



Getting Started Guide

Thank you for making the choice to use RentalTrax as your inventory software solution. Getting started can be very confusing with any software solution; we hope to make that process simple for you. With this getting started guide, we will provide you with the necessary steps to get your software off the ground and running efficiently. You will be able to use this guide in conjunction with the RentalTrax Manual as well as the online How-To Video's.

We will assume that you have been able to access your system online, and have had success logging in. If you have not been able to log in to your system, please send an email to info@rentaltrax.com

So without further delay, let's get your system setup.

Step One: Basic Settings

Access: Settings > Basic Settings

Purpose: Establish the basic company information, logo upload, hours of operations and more.

Online Manual Link: <https://wio.zendesk.com/entries/24274571-Basic-Settings>

How-To Video Link: <http://www.wiosoft.com/common/videos/settings>

Image:

1 Edit Master data

2 Company information

3 Company: RT SAMPLE COMP

4 VAT number: 15935

5 Address: 15935

6 Zip code: N6P4G2

7 City: Ottawa

8 Country: Canada

9 Tell.: 8889254238

10 E-mail: info@rentaltrax.com

11 Website: www.rentaltrax.com

12 Logo: RentalTrax

13 Delete logo: Yes No

14 Choose File No file chosen

15 Watermark: Watermark on order Choose File No file chosen

16 Order settings: Disable stock control: Yes No

17 iCal

18 Link: http://demo.a.rentaltrax.com/calendar.php?key=dba3e8ac1bde9485b5447c918fa0876

19 Generate new calendar key

20 Banking details

21 Name of bank:

22 Bank short code:

23 Bank account number:

24 Bank swift code:

25 E-mail settings

26 E-mail signature: Brian Itaxfield
RentalTrax
www.rentaltrax.com
info@rentaltrax.com
(888)925-6238

27 E-mail copy to: rentaltrax@gmail.com

28 Invoice settings

29 Standard time allowed for payment: 8

30 Invoice # start: 6676

31 Standard debtor account: 12545

Step Two: Payment Methods

Access: Settings > Payment Methods

Purpose: Establish the payment methods that your company will accept. RentalTrax is NOT a merchant service provider; however, you will be able to label and track payments within your system based on the information that you upload.

Online Manual Link: <https://wio.zendesk.com/entries/24283246-Payment-Methods>

How-To Video Link: <http://www.wiosoft.com/common/videos/paymentmethods>

Image:

1 Payment method directory

2

3 New Payment method

| # | Name |
|----|-------------------|
| 13 | Visa |
| 7 | Online payment |
| 3 | Invoice |
| 10 | Internal Transfer |
| 12 | Credit Card |
| 9 | Check |
| 8 | Cash |
| 11 | Barter |
| 6 | Bank Transfer |

Listing 9 out of 9

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Step Three: E-Mail Templates

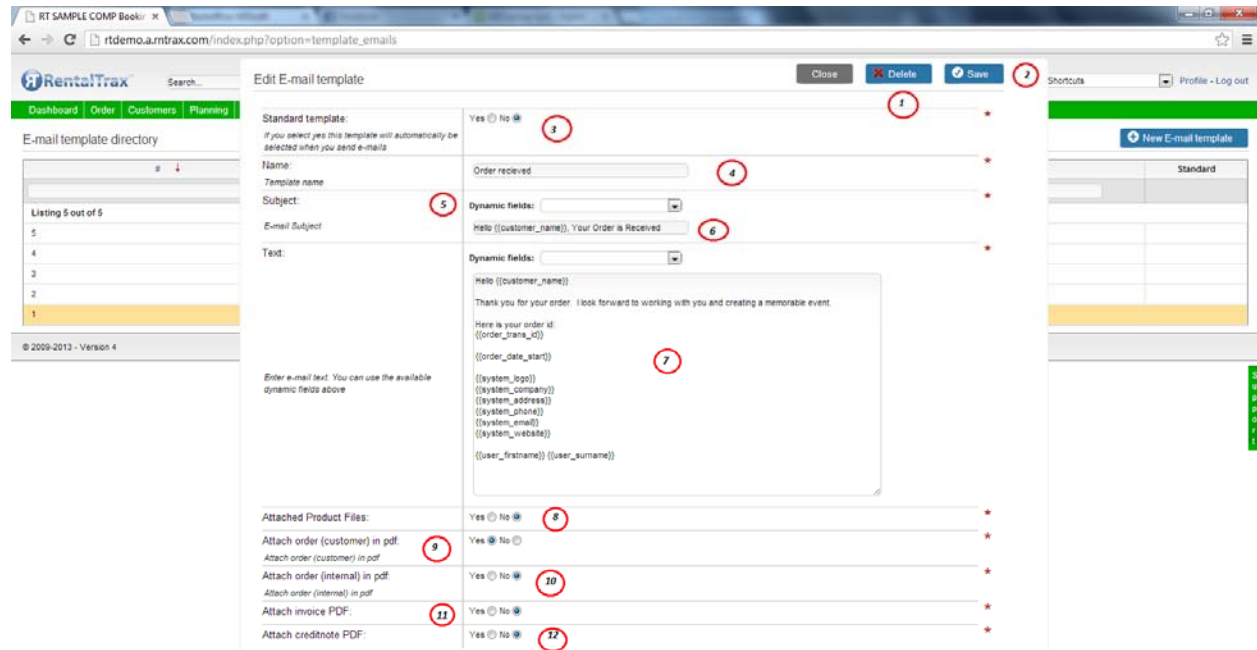
Access: Settings > E-Mail Template

Purpose: Use the template creator to save yourself from having to write routine emails constantly. Write the e-mails once, and use Dynamic Fields to create a personal touch to your communications. There is no limit to the amount of templates you can create, so write as many as you wish. Some examples include: Order Received, Satisfaction Survey, Delivery Notice, Payment Reminder, Etc.

Online Manual Link: <https://wio.zendesk.com/entries/24283256--E-Mail-Templates>

How-To Video Link: <http://www.wiosoft.com/common/videos/emailtemplates>

Image:



Step Four: Condition Templates (Contract)

Access: Settings > Condition Templates

Purpose: Use the Condition Templates creator to insert your terms and agreements for your clients to receive. You can enter as many contracts as you like and either have them set to specific order types or available for all orders.

Online Manual Link: <https://wio.zendesk.com/entries/24274421-Condition-Template-Setup>

How-To Video Link: <http://www.wiosoft.com/common/videos/condtemp>

Image:

The screenshot shows the 'Edit Contract template' form in the RentalTrax application. The form is titled 'Edit Contract template' (1) and includes a 'Standard contract' checkbox (2) with a 'Yes' radio button selected. The 'Name' field (3) contains 'Condition 1'. The 'Order type' dropdown (4) is set to 'Rental'. The 'Dynamic fields' dropdown (5) is set to 'Text'. The main text area (6) contains the following terms and agreements: 'these are the terms and agreements to your rental.', '1. You break it, you bought it', '2. Don't leave items out in the snow', '3. Bring everything back.', 'Customer Signature: _____', 'Agent Signature: _____', and '({{order_date_start}})'. The form also includes 'Back', 'Delete', and 'Save' buttons (7, 8, 9) and a 'Background Tasks' section at the bottom right.

Step Five: User Groups / User Creation

Access: (User Group) Settings > User Groups (Users) Settings > Users

Purpose: In order to give access to the system for your employees, they must first be created as Users. If you would like advanced tracking of their progress by group, you can establish their user group first. When you are creating the Users, you can establish their level of access, contact information, etc.

Online Manual Link: (User Group) <https://wio.zendesk.com/entries/24276512-User-Group-Creation>
(Users) <https://wio.zendesk.com/entries/24283366-User-Creation>

How-To Video Links: (User Group) <http://www.wiosoft.com/common/videos/groupcreate>
(Users) <http://www.wiosoft.com/common/videos/usercreate>

Image:

The screenshot shows the 'Edit User' form in the RentalTrax application. The form is titled 'Edit User' and has a 'Back' button and a 'Save' button. The form fields are as follows:

| | | |
|---------------|---|----|
| Job function: | Owner/Operator | 12 |
| First name: | My | * |
| Last name: | Business | * |
| E-mail: | info@rentaltrax.com | * |
| Tell: | 888-925-6226 | |
| Access level: | Administrator | |
| User group: | Ownership | |
| Active: | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> | * |
| Commission: | 5.00 % | |
| New password: | <input type="checkbox"/> | * |

Numbered callouts (1-12) are placed on the form: 1 on the title, 2 on Job function, 3 on First name, 4 on Last name, 5 on E-mail, 6 on Tell, 7 on Access level, 8 on User group, 9 on Active, 10 on Commission, 11 on New password, and 12 on the Job function dropdown. A vertical 'Support' button is visible on the right side of the form.

Step Six: Product Creation (Categories > Tax Class > New Product)

Access: (Category) Products > Categories > New Categories

(Tax Class) Products > Tax Class > New Tax Class

(New Product) Products > New Product

Purpose: It is now time to enter some of your inventory. This process can take awhile; however, for the initial setup, we are only going to enter a few *sample* inventory items. Once you have decided that RentalTrax is the solution for you, we can do a product import for you to upload your entire inventory. In order to properly setup your items though, we need to first establish your categories (organized groupings of items), tax class (charged per item) and then create the new products.

Online Manual Links:

(Categories) - <https://wio.zendesk.com/entries/24274681-Category-Setup>

(Tax Class) - <https://wio.zendesk.com/entries/24283556-Tax-Class-Creation>

(New Product) - <https://wio.zendesk.com/entries/24278757-New-Products>

How-To Video Links:

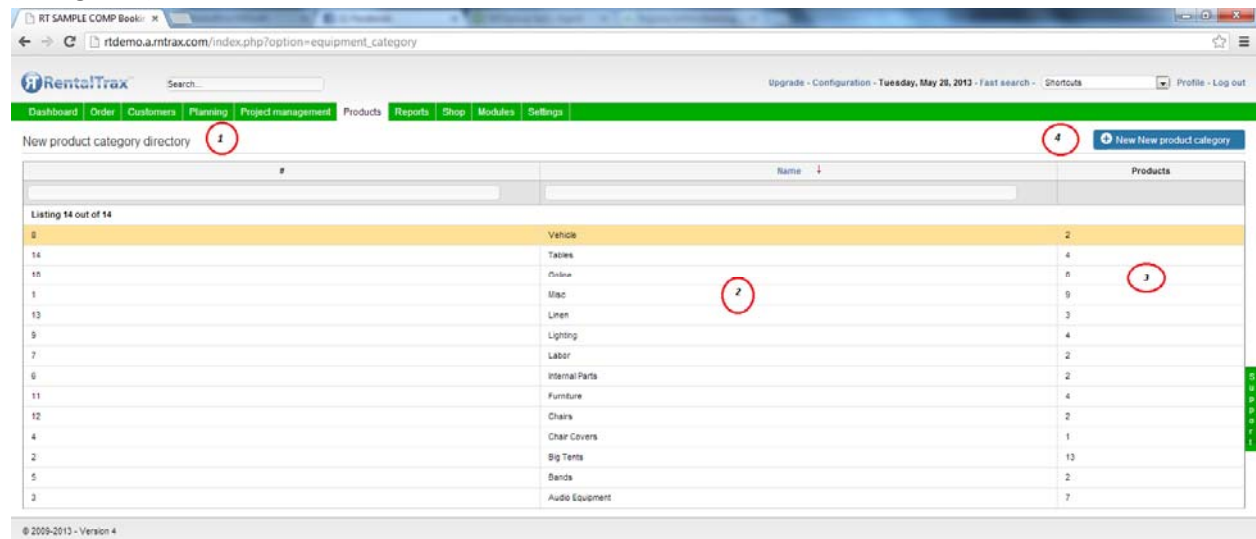
(Categories) - <http://www.wiosoft.com/common/videos/categorycreate>

(Tax Class) - <http://www.wiosoft.com/common/videos/taxclass>

(New Product) - <http://www.wiosoft.com/common/videos/productcreate>

Image:

(Categories)



(Tax Class)

RT SAMPLE COMP Book: x
 demo.a.rntrax.com/index.php?option=tax
 Upgrade - Configuration - Tuesday, May 28, 2013 - Fast search - Shortcuts - Profile - Log out

Dashboard | Order | Customers | Planning | Project management | Products | Reports | Shop | Modules | Settings

Taxclass directory **1** **4** [New Taxclass](#)

| # | Name | Tax |
|---|------------------------|----------------|
| 2 | Val free | 0.0% |
| 4 | Postage 2 | 0.0% |
| 7 | Online Tax | 25.0% 3 |
| 1 | Local vat | 17.5% |
| 5 | HST | 13.0% |
| 8 | GST | 8.0% |
| 3 | Artistic Entertainment | 0.0% |

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(New Product)

General **1** | Files | Serial numbers | Shop | Gallery | Attributes | Related products | Forced buy **18**

Product information 2

Type: **3** Rental

Category: **4**

Taxclass: **5**

Number: **6**

Name: **7**

Barcode: **8**

Active: **9** Yes No

Price: **10** **13**

Factor group: **11**

Replacement price: **12**

Number in stock: **13**

Weight: **14** kg

Location: **15**

Order text: **16**

Dealer: **17**

Step Six: Play with the System

That's it! You have now gone through the first stages in getting your Rental Management Software System setup. Now it's time to use it.

In order to find out if the system works for you, and to get used to the program, you now need to enter some orders, and feel out the system. Go to Orders > New Order and open up the New Order Creation Screen. View the Online Manual Here: <https://wio.zendesk.com/entries/24288273-Order-Entry>.

For a How-To Video on entering Orders, please visit:

<http://www.wiosoft.com/common/videos/orderent>

If you have any questions regarding the use of the system, or it's application to your business model, please feel free to contact us at the following information:

E-Mail: info@rentaltrax.com

Phone: (888)925-6236

Website: www.rentaltrax.com

We appreciate your business and you allowing us the opportunity to be a part of your business growth.

Thank you for choosing RentalTrax for your Inventory Software Management Solution.