Template Upload Guide

After you have tested out your RentalTrax system and have made the decision to use the program for your business, we can help you get started by uploading your Inventory and Customers for you. In order to do this function, we need you to fill out the excel templates accurately to ensure that your products and customers are 100% correct within your system

This guide will walk you through how to fill out the templates correctly and provide you with an understanding of what each column means. Filling out the templates and uploading them into your system can save you many hours of data entry labor.

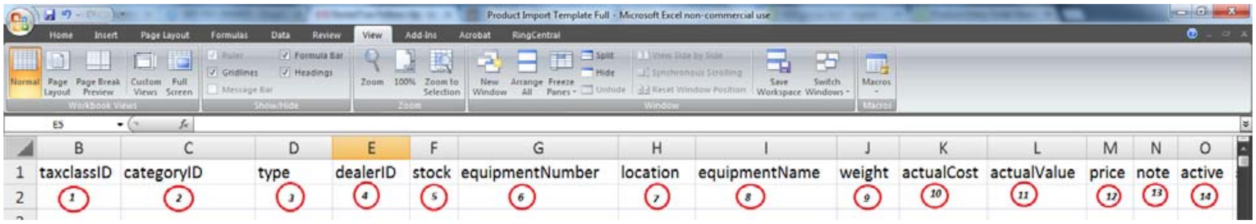
NOTE: Please ensure that you have tested out the RentalTrax system *FIRST* by entering a few products manually into your system. Once you have made sure that the RentalTrax system fits your business needs, then you can move on to the full inventory and customer upload.

IMPORTANT: Fields that are highlighted in green are REQUIRED FIELDS and must be filled out.

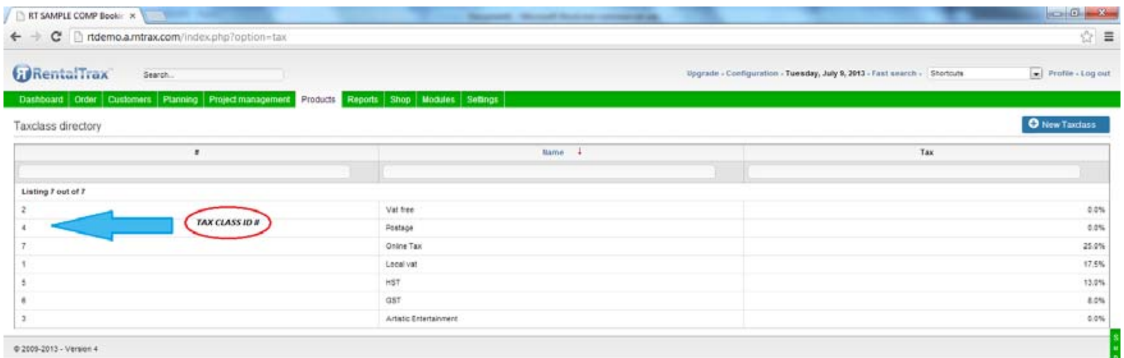
Table of Contents

Product Upload

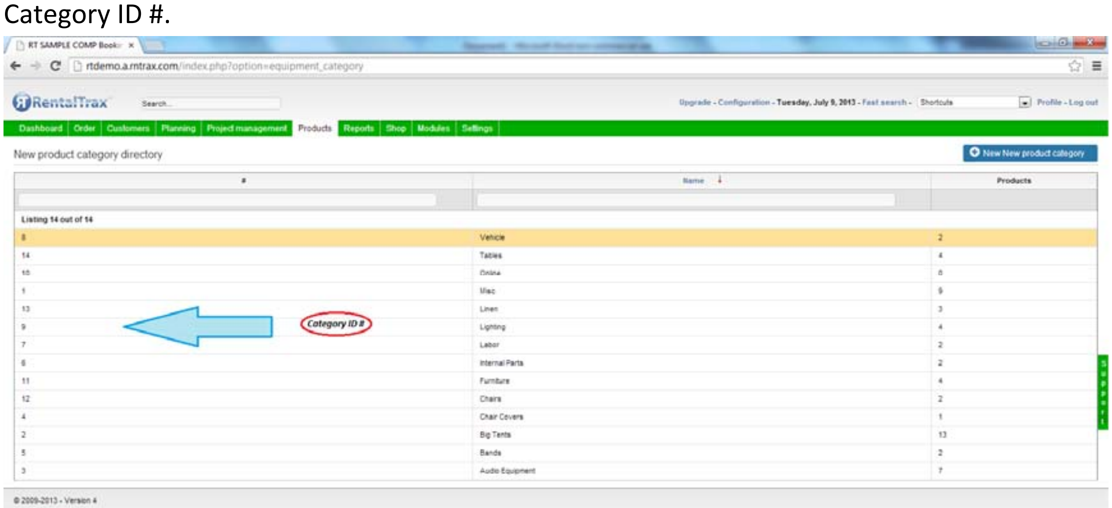
Here is a brief understanding of the standard columns in the product import template.



1) *Tax Class ID* – The tax class ID is a number that corresponds with the number associated to the tax class in your RentalTrax system. If you have yet to create your tax classes within your system, do so now by logging in and going to Products > Tax Class > New Tax Class. The Left column will show the Tax Class ID #.



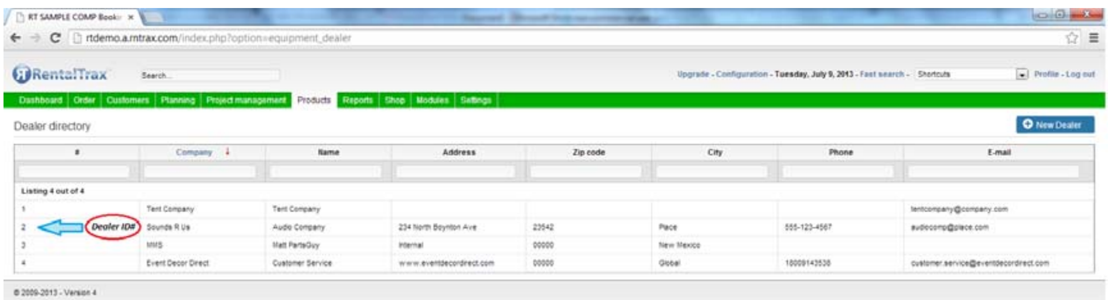
2) *Category ID* – The category ID is a number that corresponds with the number associated to the categories in your RentalTrax system. If you have yet to create your categories, do so now by logging in and going to Products > Categories > New Categories. The left column will show the Category ID #.



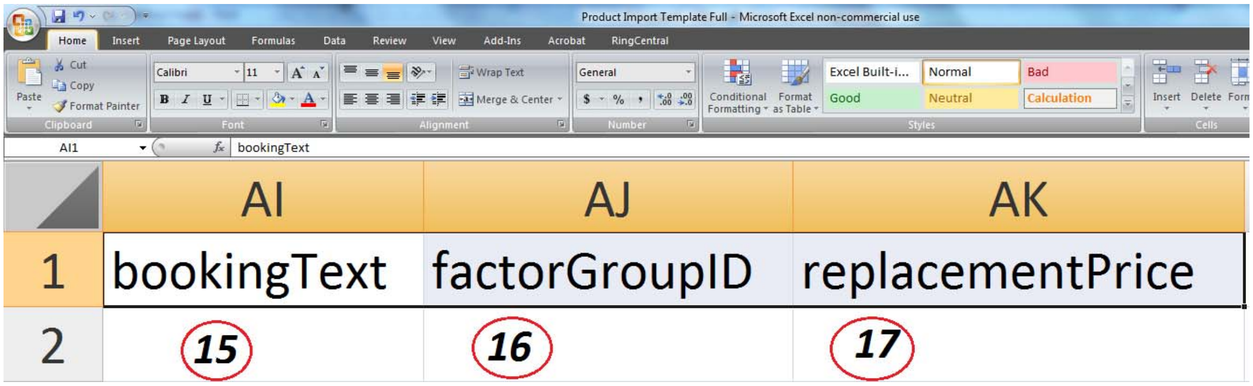
3) *Type* – You have five options for the type of products that you can create in your system.
    a. *Rental* – Any item in your inventory that has a date of rental and an expected date of return to your inventory

b. *Standard* – These are sale items. Inventory items that are standard are NOT expected to return to your inventory
c. *Virtual* – These products are any non-physical products in your inventory. They can be fees, charges, costs, etc.
d. *Package* – This product type includes many products being packaged together. This product type is NOT AVAILABLE for import. You must setup your packages manually inside the system
e. *Sub Rent* (dry hire) – Use this product type to enter in products that are not part of your inventory, but are products that you rent out from other companies to fulfill your clients orders.

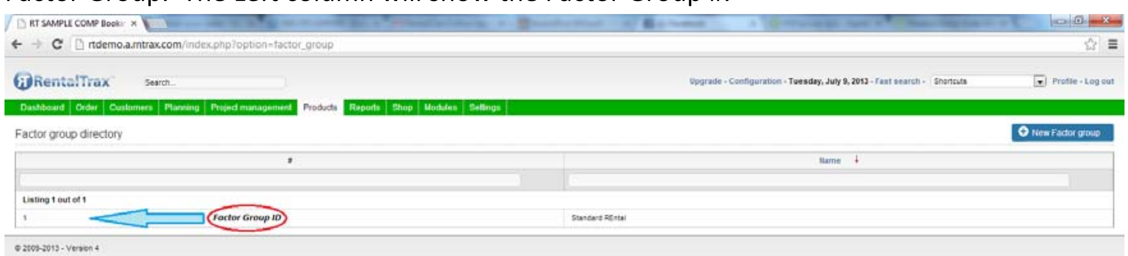
4) *Dealer ID* – The Dealer ID is a number that corresponds with the number associated to the Dealer ID in your RentalTrax system. If you have yet to create your Dealers within your system, do so now by logging in and going to Products > Suppliers > New Supplier. The Left column will show the Dealer ID #.



5) *Stock* – Enter in the quantity you have of this product.
6) *Equipment Number* – This is a unique identifying code created by you to identify this product. This can contain both numbers and letters. HINT: Make the equipment numbers with your dealer's numbers for ease of ordering.
7) *Location* – Enter the location of the product within your inventory. HINT: Entering "Warehouse" is very vague. Save your staff time by entering the location within the warehouse as well (i.e. WH, Aisle 3, Sec 2, Shelf 1)
8) *Equipment Name* – Enter the name of the product that you are adding to your inventory. This is not the selling text that will appear on the order line, but the actual name of the product.
9) *Weight* – Enter the weight of the product in Kilograms. This will affect your delivery planning if you have weight limits on your vehicles.
10) *Actual Cost* – Enter the price that you paid to purchase this inventory item. This will allow you to calculate the cost of your order later when using the system.
11) *Actual Value* – Enter the value of your product based on this product line. This is calculated by multiplying the cost of the item by the quantity of the item.
12) *Price* – Enter the price that you charge for this item as a standard rental
13) *Note* – This column is inactive and you DO NOT have to fill it out
14) *Active* – This column is used to denote whether the product is available in your system or not. If it is available, enter a "1". If it is not available, enter a "0".

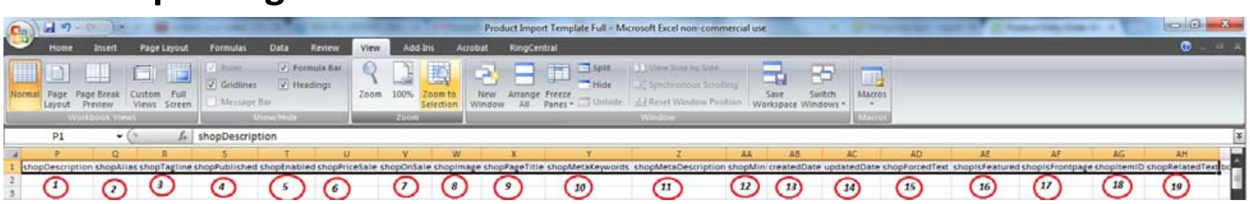


15) *Booking Text* – Enter the descriptive text you wish to have on the order line for your customers to see. This should be your sales pitch for the item
16) *Factor Group ID* – The Factor Group ID is a number that corresponds with the number associated to the Factor Group in your RentalTrax system. If you have yet to create your Factor Groups within your system, do so now by logging in and going to Products > Factor Group > New Factor Group. The Left column will show the Factor Group #.



17) *Replacement Price* – Enter the price that it would cost to replace the product if it were lost or damaged beyond repair and you needed to charge the client for this product.

WebShop Categories



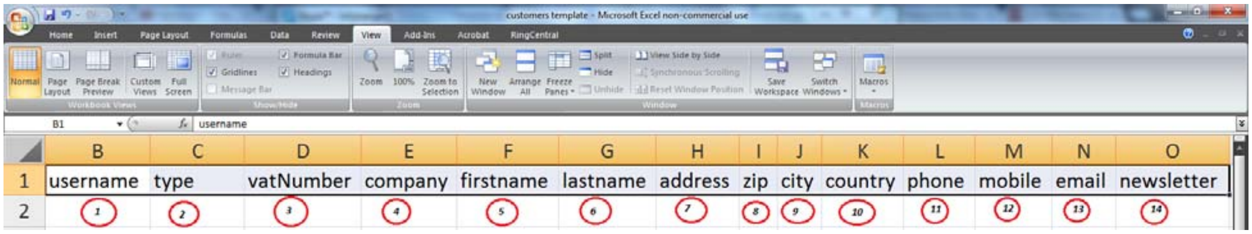
The WebShop is a module that you can add to your system that will allow you to create an online store for your Rental Management System. If you have activated the WebShop and would like to enter the information for the shop into the import, you can do so using these columns.

1) *Shop Description* – Enter the short description that you would like displayed when a client is looking at your product in the shop.
2) *Shop Alias* – Enter a short form description for the product that will display in the address bar when your clients have accessed the product in your shop.
3) *Shop Tagline* – Enter a very short description (max 50 characters) to be used as a feature line for the product on your shop.

4) *Shop Published* – This column will decide whether or not to publish the product as a feature in the shop or not. To make the product visible, enter “1”. To make the product invisible (meaning you do not wish to use this product in your shop), enter “0”.
5) *Shop Enabled* - This column will decide whether or not the product is visible in the shop or not. To make the product visible, enter “1”. To make the product invisible (meaning you do not wish to use this product in your shop), enter “0”.
6) *Shop Price Sale* – You can provide a shop specific price for your products by entering the sale price here. This price will override the regular price of the product for Web Shop orders only.
7) *Shop On Sale* – Use this column to activate your sale price for the product. If you wish the system to activate the sale, enter “1”. To leave the sale inactive, enter “0”.
8) *Shop Image* – Do not fill this column out. This is computer generated to include the link to your image once you have uploaded the image at a later setup date.
9) *Shop Page Title* – This is the heading that is to appear at the top of the page that this product will be displayed on. This heading must be consistent with all the products on that page to avoid any errors.
10) *Shop Meta Keywords* – This area will allow you to enter all of the keywords for Search Engine Optimization (SEO) that are to be tagged with this product. SEO can help with Google preferences and how you appear in search engines. Separate the words by using a comma (“,”)
11) *Shop Meta Description* – Enter the text that will appear on the search engine when someone searches you using Google, Yahoo or other search engines.
12) *Shop Minimum Quantity* – Enter the minimum quantity of a product that you require for purchase through the website. You may not have a minimum quantity for standard sales and may wish to change that for online orders.
13) *Created Date* – Do not fill this column out. This is computer generated the day you create the product in the shop.
14) *Updated Date* - Do not fill this column out. This is computer generated the day you update the product in the shop.
15) *Shop Forced Text* – Enter the text that you wish to display if purchasing this product requires that you *must* follow another action. For Example; if you purchase an item that requires that you must purchase Insurance. Enter how you would word that forced purchase to the client.
16) *Shop is Featured* – If you wish for this product to be featured in the shop, enter “1”. If you wish for the product to remain a standard product in the shop, enter “0”.
17) *Shop is Front Page* – If you wish for this product to be the display picture for the front page of the webshop enter a “1”. If you wish for this product to remain a standard product in the product category, enter a “0”.
18) *Shop Item ID* – Do not fill out this column. This is a computer generated number that the system will fill in for the product.
19) *Shop Related Text* – Enter the text that you wish to display if you were promoting (or upselling) a separate product to go along with the sale of this product line.

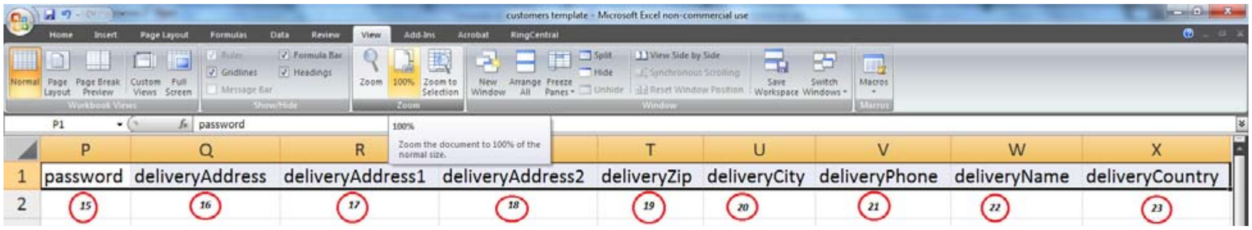
Importing Customers

RentalTrax can provide you with an import tool to transfer your old clients into the system and allow you to maintain your contact information database. Follow these steps to import your customer information.

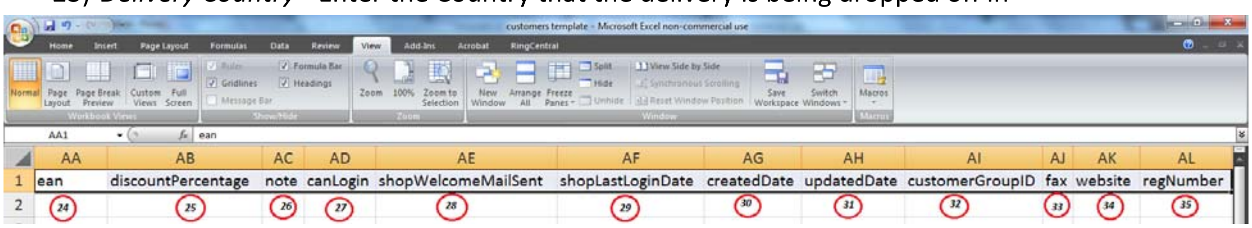


PLEASE NOTE: The information that you enter into the customer database will be used to auto-fill dynamic fields within the system. Please ensure that the information you enter is correct and that you have permission to use the information within your system.

1) *Username* – If you are using the WebShop Module, you can enter the unique username that is provided for your clients. If you have yet to use the Webshop module and are just getting started with the system, leave this column empty.
2) *Type* – Choose between Business Clients or Person clients
3) *VatNumber* – Enter the tax ID code for the client. Depending on where you are in the world, this area can be called Tax #, VAT #, GST #, etc.
4) *Company* – Enter the name of the company that this client works for. NOTE: The RentalTrax system will not join clients from the same company together. Each client is given their own specific client information section.
5) *First Name* – Enter the First Name of your client
6) *Last Name* – Enter the Last Name of your client
7) *Address* – Enter the mailing address of your client. Limit this field to the street address and/or postal box as you will be given the opportunity to fill out the rest of the address in later fields.
8) *Zip* – Enter the Zip Code for the clients mailing address
9) *City* – Enter the City that the client is located in
10) *Country* – Enter the Country that the client is located in
11) *Phone* – Enter the contact phone number for the client.
12) *Mobile* – Enter the mobile phone number for your client. This will be important if you activate the SMS text module.
13) E-Mail – Enter the email address for your contact. This field is mandatory and must be filled out. Please be sure that you fill this out correctly as the system relies heavily on email communications.
14) *Newsletter* – Enter a “1” if the client has provided you with permission to send communications to them. Enter a “0” if they have declined permission for email communications.

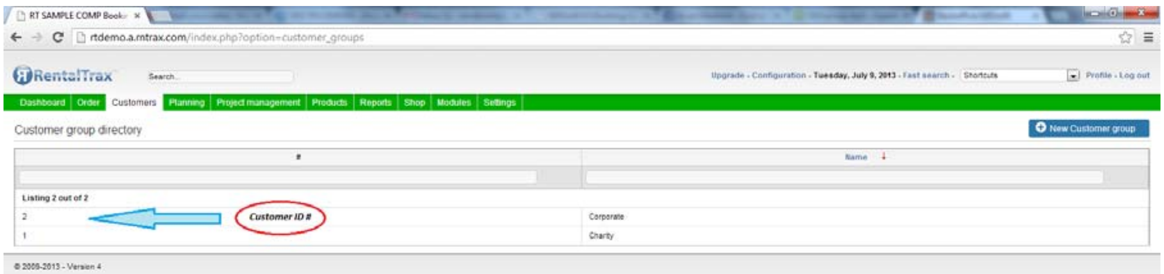


15) *Password* – This column is only necessary if you are using the WebShop module. This is where the password is created for the clients that are accessing your WebShop
16) *Delivery Address* – Enter the street address that you typically deliver to this customer
17) *Delivery Address 1* – Use this field if you need more room for your delivery address for this customer
18) *Delivery Address 2* - Use this field if you need more room for your delivery address for this customer
19) *Delivery Zip* – Enter the zip code for the delivery address that you typically use when delivering product to this customer
20) *Delivery City* - Enter the City for the delivery address that you typically use when delivering product to this customer
21) *Delivery Phone* – Enter the contact phone number for the client that you typically use when delivering product to this customer. This phone number can be different than the standard phone number for your client as it is the contact information for the delivery site
22) *Delivery Name* – Enter the name of the person that will be on site when the delivery is being dropped off. This can be a different name than your contact as your contact is not always the one accepting the delivery.
23) *Delivery Country* - Enter the Country that the delivery is being dropped off in



24) *EAN* – Enter the customers EAN (Registration) number here
25) *Discount Percentage* – If the client is being offered a discount for *online shopping only* then you can enter that percentage here. NOTE: This will not affect any manual orders that you place in the system
26) *Note* – If there are any internal notes that you wish to enter on the customers file, you can do so by entering the note here
27) *Can Login* – If the customer is able to log in to your webshop through their access code, enter a “1”. If you do not wish for the customer to be able to access their account in your webshop, enter a “0”
28) *Shop Welcome Mail Sent* – If the customer is to receive a welcome email when they place an order in the WebShop, enter a “1”. If the customer is not to receive a welcome email, enter a “0”

29) *Shop Last Login Date* – Do not fill this column out. This is a computer generated column that will provide the date that the client last logged in to their account
30) *Create Date* – Do not fill this column out. This is a computer generated column that will provide the date that the account was created
31) *Updated Date* – Do not fill this column out. This is a computer generated column that will provide the date that the client last updated their account
32) *Customer Group ID* – Enter the numeric customer group ID number that is associated with this customer. If you have yet to create your customer groups, do so now by going to Customers > Customer Groups > New.



33) *Fax* – Enter the customers fax number here
34) *Website* – Enter the customers website here
35) *Reg Number* – Enter the registration number for your client here (US customers)