate value. For example if you have setup a rate for $20 a day for a season you can simply update 10 days out of that season to a higher rate like $30 e.g. Christmas holidays. This value takes priority over the original master rate value and is displayed if someone is requesting a rate for that date range. This means if the client picks up the vehicle in those 10 days at a higher rate their entire rental will remain on this rate unless you have enabled the Date Specific Rate option (refer to Master Rates). which in this case the rate will be higher in those specific days and go down to original rate afterwards. You client will clearly see the break down on their invoice.

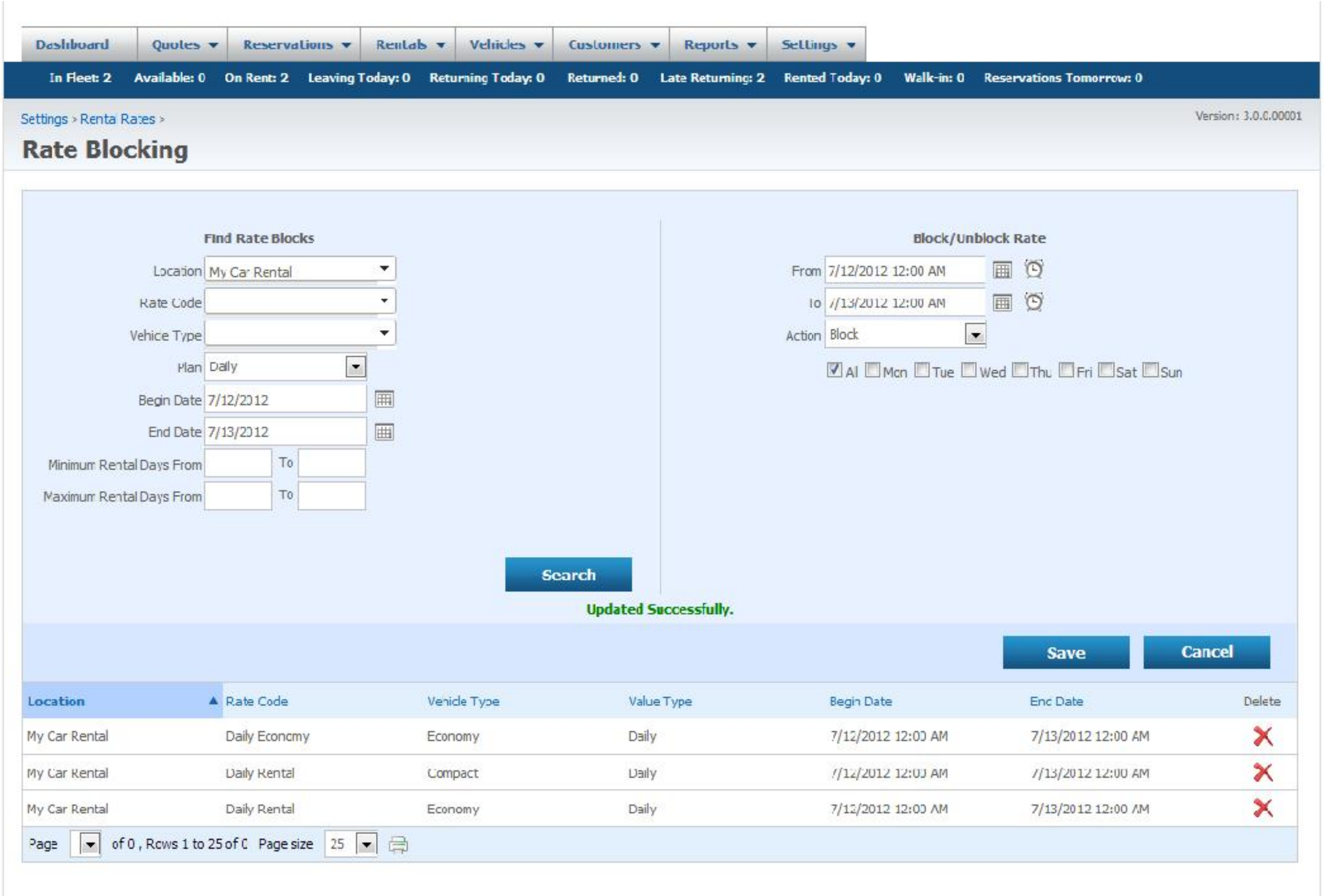
To update rate values simply start by finding the rates you like to override the values for. Select the location, rate code, vehicle type, plan(daily weekly etc), starting date which you like to update from or by minimum maximum rental days. Once you click search you will find the rates below in the table. Now on the right you enter the date range you are adjusting the rate and the amount of adjustment by percentage +/- or flat increase/decrease or simply a total rate value and click Save. You can also select a specific day of the week which this new value will be available on.



Rate Blocking

Rate blocking allows you to block a specific rate for a specific date range. You would use this if you do not want to provide any bookings for a specific date range.
Simply start by selecting the locations, rates, vehicle types, plan and the date range you are planning the block the rates as well as by minimum and maximum rental days and click search. At the table below the system display any existing rate blocks you have entered previously. You

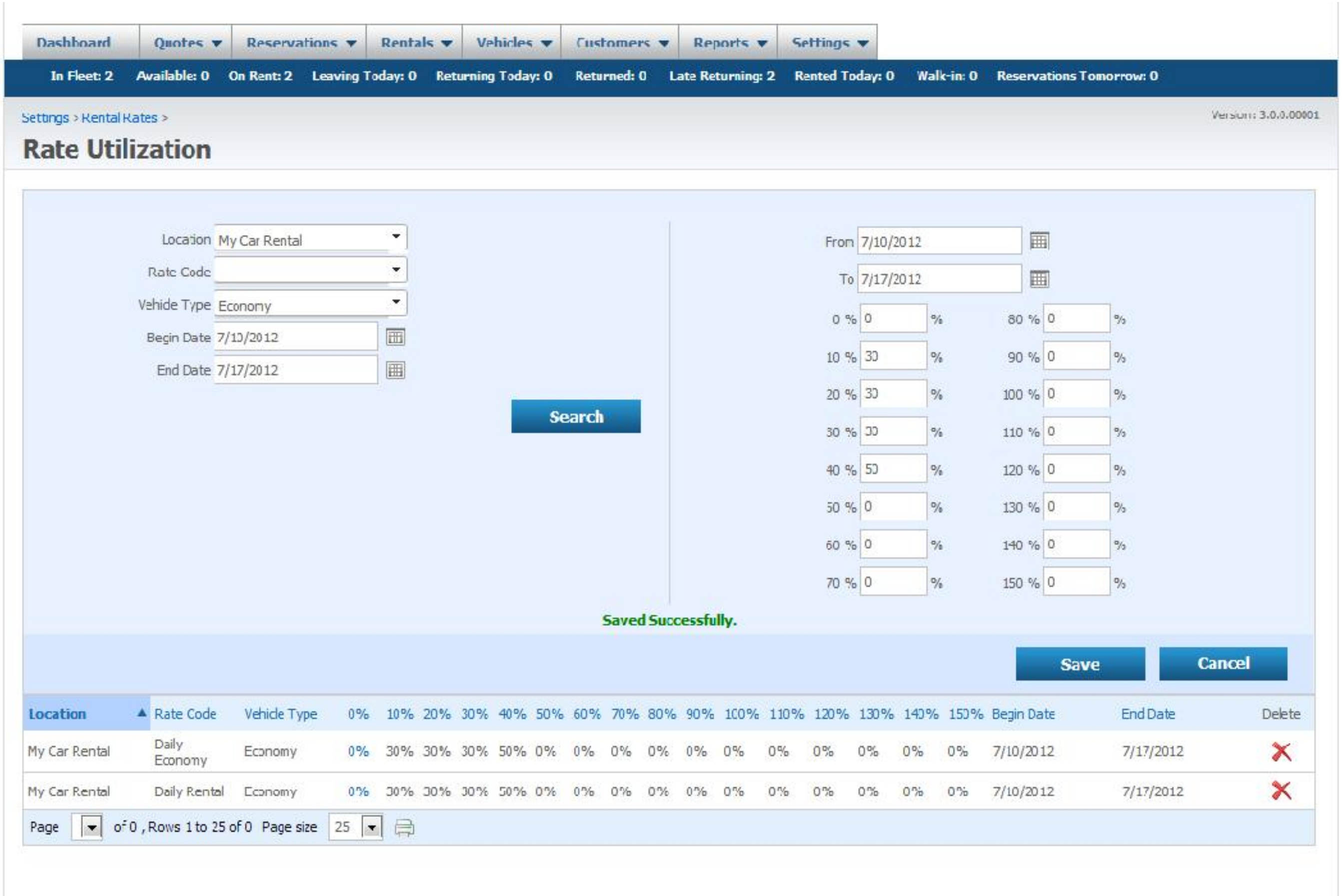
are able to manually delete them or simply by entering the date range eaither block or unblock the rates and also specifiy the day of the week.. Once done click Save and blocked rates will apear in the table below.



Rate Utilization

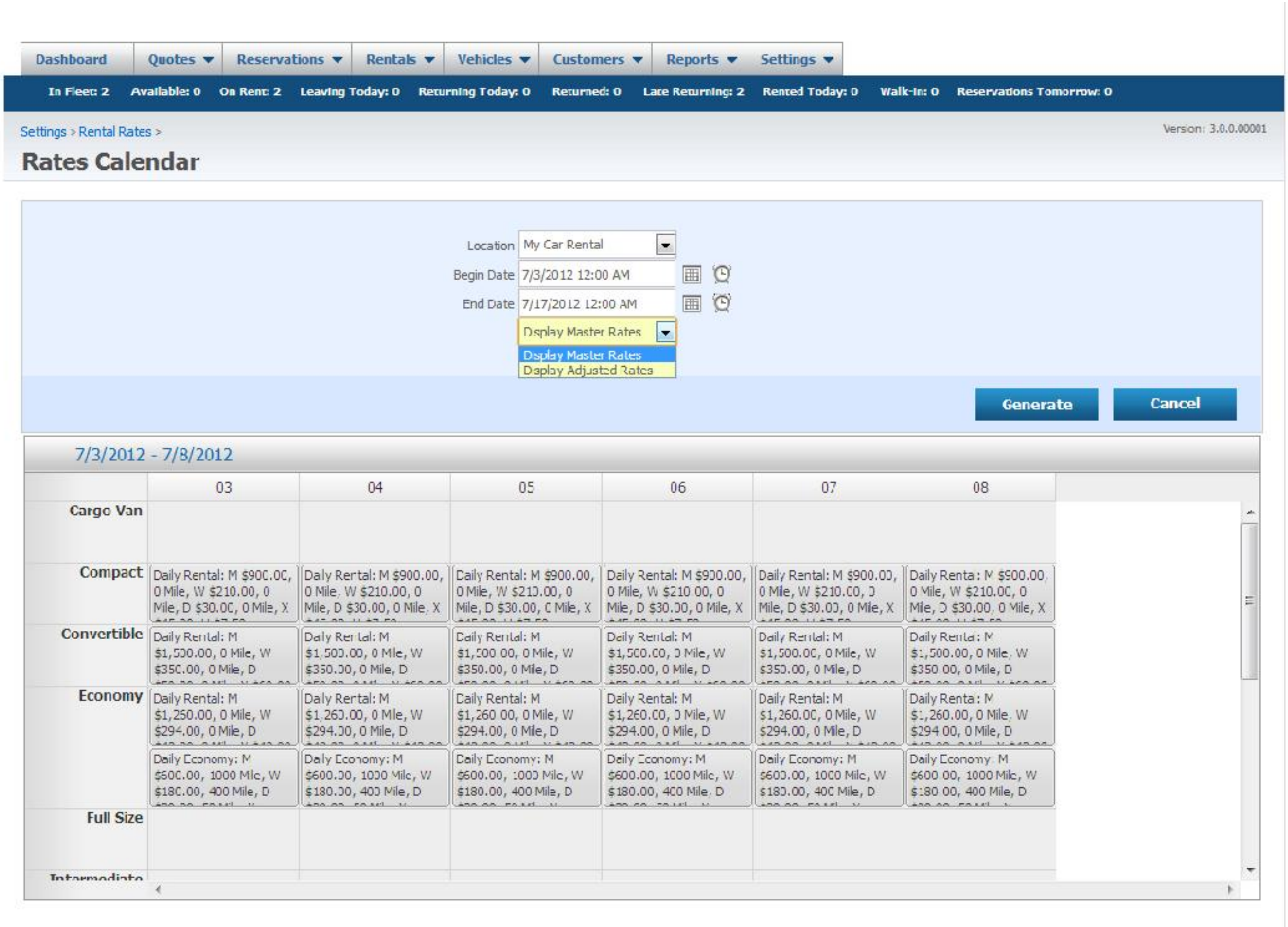
Rate utilization allows you to effectively increase or decrease your rate based on number of available vehicles you have in a specific vehicle type. For example if you have 10 vehicles and 7 of them are booked which is essentially 70%. If you enter 30 in the 70% field, your rate will automatically increase by $15 when you hit the 70% utilization. This means if for example you rate was originally at $30 it will go up $45 when you hit 70% utilization. You can also decrease your rate by entering a negative amount for the specific date range which for example can he in holiday season.

You can start by finding existing utilization entries with selecting locations, rate codes, vehicle types and date range. Then on the right side you can enter the and the percentage +/- for the rate and click save to add the utilization.



Rates Calendar

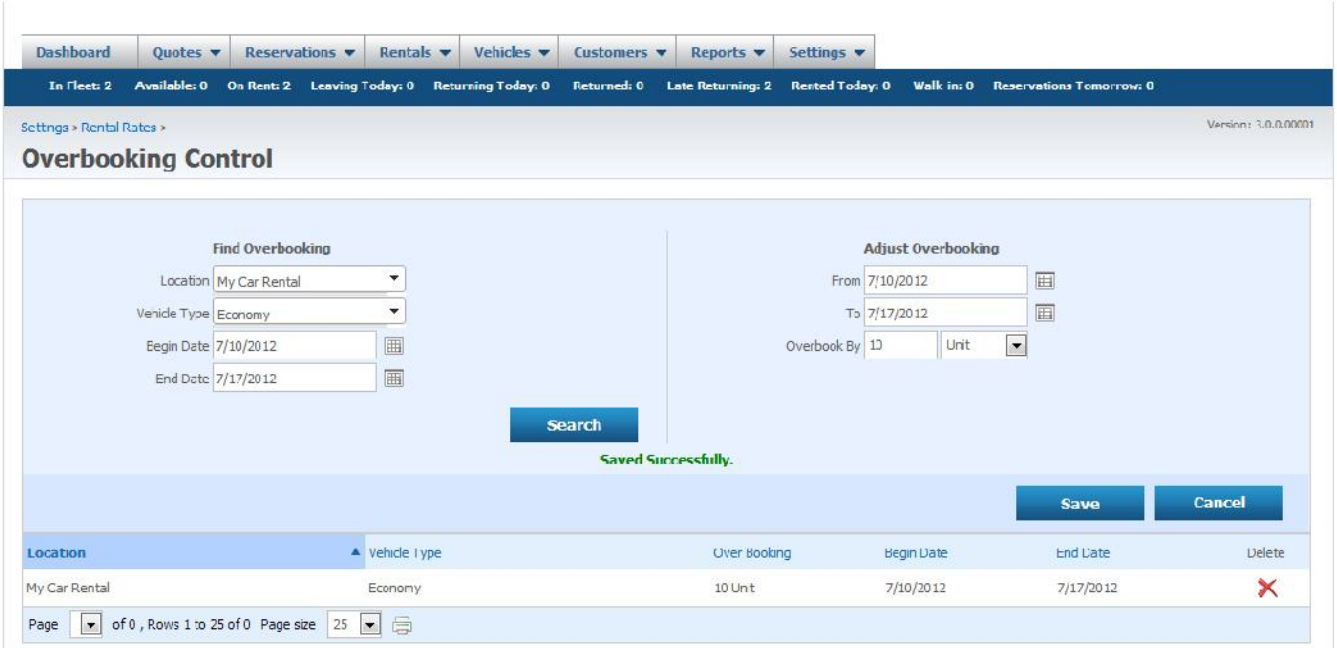
with Rates calendar you can see, in one view all the rate values in the future. This is very helpful when you are planning your rate structure for the future. Simply select the location and date range and then choose to display original master rates or overriden rates based on rate rules and click generate.



Overbooking Control

Overbooking control allows you to provide more booking than your fleet for a specific vehicle type. For example if you have 10 minivans you are able to allow 13 bookings for a date range which could be good if you have 3 clients not showing up.

To find overbooking you can simply select locations, vehicle types and enter the date range to find if there are any overbookings.
To add over booking enter the date range and enter overbooking by unit or percentage and click save. You can always edit or delete these records.



Set up

In the setup page you can simply select the number of days in the month which will tell the system when to kick in the monthly rate and also setup the ratios (multiplication) when entering a daily rate and having the rest of the fields being multiplied by.

Seasons

Rates can be valid for as date range or a seaon which is repeated every year. You are able to setup Seasons for example high seasons and low seasons by date and month of the year which can be used in the rate setup in order to offer a specific rate every year in the same months without having to enter the same rate for a new date range

Insurances Coverage

Use this utility to enter specific insurance coverages. Insurance coverages are used for customers who would like to purchase additional protection for their vehicle rental.

- o To Add New Insurance
  - Click on 

  - Enter the **insurance information** (see "Insurance Fields" below for more details)
  - Click on **Advanced** tab to access more setup information.
  - Click **Save**

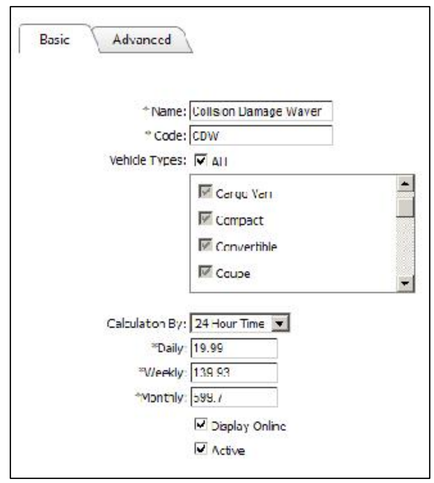
- **To Edit Insurance**
  - Click on **Insurances Coverage**
  - Modify the **insurance information** (see "Insurance Fields" below for more details)

- Click on **Save**

Basic Tab

Basic tab allows you to quickly add or edit insurance. If you like to have more setup simply click on Advance tab.

- **Insurance Name:** In this field, you can identify the full name of the Insurance Code. This "friendly" version of the code will appear when printing out rentals or checking out vehicles (e.g. PDW = Personal Damage Waver)
- **Insurance Code:** Insurance code is used to identify the insurance name on the rental (e.g. PDW) Please use short codes or acronyms if possible. Please do not use space in the code title.
- **Calculation By:** This allows you to select different calculation methods. You can choose between standard 24 hour and calendar day
- **Vehicle Type:** Vehicle type refers to the size of the vehicle (e.g. compact, economy, full size, luxury, etc.) Throughout the application, when the vehicle type is selected, it will automatically identify with the insurance entered with it on this screen. You can select ALL to apply this rate to all vehicle types or select one or more vehicle types from the list



- **Daily, Weekly and Monthly Rates:** Enter your rate values for example 20, 140 and 600. When daily rate is entered system will auto-populate weekly and monthly by multiplying the daily rate by 7 and 30 (or the number of days set in the month under Location Information). The hourly will be populated automatically in the advance tab by dividing the daily rate by 4 which you can change
- **Display Online:** Select this option to make this insurance available online
- **Active:** Check this option to activate the insurance. If the insurance in not activated, it will not display anywhere in the application

Advance Tab

- **Daily, Weekly and Monthly Rates:** Enter your rate values for example 20, 140 and 600. When daily rate is entered system will auto-populate weekly and monthly by multiplying the daily rate by 7 and 30 (or the number of days set in the month under Location Information). The hourly will be populated automatically in the advance tab by dividing the daily rate by 4 which you can change
- **Deductible:** This field is mostly for display on the rental to show the insurance coverage deductible amount
- **Grace Minutes:** Enter minutes which you will allow the customer to be late when returning the vehicle.
- **Effective Date and End Date:** Enter the start and end date range for insurance to be available

- **Image:** Browse to upload an image for this insurance. For example for CDW you can use a safe driver wearing seatbelt. This image will show on your website when you clients click on Optional Extras areas to view more details about your insurances.
- **Memo:** Add a note regarding insurance coverage
- ☑ **Value Pricing:** When selected, the application will automatically check to see if the higher line rate is cheaper than the final calculated rate. For example if someone rents the car for 6 days and the total is greater than the weekly rate, the software will automatically use the weekly rate.
- ☑ **Mandatory Insurance:** This insurance will be mandatory when this vehicle type is selected.

Taxes

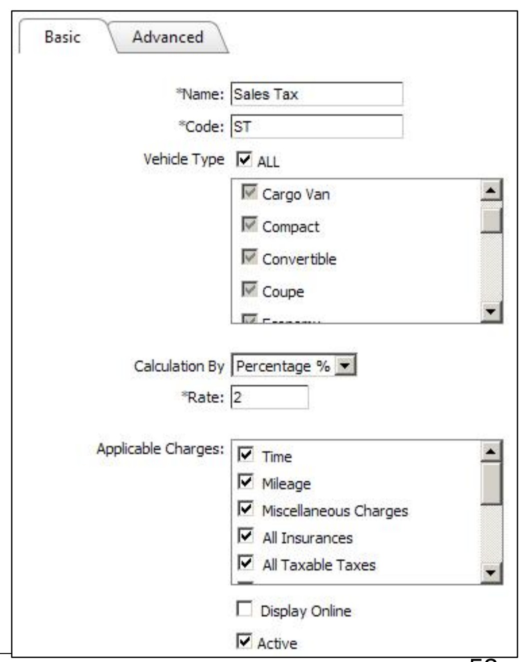
Tax code is designed to let you define the tax configuration for each location. The taxes are used in the total amount when starting a rental

- To Add a New Tax
  - Click on 

  - Enter the **Tax information** (see "Tax Information Fields" below for more details)
  - Click on **Advanced** tab to access more setup information.
  - Click on **Save**

- **To Edit Tax**
  - Click on **Taxes**
  - Click the Tax Rate you would like to edit
  - Modify the **Tax information** (see "Tax Information Fields" below for more details)
  - Click on **Save**

- **Basic Tab**



  - **Name:** Provides the description or full name of the tax when printing out rentals or checking out vehicles. (e.g. Goods & Services Tax)
  - **Code:** Tax code is used to identify the Tax name on the rental. Please use a short name or acronym (e.g. GST)
  - **Calculation By:** Most of the taxes are calculated by percentage type but you are also able to have other types of calculation such as 24 Hour, Calendar Day and Flat. For example you could use the 24 Hour calculation for Vehicle Licensing Tax
  - **Rate:** Enter the tax rate. For example for 5% tax enter "5" in the rate field and not "0.05"

- **Vehicle Type**: Vehicle type refers to the size of the vehicle (e.g. compact, economy, full size, luxury, etc.) Throughout the application, when the vehicle type is selected, it will automatically identify with the tax entered with it on this screen. You can select ALL to apply this rate to all vehicle types or select one or more vehicle types from the list
- **Applicable Charges:** Click on ALL or select specific items that are taxable other Taxes, Insurances and Misc. Charges:
- **Effective Date and End Date:** Enter the start and end date range for insurance to be available.
- ☑ **Display Online:** Select this option to have this tax available online
- ☑ **Active:** Check this option to activate the rate. If the rate in not activated, it will not display anywhere in the application

- **Advance Tab**
    - **Applicable Taxes, Insurances and MiscCharges:** Click on ALL or select specific items that are taxable.
    - ☑ **Taxable:** This option allows you to have tax on tax and it's only applicable to any calculation type except Percentage.
    - ☑ **Value Pricing:** When selected, the application will automatically check to see if the higher line rate is cheaper than the final calculated rate. For example if someone rents the car for 6 days and the total is greater than the weekly rate, the software will automatically use the weekly rate.
    - ☑ **Mandatory Tax:** Select this option to make this tax mandatory

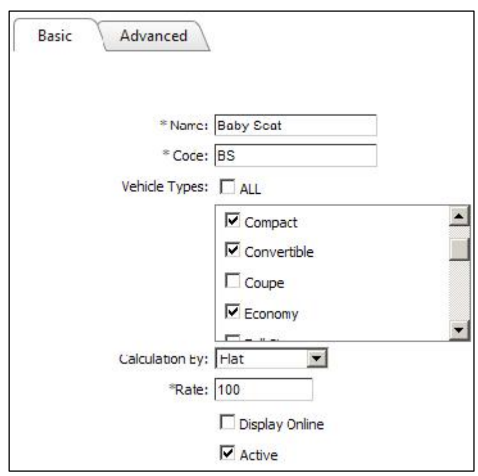
Misc. (Miscellaneous) Charges

Misc. Charge is designed to let you specify all your miscellaneous charges such as additional driver or baby seats.

- **To Add New MiscCharge**
    - Click on 

    - Enter the **MiscCharge information** (see "MiscCharge Fields" below for more details)
    - Click on **Save**

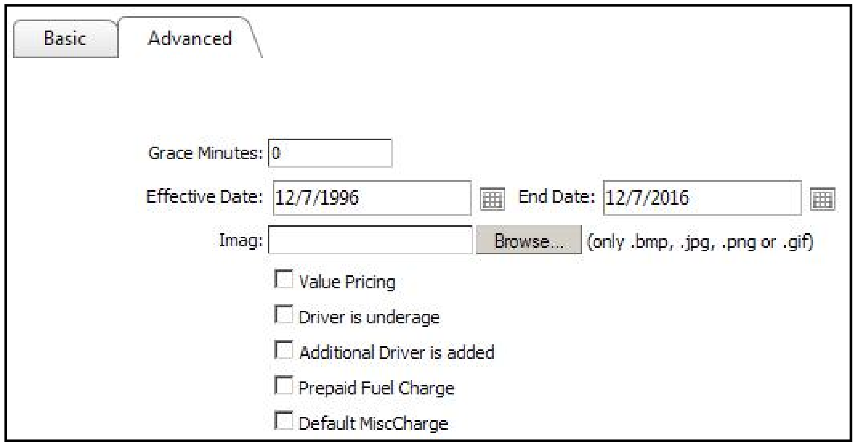
- **Basic Tab**
- **MiscCharge Name:** Describes the description or full name of the miscellanies charge when printing out rentals or checking out vehicles.(Additional Driver)
- **MiscCharge Code:** Used to identify the miscellaneous charge name on the rental. Please use a short name or acronym. (e.g. AD) for additional driver



- **Calculation By:** Most of the miscellaneous charges are calculated by standard 24 Hour calculation you are also able to select percentage calculation for specific charges such as Airport tax
- **Vehicle Type:** Vehicle type refers to the size of the vehicle (e.g. compact, economy, full size, luxury, etc.) Throughout the application, when the vehicle type is selected, it will automatically identify with the Misc. Charge entered with it on this screen. You can select ALL to apply this rate to all vehicle types or select one or more vehicle types from the list
- **Rate:** Enter the rate. For example for 5% tax enter "5" in the rate field and not "0.05"
- **Vehicle Type**: Vehicle type refers to the size of the vehicle (e.g. compact, economy, full size, luxury, etc.) Throughout the application, when the vehicle type is selected, it will automatically identify with the tax entered with it on this screen. You can select ALL to apply this rate to all vehicle types or select one or more vehicle types from the list

- **Display Online:** Select this option to have this tax available online
- **Active:** Check this option to activate the miscellaneous charge rate. If the rate in not activated, it will not display anywhere in the application.

- **Advance Tab**



- **Grace Minutes:** Enter minutes which you will allow the customer to be late when returning the vehicle. **Effective Date and End Date:** Enter the start and end date range for insurance to be available
- **Miles Included:** Enter miles/km included or 0
- **Effective Date and End Date:** Enter the start and end date range for insurance to be available.
- **Group:** Select from drop down menu or add a group
- **Image:** Browse to Upload an image for this insurance. For example for CDW you can use a safe driver wearing seatbelt. This image will show on your website when you clients click on Optional Extras areas to view more details about your insurances.
- **Value Pricing:** When selected, the application will automatically check to see if the higher line rate is cheaper than the final calculated rate. For example if someone rents the car for 6 days and the total is greater than the weekly rate, the software will automatically use the weekly rate.
- **Driver is Underage:** This charge will apply if the driver is underage. You can set the underage value at Location Information page.
- **Additional Driver:** This charge will apply if additional driver is added to the reservation or rental.
- **Prepaid Fuel Charge:** Click if you wish prepaid fuel to automatically charge on rentals.
- **Default MiscCharge:** Click if you wish this MiscCharge to automatically charge on rentals.

Rental / Discount Reasons

Rental / Discount reasons are used to keep track of any specific reasons a car may have been rented or discounted to a customer. This screen allows you to add/remove rental/discount reasons which are used in customer rentals.

- **To Add Rental/Discount reason**

1. Click on New Reason

2. Enter the **Rental/Discount reason** (e.g. Business, Pleasure, Holidays, etc.)
3. From the Type drop down menu select either **“Rental”** or **“Discount”** to identify the reason
4. Type any **additional information** you like in the memo window (optional)
5. Click **Save**

- **To Delete a Rental/Discount reason**

1. Click on 
2. You will be prompted with a deletion conformation message. Click **Yes** to delete the Rental/Discount reason

One Way Rates

In order to setup one way rates between your regions, use this table to populate the information by selecting Region From, Region To and One Way Fee to populate the one way rate. Once entered, at Quote, Reservation and Rental screens the one way fee will apply as an additional charge.

One Way Regions

In order to setup one way rates you will need to set up regions and assign to the specific locations.

Company

Information

Add companies who would be paying for a rental an insurance company for example

- **Company Name:** Full company name
- **Code:** Initials of Company Name, SFI for State Farm Insurance for example or any code you desire
- **Address 1:** Street address of company
- **City:** City of company
- **Zip/Postal:** Zip/postal code of company
- **Phone:** Business telephone # of company
- **Email:** Business email address of company
- **Claims Office:** Claims office or adjustors name if insurance company
- **Minimum Age:** Minimum age allowed to rent
- **Policy Number:** Policy # of Insurance company
- **Policy Expiry:** Expiry date of insurance policy
- **Fax:** Fax # of company
- **Insurance Rep:** Representative or adjustor of Insurance Company
- **IATA Number:** International Air Transport Association 3 letter code

- **Copy Insurance:** Check to send a copy of Companies/Corporates information to the insurance company listed
- **Active:** Check if active company
- **Company Type:** Please Select Insurance Corporate Dealership Body shop Bank/Finance Travel Agency Hotel Repair Service Affiliate Law Firm Travel Wholesaler Franchise Leasing Other or CHARITY
- **Contact Name:** Name of Company contact
- **Address 2:** Address of Company
- **State/Province:** State/Province where company is located
- **Tax Name:**
- **Tax Address:**
- **Tax ID:** Tax id number
- **CURP:**
- **Folio**
- **Country:** Country where company is located
- **SSN/SIN:** Social Security Number / Social Insurance Number, not mandatory
- **Mileage Cap** Total mileage allowed
- **Partner Point ID:**
- **Parent IATA Number:**

Set up

You may set up commission or payment information on this page

- **GL Number:** General Ledger account number
- **Commission Type:** Select either $ or %
- **Commission Amount:** Enter amount
- **Sales Person:** Sales person or contact
- **Remit to:** Enter remittance information
- **Tax Exempt:** If company is tax exempt enter #
- **Credit Card Number:** Enter credit card #
- **Invoice Type:** Enter type of invoice; monthly for example
- **High Credit:** Enter amount of credit limit
- **Class Code:**
- **Account Code:**
- **Control Number:**
- **Memo:** Add memo or note
- **Direct Bill:** Check if company for bill split
- **Credit Card Type:** Select from drop down menu

- **Discount %:** Select amount from drop down menu
- **Hourly:** Select either Company or Renter
- **Daily:** Select either Company or Renter
- **Extra Daily:** Select either Company or Renter
- **Weekly:** Select either Company or Renter
- **Monthly:** Select either Company or Renter
- **Damage:** Select either Company or Renter
- **One Way:** Select either Company or Renter
- **Mileage:** Select either Company or Renter
- **Upgrade:** Select either Company or Renter
- **All Insurances:** Select either Company or Renter
- **All Misc .Charges:** Select either Company or Renter
- **All Taxes:** Select either Company or Renter

Companies/Corporates

Lists all companies/corporates added to the system. You may click on the blue company name to edit or search by company name from the search field.

Company Type

Many company types are included you may click on New Company Type to add a new type. Types would be used when adding a company. For example a bank would be a type of bank/finance

Import Data and Other Tools

Customer Import

You may click to find the upload document, instructions and then browse to upload your import document.

Company Import

You may click to find the upload document, instructions and then browse to upload your import document.

Rate Import

You may click to find the upload document, instructions and then browse to upload your import document.

Reservation Import

You may click to find the upload document, instructions and then browse to upload your import document.

Referral Import

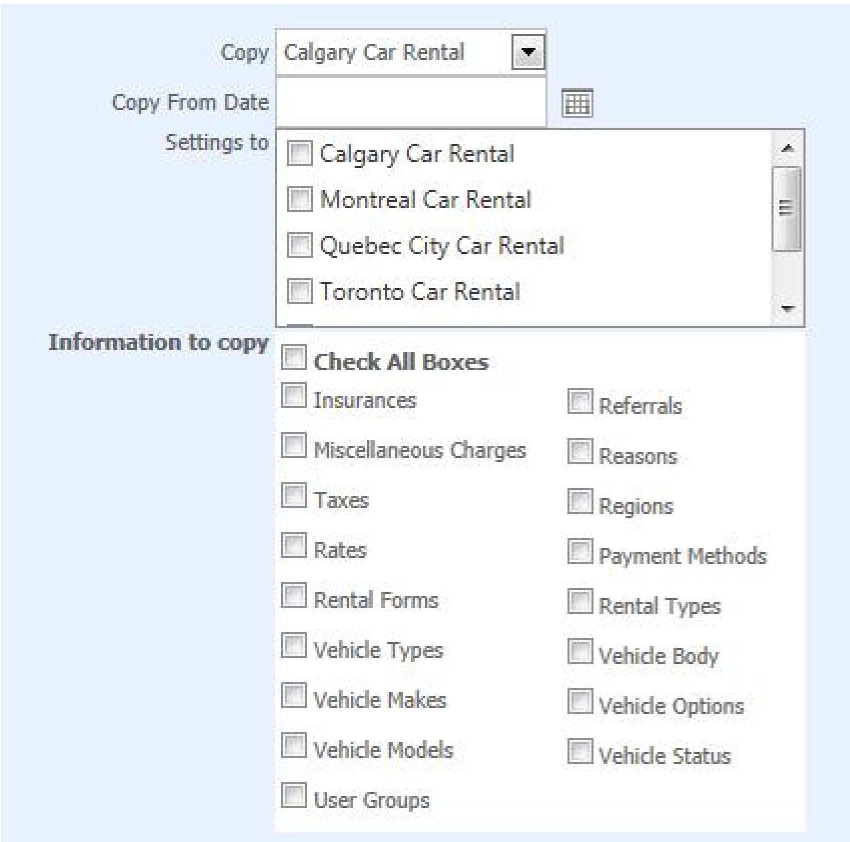
You may click to find the upload document, instructions and then browse to upload your import document.

Vehicle Import

You may click to find the upload document, instructions and then browse to upload your import document.

Copy Location Set up

You may select to copy information from one location to another.



Re-Open Rentals

You may check the box to the left of the RA# you wish to open and click submit. The RA will appear in the On Rent list

Payment Settings

Payment Methods

You may Add/Remove payment methods you accept in this screen

Internet Payment Gateway

Rent Centric offers secure internet credit card processing systems. This allows Car Rental locations to process customer's credit cards online through their desired payment gateway which offers a more robust, high speed and accurate credit card processing since credit cards are processed in less than a second.

By simply entering the customer's credit card information into the system you're able to process their credit card without having to utilize a POS terminal. This way, the customer information and their transactions all reside in Rent Centric, which makes tracking much easier.

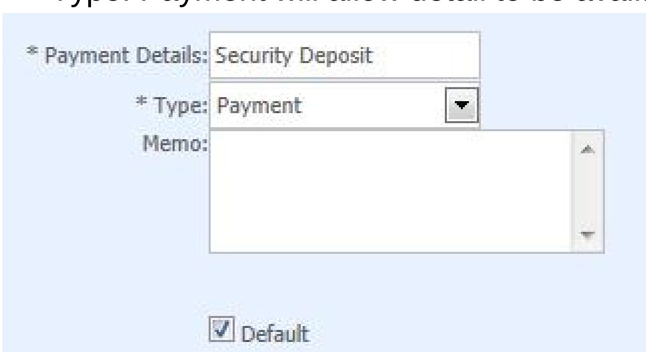
To enable processing through Rent Centric, contact your bank or desired processing company, once you are signed up, they will provide you with a merchant number or password depending on the processor requirements. Go to internet payment gateway screen, choose the processor and enter your merchant information. Once entered, you will be able to start processing credit cards in real-time.

> **Note**:
> **Central Coast Processing** requires batching everyday when you are done for the day which you can do by clicking on Batch Process and submitting the transactions for settlement at the bank.

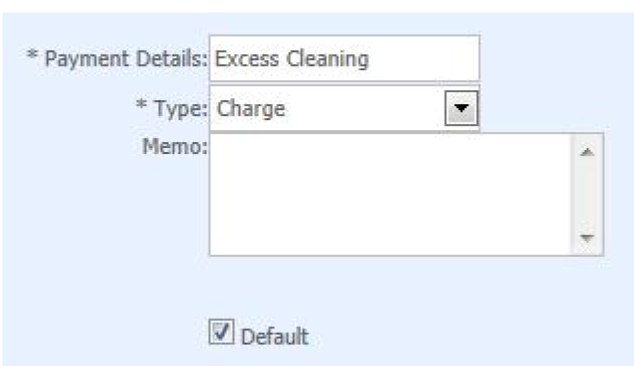
Payment Details

Add/Remove payment details when adding Other Charges in checkout or reservation.

- Type: Payment will allow detail to be available in Payments & Charges



- Type: Charge will allow detail to be available in Other Charges I – IV.



Batch Process

Used with Central Coast Processing Internet Payment gateway only. You may submit your batch after each transaction or day to send transaction(s) to Central Coast Processing for settlement.

Local Currency

You may add a currency exchange rate for selection in Location Information

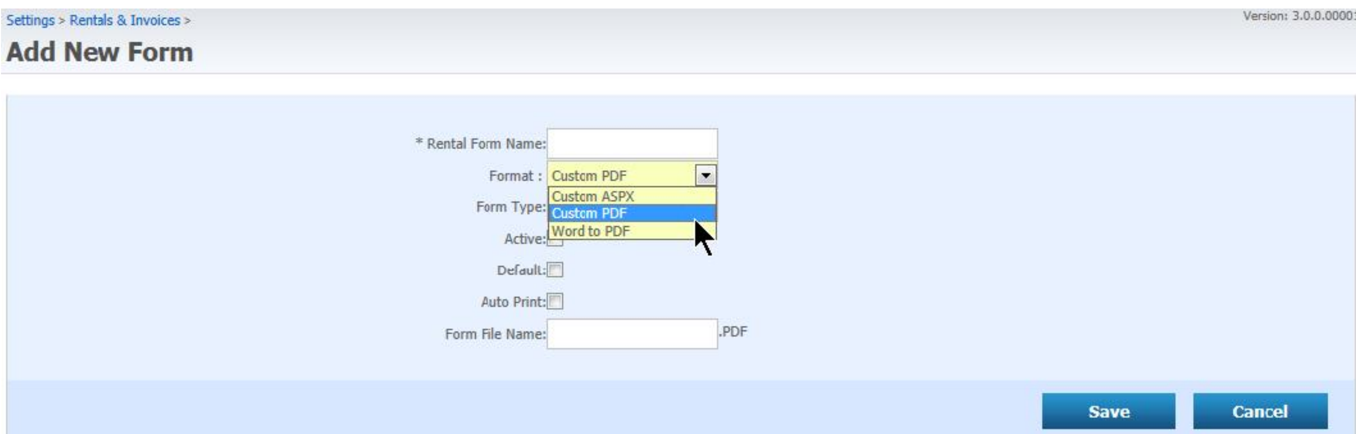
Rental Contracts & Invoices

Rent Centric provides many choices for your rental contract and invoice print outs.

- Default contract: You can simply use one of the existing contracts in the system. Standard is used for rentals. Invoice is used to generate an invoice for customers tax proposes. Bill Split Invoice is used when you split the rental bill with one or more parties.

Add New

You may add your PDF or convert a word document to a PDF to upload a background image.



Rentals & Invoices

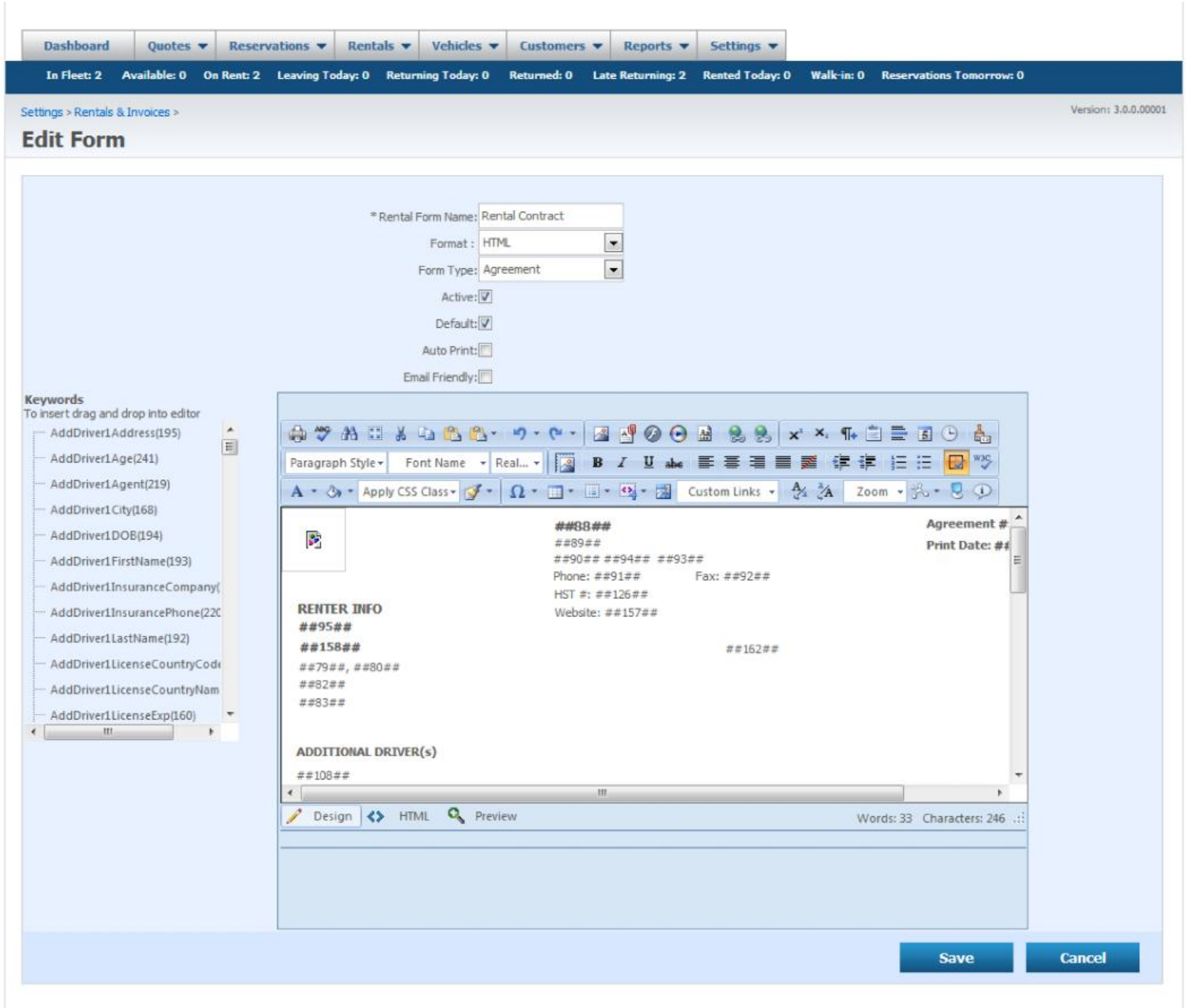
You may edit any HTML contract by clicking on the blue contract name on the left.

Rental forms have following formats:
HTML: this will be in HTML format and you are able to edit the rental contract via the editor and use the keywords on the left side of the screen

ASPX: this is the customized contract developed by Rent Centric team based on your template. To customize rental contracts there is a development fee. Please contact us for more information.

PDF: This format is the most used and recommend. You are able to provide us the PDF rental contract and our developers will embed all the real-time values in the rental contract. The advantage of PDF forms is that they are virtually compatible with every printer regardless of printer brand or operating system such as Mac or PC. To customize rental contracts there is a development fee. Please contact us for more information.

Word to PDF: This format allows you to create a word document rental contract by using the provided keywords (in HTML version) and on once file is uploaded Rent Centric will convert it to PDF on the fly.



Form Type

If rental is selected, it will appear under rental pages such as start rental or end rental and print. If Reservation is selected, it will appear under reservation pages.

Active: Check if contract is active and available for selection
Default: Check if contract is to be default or set first for selection
Auto Print: Check and Print Options box will automatically appear to print contract
Email Friendly: Check and friendly version will be emailed to your customer

Vehicles

Makes

Vehicle make is used when adding a vehicle. This screen allows you to add/remove different vehicle makes. Vehicle makes are used across all locations.

Models

Vehicle model is used in conjunction with vehicle make when adding a new vehicle. This screen allows you to add/remove different vehicle models in conjunction with Vehicle Makes. Vehicle models are used across all locations.

Types

Vehicle Types are used to group different vehicles. For example you can group Economy or Full Size cars by assigning them a vehicle type. This helps when arranging rates or giving quotes to customers.

Code

You may add model codes here for selection when adding the vehicle. For example the XL in Ford Econoline 350 XL

Status

A new status such as "Staff" may be added you may then change the status of the vehicle in Vehicle Specifications. Any status you add and select that ststus as Rentable, the vehicle with this status will be available for reservation and rental.

Body

You may add a new vehicle body such as "Trailer" for example. You can also

Options

You may add options to a body type then select for the specific vehicle

Damage Setup

You may add Damage Locations Right front fender for example and Damage Conditions Scratch for example. These may then be added to the vehicle > Damages > Add New. To add damage inspection sheet please go under Vehicle Body and select the body to upload the inspection image.

Title Locations

You may add as many locations as to where you store the title to your vehicles. Safety deposit box @ Bank of America 123 Main Street for example

SIPP Codes

You may add as many as you wish for selection when adding the vehicle. CCar is a compact car. You may Google SIPP codes for a full list. This feature is used to connect to GDS (global distribution systems)

Repair Order/Maintenance Program

Used to track repairs/maintenance and expenses done to your vehicles

- **Add Repair Order:** Add new repair order or maintenance on a specific vehicle or group of vehicles. You can simply enter mutiple invoices with different amounts under one purchase order and have it sent for approval to head office.
- **Repair / Maintenance Programs:** Add new program name and specific vehicle models
- **Find Repair Order:** Search for previously entered RO #'s
- **Repair Order Email Notification:** Add UserID who is to receive email notification

Setup: Used to establish starting RO and PO #'s and whether to use system wide

Equipment Set up

You may track your equipment's unit and serial #'s per location. For example if you rent out GPS units or baby seats you can enter all the units in this feature. Once entered you can link them to a misc. charge and at time of booking or rental once you select the misc charge, in the pop up window of that charge you can select a specific unit to be given to the customer. This makes your rental units availability in real time and you can run reports to view when your units are coming back under reports section.

Global Settings

Configuration pages that are common between all locations.

- **Master System Setup:** You can manage master system setup for mandatory and optional fields or simply add a survey to appear during the rental end process.
- **Mandatory Fields:** By enabling these options you make the fields in rental process mandatory.
- **Required Fields:** By enabling these options you make the fields in rental process required.
- **Readonly Unit ID at Vehicle Spec:** At editing vehicles you can disable the vehicle ID field to prevent users from changing them
- **Shared information:** By enabling these options you can share information such as rentals, vehicles etc between all locations.
- **Send reservation email check box status:** with this feature you are able to send out reservations emails by default you.
- **Enable group reservations in system:** this feature allows you to add reservations for multiple customers at once
- **Fix Rental location:** this option makes the rental and reservation location a fixed field.
- **Disable expected return date:** This option disables expected return date at time of return in order to not charge the customer for extra daily rate.

- **Display reservation driver:** if this feature is enabled which is mostly used in shuttle rentals the driver drop down will appear at reservation page and you will be able to enter a driver for the reservation.

- **Do not rent to own desires customers:** if this option is enabled the system will prevent users from renting to customers who are marked as undesired.

- **Display full charges summary:** if this option is enabled everywhere in the system where you see the charges summary all the numbers will display regardless if they are 0 or not. For example if you have a daily rental and there is no weekly rates the weekly rate will still appear but display as 0. If you turn off this option the system will only display charges that have value on them but not the ones with 0 amounts.

- **Hide online rates**: Within the system if this option is enabled none of your rates that are marked as online will appear inside the system for users to select and will only be displayed on your website

- **Hide expired vehicle types:** with in the system if this option is enabled vehicle types that are expired will not be displayed anywhere in the system.

- **Allow sub rentals:** This option is mostly used in bicycle rentals which will allows you to add sub rental and. This feature is mostly used if you have the family coming to rent multiple vehicles from you and 1 person (usually the father) will pay for all of them.

- **Auto populate deposit a check out**: if this option is selected at the time of rental the system will automatically calculate and pre-populate the deposit amounts in the amount field in the credit card processing section of the screen.

- **Auto populate Checkin Odometer/Fuel:** At time of return the system will automatically fill in the fuel level and odometer so it’s not required for you to enter them by hand (this option is not recommend as it used for rentals without mileage and fuel tracking such as bicycle or scooter rentals).

- **Allow manual fuel charge**: With this option you can allow the user to enter a specific fuel charge amount which does not depend on the tank size or fuel charge per liter or a gallon it’s basically the total dollar amount to be paid by the customer.

- **Prepaid checkin:** if this item is selected regardless of the return date the customer is required to pay for the entire duration of rental origininally agreed at time of rental.

- **Update return location:** if this option is selected the system will automatically set the return location to the rental locations or pick up location.

- **Credit card process check box:** By selecting this option credit card processing checkbox will always be selected automatically everywhere in the system where you are processing.

- **vehicle search by detail lookup:** If this option selected and more advanced availability look up will be enabled for users to search for vehicles.

- **Enable version 3 Damage:** this is a new damage system that we have introduced in version 3. by selecting this option you are disabling the old damage system which you might have some data. With new version system allows you to enter damage locations and damage conditions and also upload inspection image to create your own custom damage set up.

- **Reservations availability by unit:** if this option is selected the system will look up the availability by group of vehicles and not individual vehicles in your fleet.

- **Vehicle status at check in:** With this feature you can set the status of the vehicle at the time of return.

- **Check out default transaction type:** With this feature you can pre select the transaction type such as payment or authorization of the time of rental.

- **Estimated KM/Mile option:** by enabling this option you can enter an estimated KM/Mile for the rental at the time of rental which means you can charge the client for the mileage ahead of time for the trip they are planning to go.

- **Discount**: You can setup the discount to be on time only or time and mileage together.

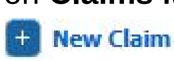
State/Provinces: Use this screen to add/remove different state names and state codes

Countries: Use this screen to add/remove different country names and country codes which are used across the application

Claims Management

Claims Management allows you to manage all your claims and accidents information such as claim documents, vehicles, contacts, etc. Claims management keeps track of every piece of data that you may have in an accident.

To Add a New Claim

1. Click on **Claims Management**
2. Click 

3. Enter the **Claims information** (see “Claims Information Fields” below for more details)
4. Click **Save**

To Modify Claims

1. Click on **Claims Management**
2. Click on the blue claim # link on the left
3. Modify the **claim information** (see “Claims Information Fields” below for more details)

4. Click **Save**

Claims Information

General information regarding the claim, such as customer name, claim date, claim location, etc.

Claims Information Fields

- **Claim Date:** The Date the accident happened. You would be entering your information for the first time.
- **Claim Close Date:** Once the claim process is completed on a claim, you can close it and identify its close date here.
- **Claim Type:**
  There are three types of claims:
    - Renter: is used for the person who has rented the car.
    - 3rd party: is used when your fleet vehicle had an accident with a 3rd party.
    - Other: is used for any other accident scenario which has affected one of your vehicles.
- **Location:** The location OUT of rental vehicle
- **Police Dept:** Police department accident was first reported to.
- **Police Rep:** Representative at the Police department
- **Current Status:** Select Open, Closed or Pending
- **Entered By:** UserID or employee who entered this claim
- **Documents In Hand:** Check when documents are received, Police report for example
- **Memo:** Any additional Notes

Vehicles: This section allows you to enter or modify the information for all the vehicles involved in this accident.

Customers & Contacts: Allows you to enter or modify all the contacts involved in this claim.

Expenditure and Payments: Use this section to manage your expenses and payments for this claim.

Repairs: This section allows you to enter all the repairs done on vehicles involved in this claims.

Financial / Commission Settings

Accounting

Used to set up export from Rent Centric to accounting software

- **GL Codes:** Set items as expense, income or general ledge codes used for QuickBooks
- **Export:** Export to QuickBooks

Commission

You may add a commission specific to a Rental or view/edit from the list

Franchise Financials

You may add set up how a franchise location will pay you.

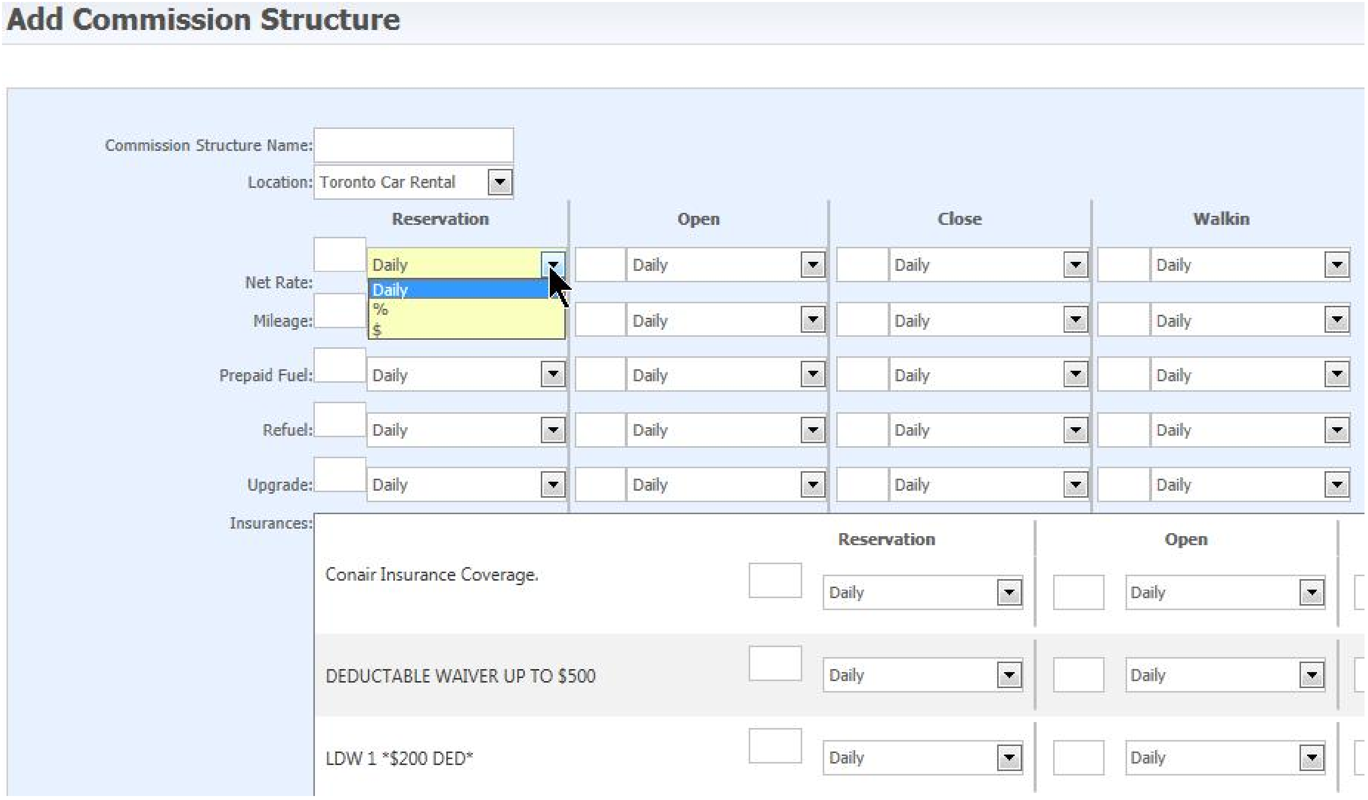
Referrals

You can manage your referrals from this screen. Referrals are companies or individuals who send you business with this tool you will be able to track referrals and run reports to find out who sent you the most business. Whenever you enter a new reservation or rental, you can specify a referral from the existing list or simply add a new one by clicking on Add New beside the drop down. In the referral management screen you are able to setup commissions, banking information etc. You can simply select the commission type, dollar amount $ or % percentage and enter the commission amount. You can also select the items which are commissionable in a rental. Based on these parameters, when you run the referrals report, you can see the calculated commission amount.

Commission Structure

You may set up as many commission structures as you wish and name them accordingly "Rental Clerk" for example. You would then select from the drop down menu in Users for Commission Structure.

You may select to pay based on Daily, % or flat $ amount. A walk in is a Rental without as associated reservation.

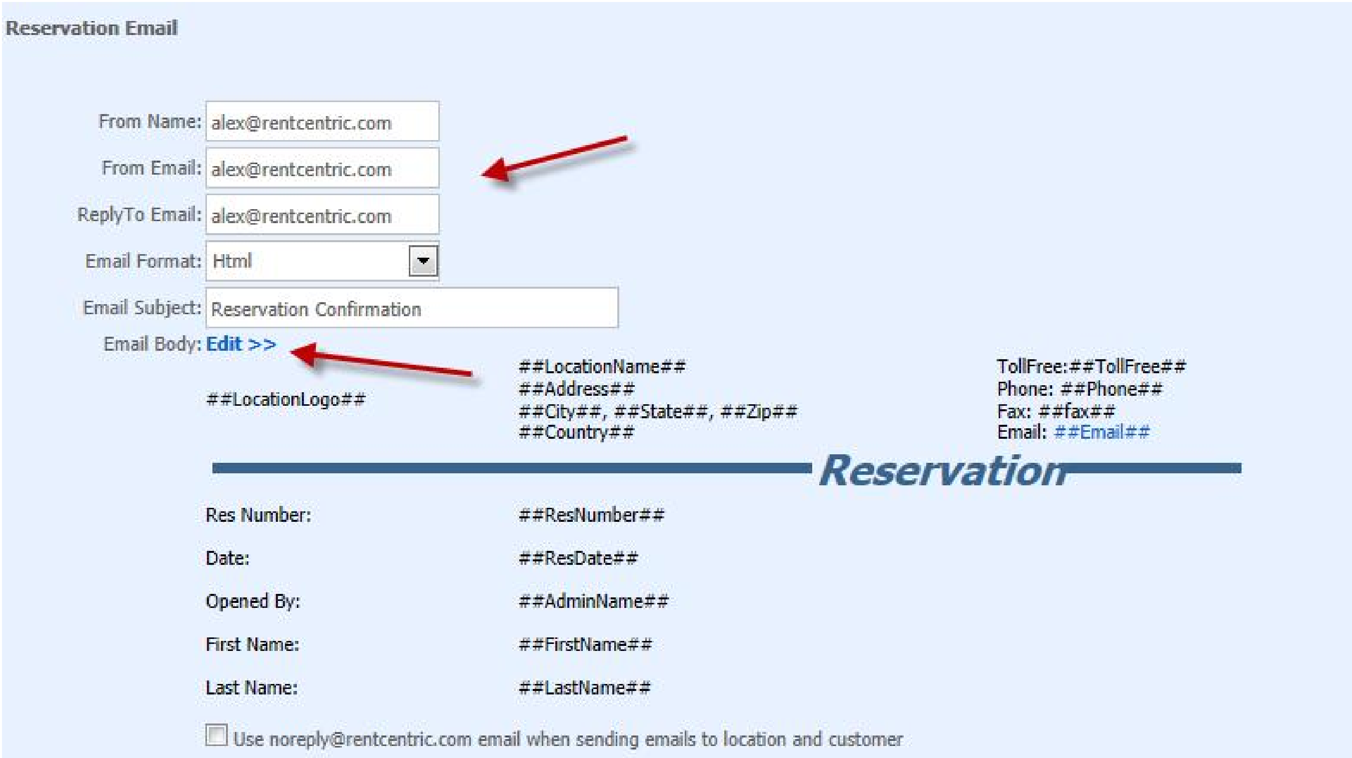


Website & Email Setup

Rent Centric's built-in real-time reservation website comes as a standard offering with your system. With many powerful features and extensive setup functionality you can fully customize your reservation website features and layout to meet your specific business needs such as rates and charges, look and feel. When customers make an online booking, you will receive a confirmation email which you can customize as well.

Email Setup

You can setup, customize and edit outgoing reservation emails.



- **From Name:** Select from Name which is usually your company name or "Your Company Reservations"
- **From Email:** Enter the from email address.
- **Reply To Email:** Enter email address where email replies will be sent to.
- **Email Format:** Select the outgoing format. HTML is always recommended which offers a much cleaner layout. You are able to store two separate email format, one in HTML and one in Text. By selecting the format drop down system will populate the saved format email layout from the database.
- **Email Subject:** Enter the email subject
- **Email Body:** Enter, customize and save the email content from this area. To Edit simply click on **Edit >>** link and modify the email body in the HTML editor.
- **Reservation Reminder:** Reservation reminder allows you to setup email reminders to go out in X number of Days previous to the reservation checkout date to remind customer of their upcoming reservation. Simply enter the subject, email content and select the number of days prior to checkout date for the email to go out automatically.

Add/Edit web pages

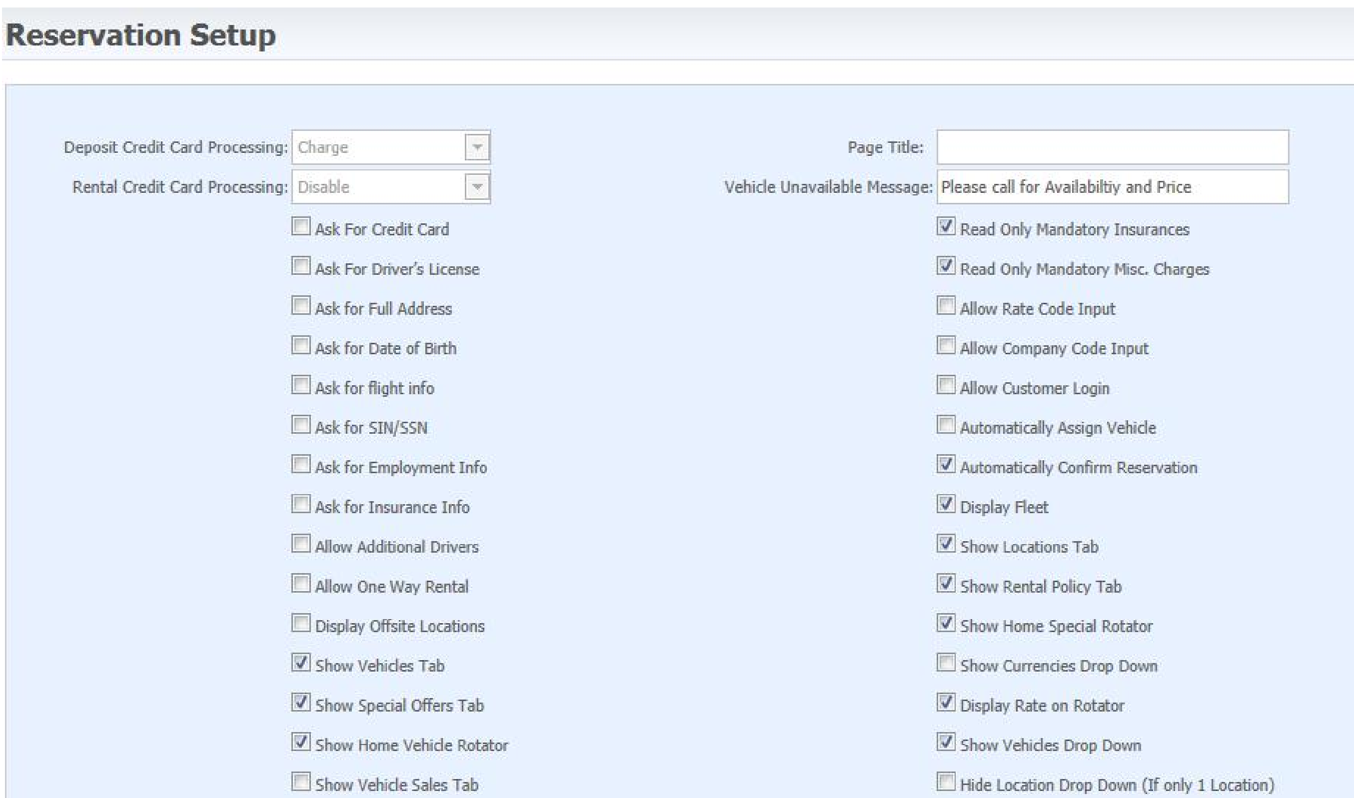
You can simply add/edit more tabs and add content to your website. At Add/Edit Webpage screen you simply search for your pages from the search field on the top or click Add New. When adding new Web Page simply select Page Type which can be a webpage (tab) on your website or an external link to another website which will hide the body area and you can enter link. Make sure you enter the external link as http://www.SampleWebsite.com/page.htm. Target can be pop up or same page which makes the tab pop up a new window or remain on the same window. Enter the content of your webpage and click on save.

File Explorer

You are able to upload images, CSS files and other types of files used in customizing your online reservation from the File Explorer page. This feature is especially useful in preventing security warning when referencing to an external file by simply uploading the file locally to Rent Centric folders. Click on Upload and browse for your file to upload to Rent Centric Custom Folder. Once file is uploaded you can use /Custom/FileName.jpg to access the file.

Reservation Setup

You are able to fully customize your reservation website features and functionality from Reservation setup for example turning specific features on/off.



- **Credit Card Processing:** Choose to authorize or charge customers credit card at time of reservation. Remember you need to turn on Ask for Credit Card Info so by collecting credit card information, you would be able to authorize/charge customer's credit card. Remember this option works if are setup with a payment gateway to process real time credit card transactions.
- **Ask For Specific Information:** Turn these options ON if you would like to ask your customers for specific information when they make an online booking on your website. It will simply display the fields for input.
- **Allow Additional Drivers:** Turn this option ON to allow your customers enter up to two additional drivers when making reservation on your website.
- **Allow One Way Rental:** This option allows your customers to pickup and drop off at different locations.

- **Display Offsite Locations:** By turning ON this option your offsite locations will display in the location drop down list. Your customers will be able to select the offsite locations as their preferred pickup or drop off locations. All the rates and information will still come from the parent location and the only information from child location would be the Pickup and Drop-off location of the reservation.
- **Show *Different* Tabs:** Buy turning on and off these options you can show/hide different tabs on your website.
- **Vehicle Unavailable Message:** You can specify a custom message to be displayed when a specific vehicle type is not available for booking.
- **Read Only Mandatory Insurance/Misc Charges:** with this option you make your mandatory insurances or misc charges read only (disabled) so your customers will not be able to uncheck them on your website. For example your rental operation might have mandatory insurances on specific vehicle types.
- **Allow Rate Code/Company Code Input:** By turning on this option your customers are able to enter a specific rate code or their company code to get preferred or discount rates. For example you can add a new rate called "Ski" and by providing this code to your customers they will be able to visit your website and enter "Ski" in the Discount Code to get the preferred rate. For company code, if you have setup Companies in Rent Centric with special Corporate Rates, your clients are then able to enter the Company Code into the text box and get the special rate you designated that company.

- **Allow Customer Login:** By turning ON this option, your customers are able to click on login tab and login to their account by entering either confirmation number and last name or last name and password (you need to provide them) and view/edit their reservations, previous rentals and print them, edit their personal information and make a new reservation.
- **Automatically Assign Vehicle:** By turning ON this option, when customers create an online reservation, Rent Centric system will automatically reserve a specific vehicle from the selected type from your fleet. It's recommended to turn this option OFF since there is possibility of a spammer or competition to book all your vehicles with junk information.
- **Automatically Confirm Reservation:** By turning ON this option, when customers create an online reservation, by default the reservation will be confirmed. If this option is OFF, all reservations require a user to view and then confirm the reservation made online. It's recommended to turn this option OFF since there is possibility of a spammer or competition to book all your vehicles with junk information.
- **Show Home Special Rotator:** By turning ON this option your vehicle rotator will display online on your homepage.
- **Rate Type Priority:** You can specify which rate types you would like to display first and give priority. For example if you have two rates for the requested vehicle type, one has standard rate type and one is multiday rate type, with this utility you can give priority to either rates to display first and if not available to show the next rate in the list.

Website design

You can fully customize the look and feel of the website with this screen

- **Header HTML:** Enter the HTML code for the website header section.

- **Footer HTML:** Enter the HTML code for the website Footer section.
- **Google Analytics Code:** Enter your Google analytics tracking code to track your leads for more information visit www.google.com/analytics/
- **Google Conversion Code:** Enter your Google conversion code for tracking your visitors when they complete the booking. When inserting conversion code replace the google_conversion_value with ##Total## so the reservation total amount would show when code loads. For more information please search for Google conversion.
- **Background and Text color:** Select your background and text colors.
- **Background Image:** Browse and upload background image
- **Image Logo:** Browse and upload your logo image
- **Style Sheet:** Enter you own CSS style sheet code to override default web customer style sheet. This will allow you to customize the look and feel of the website.
- **Display Skin:** You can select from preset skins and color schemes which come with Rent Centric.
- **Compact WebCustomer Width:** Enter the width of compact web customer to your desired pixel.

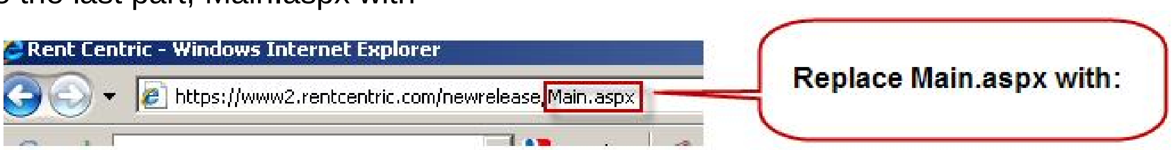
Widget/Rotator Setup

You can place Rent Centric reservation widget on your homepage inside a frame or an Iframe. Once clients select the location and dates to continue, it will redirect the clients to reservation process step 2. If you have a custom reservation website please enter the Online Reservation Page name in the text box. Also you can have the widget as POP up or same window when clicking on Continue to go to step2.

Res. Website link for PC and Mac

You will find your default webcustomer online reservation link here

To access your online reservation website, on your address bar where you see rentcentric.com replace the last part, Main.aspx with



Webcustomer/Webcustomer.aspx

To access the standard online reservation website (full website)

Webcustomer/Widget.aspx

You can place Rent Centric reservation widget on your homepage. Once clients select the location and dates to continue, it will redirect the clients to reservation process step 2. (Please refer to Widget Setup in this manual)

Webcustomer/Rotator.aspx

You can place Rent Centric vehicle rotator on your homepage. Once client click on a vehicle, they will be redirected to Rent Centric reservation step 2.

On your website you can display specific pages from Rent Centric Webcustomer by adding the page name in a query string like examples below to show those specific pages.

Webcustomer/Webcustomer.aspx?Page=Vehicles
Webcustomer/Webcustomer.aspx?Page=Locations
Webcustomer/Webcustomer.aspx?Page=RentalPolicy
Webcustomer/Webcustomer.aspx?Page=VehicleSales

Example:
https://www2.rentcentric.com/ClientXXXX/webcustomer/WebCustomer.aspx?Page=Vehicles

> **Note:**
> If you plan on taking credit card information it is mandatory for you to use the secure link https:// to access Rent Centric online reservation website. Please remember if you user secure are referencing to an external style sheet or HTML headers or footers, remember if you selected https for secure site
>
> 
>

Res. Website link for Mobile Devices
Webcustomer/MobileWebcustomer.aspx
To access Mobile reservation website designed for iphone or other mobile browser

Edit Quote Email: Click to edit the outgoing email message when sending quotes to your customers.

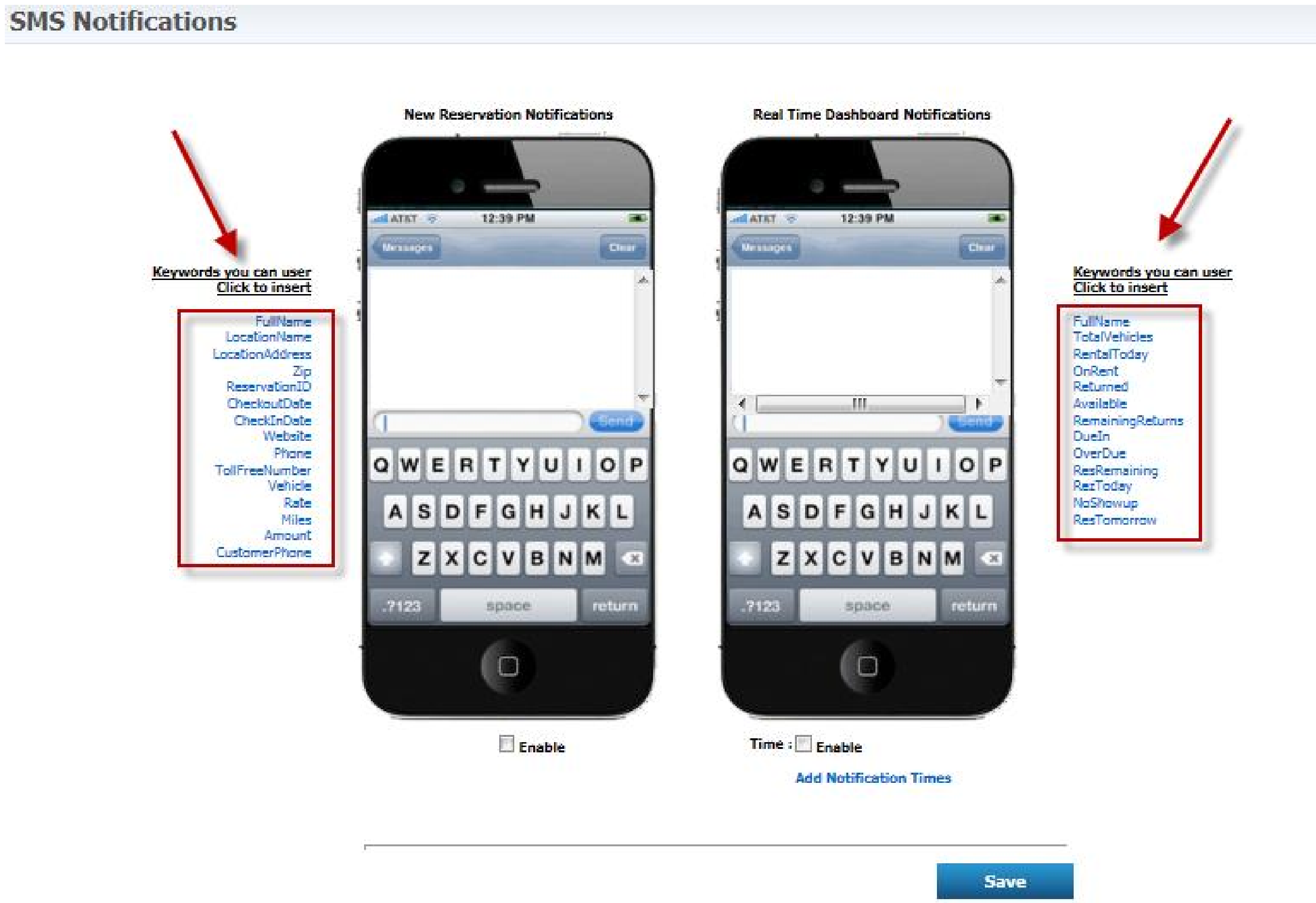
SMS Notifications

Utilize SMS notifications to send real-time SMS text messages to your device when:

1. Someone makes an online reservation on your website
2. Get updates on your rental operation such as receiving real-time dashboard information

You can use keywords in your outgoing SMS text message to get replaced with real-time information. For New Reservations use the keyword to the left and for Real-time dashboard notifications use keywords to the right.

To enable and disable the real Real-time dashboard notifications use the Enable and specify the time of day when you would like to receive these updates



SMS Notification Users

You can specify users with their phone numbers to receive the SMS notifications. After you setup the user, click on Send Test SMS to try the setup.

SMS Providers

You may view, edit or add a new provider.

SMS Quote Messages

You may view, edit outgoing SMS text message when sending quotes to your customers.

Point Of Sale

With this utility, you are able to add merchandise inventory, create purchase orders and printing invoices by creating new orders.

Email Marketing

With this tool you can send out marketing email to your customers based on different filters.

Tasks & Messages

Rent Centric helps substantially increase productivity and improve internal communication with its task system. The feature allows for easy communication, between employees and different locations. This page option works like an email system. Each time a task is opened for user, when the user logs in the system will notify them that they have a task waiting for them. They could update, add or even delete task from their screen. In addition the system will email the user with their task making it easy for them to view task from their email clients.