

RSSS Rental Agreement Training Guide with Timestamps

A complete step-by-step walkthrough of the RSSS 11.5 video, with time references for screenshots.

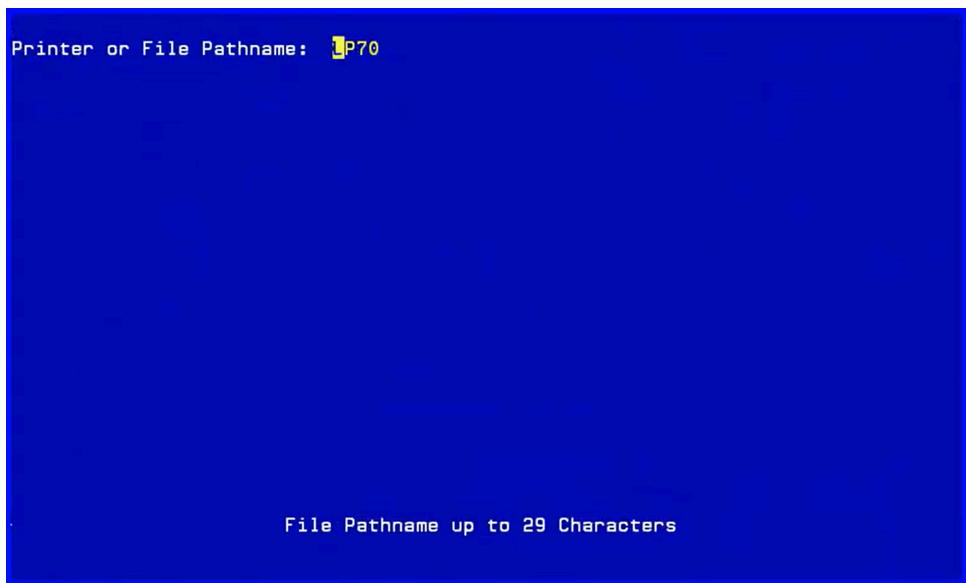
1. Introduction to the Process (00:00–00:36)

Overview of the process. You must always look up or add a customer before handling agreements or other customer-related tasks.



2. Start a New Rental Agreement (00:36–00:58)

Select option 2 for a new agreement. Press Enter through the printer selection.



3. Customer Lookup (00:58–01:25)

Lookup by: Name (Last, First), Address, Phone, SSN, DL#, Account#. Use function keys: F1 Address, F2 DL#, F3 SSN, F4 Account, F6 Phone

Customer Maintenance 09/06/06

Customer Name/#: _____

F1-Address F2-Drvrs Lic F3-SSAN F4-Acct Nbr F5-Help F6-Find by Phone#

4. Add a New Customer (01:25–02:07)

If not found, press F6 to add new. Enter name details, company vs. individual.

Customer Maintenance 09/06/06

Customer Name/#: HICKS RON

Loc	Acct Nbr	Last Name	First Name	Address	DL# Or City	SSAN
*	1 10010621	HICKS	ROSHANDA	1011 N. 22ST	ANYTOWN	0001
	10005644	HICKS	SHARON,JAC	3870 S HEADER CA	ANYTOWN	0001
	10002980	HIDALGO/CUA	CAROLINA/C	2991 SE DURANT A	ANYTOWN	0001
	10006130	HIELD	CHIQUETA	1027 LINCOLN ST	ANYTOWN	0001
	1002521	HIGGINBOTH	RUTH CLARK	3313 S US1 LOT7	ANYTOWN	0001
	10001043	HIGGINS	CINDY	8350 47TH AVE	ANYTOWN	0001
	10000392	HIGGINS	DEBBIE	4648 NW 11TH DRI	ANYTOWN	0001
	10002956	HIGGINS	KELLY	1956 18TH AVE	ANYTOWN	0001
	4002632	HIGGINS	MARY	5340 SE DELL ST	ANYTOWN	0001
	10004610	HIGGINS	STANLEY &	5015 FAIRWAYS CI	ANYTOWN	0001
	10002184	HIGGINS	THOMAS	3041 SW GRAPEVIN	ANYTOWN	0001
	10000583	HIGGS	NINA	2605 ESSEX DR.	ANYTOWN	0001
	10001290	HIGH	GEORGE/IRE	PALM GARDENS RM	ANYTOWN	0001
	2002833	HIGHBERG	ANN	2064 NW 4TH ST	ANYTOWN	0001
	10000216	HIGHTOWER	JOI	522 N 14TH ST	ANYTOWN	0001

F1-Next Page F2-Prev Page F3-AR/RTO Hist F4-Chg F5-Delete F6-Add

5. Enter Address and Location (02:07–03:37)

Enter street address, apartment number, and ZIP. ZIP autofills city/state. For Canada, use Map Code or Postal Code fields. Press Enter After Each Field

6. Phone and ID Details (03:37–05:21)

Add home, work, cell phone, fax, birthdate, SSN, and driver's license. Press Enter after each field.

Customer Add			09/06/06
Customer/Or: HICKS	, RON	Acct#:	10012228
Company Name:			
Contact Name:			
Address:	1235 ABC BLVD		
Address Line 2:	APT 203		
Zip/City/State:	11111-0000 CORPUS CHRISTI TX	Map Code:	
Home Phone Nbr:	(361)333-5656	Work Phone Nbr:	(361)333-5757
Cell Phone Nbr:	(361)333-5858	Pager Phone Nbr:	3
Fax Phone Nbr:		Birth Date:	
SSAN:		Drivers License Nbr:	
Taxable?: Y	Tax Codes	Bill To Number:	
Tax Number:			
Charge Cust:	N	Retail Discount Level:	
Credit Limit:	0	Default Retail Pmt Form:	
Status Flag:	Default: Salesperson/Acct Mgr:		
Customer Type:		RTO Recv:	
Email Address:			
Bank/CC Info:		00/00	
Default PO Nbr:		Best Time to Call:	
<hr/>			
F1-References	F2-Employer	F3-Landlord	F4-2nd Cust
F7-Car Info			

7. Tax Settings (05:21–06:26)

Mark if taxable (Y/N). Enter tax code (or accept default with F8). Add Bill To customer if different (must already exist). Tax Codes Should Be in the Directory

Customer Add			09/06/06
Customer/Or: HICKS	, RON	Acct#:	10012228
Company Name:			
Contact Name:			
Address:	1235 ABC BLVD		
Address Line 2:	APT 203		
Zip/City/State:	11111-0000 CORPUS CHRISTI TX	Map Code:	
Home Phone Nbr:	(361)333-5656	Work Phone Nbr:	(361)333-5757
Cell Phone Nbr:	(361)333-5858	Pager Phone Nbr:	(361)333-5959
Fax Phone Nbr:	(361)333-6060	Birth Date:	1/01/1967
SSAN:	888-02-2121	Drivers License Nbr:	55552224444
Taxable?: Y	Tax Codes	Bill To Number:	
 <div style="border: 1px solid black; padding: 5px; width: 100%;">Tax Codes: <input type="text"/></div> 			
Default PO Nbr:		Best Time to Call:	
Enter a tax code name(Partial name lists selections)			
F1-References	F2-Employer	F3-Landlord	F4-2nd Cust
F7-Car Info			

8. Retail Options (06:43–08:08)

Charge option (Y/N). Retail discount: C, D, A, 0, or leave blank. Set discount % if required.

Customer Add			09/06/06		
Customer/Or: HICKS	, RON	Acct#: 10012228			
Company Name:					
Contact Name:					
Address: 1235 ABC BLVD					
Address Line 2: APT 203					
Zip/City/State: 11111-0000 CORPUS CHRISTI TX	Map Code:				
Home Phone Nbr: (361)333-5656	Work Phone Nbr: (361)333-5757				
Cell Phone Nbr: (361)333-5858	Pager Phone Nbr: (361)333-5959				
Fax Phone Nbr: (361)333-6060	Birth Date: 1/01/1967				
SSAN: 888-02-2121	Drivers License Nbr: 55552224444				
Taxable?: Y	Tax Codes	Bill To Number:			
Tax Number:					
Charge Cust: N	Retail Discount Level:				
Credit Limit: 0	Default Retail Pmt Form:				
Status Flag: Default	Salesperson/Act. Mgr:				
Customer Type:	RTO Recv:				
Email Address:					
Bank/CC Info:	00/00				
Default PO Nbr:	Best Time to Call:				
SALE price level(blank for regular price);(C)ash only,(D)iscount, m(0)p, m(A)p					
F1-References		F2-Employer	F3-Landlord	F4-2nd Cust	F7-Car Info

9. Credit and Payment Preferences (08:08–10:20)

Set credit limit, default payment form, status flag, salesperson and account manager numbers. Select customer type (R for Rental).

Customer Add			09/06/06
Customer/Or: HICKS	, RON	Acct#: 10012228	
Company Name:			
Contact Name:			
Address: 1235 ABC BLVD			
Address Line 2: APT 203			
Zip/City/State: 11111-0000 C			
Home Phone Nbr: (361)333-565			
Cell Phone Nbr: (361)333-585			
Fax Phone Nbr: (361)333-606			
SSAN: 888-02-2121			
Taxable?: Y	Tax		
Tax Number:			
Charge Cust: N			
Credit Limit: 0			
Status Flag: Default			
Customer Type:			
Email Address:			
Bank/CC Info:			
Default PO Nbr:	Default customer type	sets that are added	
F10-Exit		ENTER-Select	

- RENTAL
- COMMERCIAL ACCT
- X IN HOUSE
- A AIRTIME ONLY PGR
- E EMPLOYEE RENTAL
- C CASH CUSTOMER
- Y LAYAWAY
- H PERSONAL ACCOUNT
- S SPECIAL ORDER

10. RTO and Credit Card Info (10:20-11:43)

RTO Receivable auto shows during payment. Enter credit card info (if applicable). Add PO number and best time to call.

Customer Add		09/06/06		
Customer/Or: HICKS	, RON	Acct#: 10012228		
Company Name:				
Contact Name:				
Address: 1235 ABC BLVD				
Address Line 2: APT 203				
Zip/City/State: 11111-0000 CORPUS CHRISTI TX	Map Code:			
Home Phone Nbr: (361)333-5656	Work Phone Nbr: (361)333-5757			
Cell Phone Nbr: (361)333-5858	Pager Phone Nbr: (361)333-5959			
Fax Phone Nbr: (361)333-6060	Birth Date: 1/01/1967			
SSAN: 888-02-2121	Drivers License Nbr: 55552224444			
Taxable?: Y	Tax Codes	Bill To Number:		
Tax Number:				
Charge Cust: N	Retail Discount Level:			
Credit Limit: 0	Default Retail Pmt Form:			
Status Flag:	Default: Salesperson/Acct Mgr:			
Customer Type: R	RTO Recv:			
Email Address:				
Bank/CC Info:	00/00			
Default PO Nbr:	Best Time to Call:			
(VS)=Visa (MC)=Mastercard (DI)=Discover (AM)=AmEx (OT)=Other (BD)=Bank Draft				
<hr/>				
F1-References	F2-Employer	F3-Landlord	F4-2nd Cust	F7-Car Info

Customer Add		09/06/06		
Customer/Or: HICKS	, RON	Acct#: 10012228		
Company Name:				
Contact Name:				
Address: 1235 ABC BLVD				
Address Line 2: APT 203				
Zip/City/State: 11111-0000 CORPUS CHRISTI TX	Map Code:			
Home Phone Nbr: (361)333-5656	Work Phone Nbr: (361)333-5757			
Cell Phone Nbr: (361)333-5858	Pager Phone Nbr: (361)333-5959			
Fax Phone Nbr: (361)333-6060	Birth Date: 1/01/1967			
SSAN: 888-02-2121	Drivers License Nbr: 55552224444			
Taxable?: Y	Tax Codes	Bill To Number:		
Tax Number:				
Charge Cust: N	Retail Discount Level:			
Credit Limit: 0	Default Retail Pmt Form:			
Status Flag:	Default: Salesperson/Acct Mgr:			
Customer Type: R	RTO Recv:			
Email Address:				
Bank/CC Info:	00/00			
Default PO Nbr:	Best Time to Call: AFTER 5			
Enter best time to call customer				
<hr/>				
F1-References	F2-Employer	F3-Landlord	F4-2nd Cust	F7-Car Info

11. Add More Customer Info (12:07–15:36)

Use function keys: F1 (References), F2 (Employer), F3 (Landlord), F4 (Second Customer), F7 (Car Info). Press F9 to return.

Customer/Or: HICKS
Company Name:
Contact Name:
Address: 1235 ABC BLV
Address Line 2: APT 203
Zip/City/State: 11111-0000 C
Home Phone Nbr: (361)333-565
Cell Phone Nbr: (361)333-585
Fax Phone Nbr: (361)333-606
SSAN: 888-02-2121
Taxable?: Y Tax
Tax Number:
Charge Cust: N
Credit Limit: 0
Status Flag: Default
Customer Type: R
Email Address:
Bank/CC Info:
Default PO Nbr:
Last name for this reference

Name: ,
Add:
Add2:
City: CORPUS CHRISTI TX 11111-
Ph: Map Code:
Rel:
Name: ,
Add:
Add2:
City: CORPUS CHRISTI TX 11111-
Ph: Map Code:
Rel:
Name: ,
Add:
Add2:
City: CORPUS CHRISTI TX 11111-
Ph: Map Code:
Rel:

F8-Backout F9-Second Page F10-Exit ENTER-Next Field

Customer Add 09/06/06
Customer/Or: HICKS , RON Acct#: 10012228
Company Name:
Contact Name:
Address: 1235 ABC BLV
Address Line 2: APT 203
Zip/City/State: 11111-0000 C
Home Phone Nbr: (361)333-565
Cell Phone Nbr: (361)333-585
Fax Phone Nbr: (361)333-606
SSAN: 888-02-2121
Taxable?: Y Tax
Tax Number:
Charge Cust: N
Credit Limit: 0 DL
Status Flag: Default: Salesperson/Acct Mgr: RTO Recv:
Customer Type: R
Email Address:
Bank/CC Info:
00/00
Default PO Nbr: Best Time to Call: AFTER 5
Employer's name

Name: ,
Add:
Add2:
City: CORPUS CHRISTI TX 11111-
Ph: Map Code:
Comment:
PayDays:

F8-Backout F9-Update Record F10-Exit ENTER-Next Field

Customer Add 09/06/06
Customer/Or: HICKS , RON Acct#: 10012228
Company Name:
Contact Name:
Address: 1235 ABC
Address Line 2: APT 203
Zip/City/State: 11111-0000
Home Phone Nbr: (361)333-
Cell Phone Nbr: (361)333-
Fax Phone Nbr: (361)333-
SSAN: 888-02-21
Taxable?: Y Tax
Tax Number:
Charge Cust: N
Credit Limit: 0
Status Flag: Default
Customer Type: R
Email Address:
Bank/CC Info:
Default PO Nbr: 00/00
Name of the apartments or the property management company

Apt:
Mgr:
Name: Or Landlord's Name
Add:
Add2:
City: CORPUS CHRISTI TX 11111-
Ph: Map Code:

F8-Backout F9-Update Record F10-Exit ENTER-Next Field

Customer Add 09/06/06
Customer/Or: HICKS , RON Acct#: 10012228
Company Name:
Contact Name:
Address: 1235 ABC BLV
Address Line 2: APT 203
Zip/City/State: 11111-0000 C
Home Phone Nbr: (361)333-565
Cell Phone Nbr: (361)333-585
Fax Phone Nbr: (361)333-606
SSAN: 888-02-2121
Taxable?: Y Tax
W Ph:
Name: ,
Add:
Add2:
City: CORPUS CHRISTI TX 11111-
Ph: Map Code:
DL#:
Rel:
BDte:
Customer Type: R
Email Address:
Bank/CC Info:
00/00
Default PO Nbr: Best Time to Call: AFTER 5
Last name for this customer

F8-Backout F9-Update Record F10-Exit ENTER-Next Field

Customer Add 09/06/06
Customer/Or: HICKS , RON Acct#: 10012228
Company Name:
Contact Name:
Address: 1235 ABC BLV
Address Line 2: APT 203
Zip/City/State: 11111-0000 C
Home Phone Nbr: (361)333-565
Cell Phone Nbr: (361)333-585
Fax Phone Nbr: (361)333-606
SSAN: 888-02-2121
Taxable?: Y Tax
Tax Number:
Charge Cust: N
Credit Limit: 0
Status Flag: Default
Customer Type: R
Email Address:
Bank/CC Info:
Default PO Nbr: 00/00
Best Time to Call: AFTER 5
License Plate Number

License:
VIN Nbr:
Year: 0
Make:
Model:
Color:
Lien:
Phone #:

F8-Backout F9-Second Page F10-Exit ENTER-Next Field

12. Finish Adding Customer (15:36–16:08)

At 'Any More Changes' prompt: enter Y to edit or press Enter to accept and finish. The F9 Key is the End Key to finish the task once you are at the bottom of the page

New Agreement Add 09/06/06

Customer Name: HICKS , RON Acct#: 10012228

Salesmen Nbrs: Agreemnt Nbr:

EMPLOYEE	0001	1
EMPLOYEE	0002	2
EMPLOYEE	0003	3
EMPLOYEE	0004	4
EMPLOYEE	0005	5
EMPLOYEE	0006	6
EMPLOYEE	0007	7
EMPLOYEE	0008	8
EMPLOYEE	0009	9
EMPLOYEE	0010	10
EMPLOYEE	0011	11
EMPLOYEE	0012	12
EMPLOYEE	0013	13

Acct Mgr Nbr: 1
Store Nbr: 1
Source:
Agreemnt Type:
Tax Code:
Ticket Type: 0
Serial Nbr Pmt Amt Spiff ESP

Enter the salesman who sold this agreement; enter to list

F1-Forward F2-Back F10-Exit ENTER-Select

13. Start Agreement Details (16:24–17:50)

Enter salesperson number, agreement number, account manager or route, agreement date, and store number. 14. Advertising and Type (17:50–19:33) This is Important and Needs to Be filled out!!

New Agreement Add 09/06/06

Customer Name: HICKS , RON Acct#: 10012228

Salesmen Nbrs: 2 Agreemnt Nbr:
Acct Mgr Nbr: 2 Agreemnt Date: 9/06/06
Store Nbr: 1 Delivery Date: 9/07/06
Source: Cust Type: R
Agreemnt Type: Pmt Terms:
Tax Code: Ticket Nbr:
Ticket Type: 0 # BOR Items:
Serial Nbr Pmt Amt Spiff ESP Amt Serial Nbr Pmt Amt Spiff ESP Amt

Enter up to 3 advertising sources that brought this customer in; enter to list

F5-Help F8-Backout F10-Exit

Choose source(s) of lead (up to 3), customer type auto-fills from earlier.

New Agreement Add 09/06/06

Customer Name: HICKS , RON Acct#: 10012228

Salesmen Nbrs: 2 Agreemnt Nbr: TV TELEVISION
 Acct Mgr Nbr: 2 Agreemnt Date: RA RADIO
 Store Nbr: 1 Delivery Date: CC CURRENT CUST
 Source: Cust Type: RE REFERRAL
 Agreemnt Type: Pmt Terms: NP NEWSPAPER
 Tax Code: Ticket Nbr: YP YELLOW PAGES
 Ticket Type: 0 # BOR Items: DH DOOR HANGERS
 Serial Nbr Pmt Amt Spiff ESP Amt Serial Nbr
 FL FLYERS
 DM DIRECT MAIL
 WM WORD OF MOUTH
 DB DRIVE/WALK BY
 AV ADVO
 PC PREV. CUSTOMER

Enter up to 3 advertising sources that brought this cu

F1-Forward F2-Back F10-Exit ENTER-Select

New Agreement Add 09/06/06

Customer Name: HICKS , RON Acct#: 10012228

Sale R RENTAL
 Acc C COMMERCIAL ACCT
 X IN HOUSE
 A AIRTIME ONLY PGR
 Agree E EMPLOYEE RENTAL
 C CASH CUSTOMER
 Ti Y LAYAWAY
 S H PERSONAL ACCOUNT
 S SPECIAL ORDER

Agreemnt Nbr: 9/06/06
 Agreemnt Date: 9/07/06
 Delivery Date: Cust Type:
 Pmt Terms:
 Ticket Nbr:
 # BOR Items:
 ESP Amt Serial Nbr Pmt Amt Spiff ESP Amt

customer type; enter to list

F10-Exit ENTER-Select

15. Agreement Type and Frequency (19:33–21:17)

Choose agreement type (A, M, X, Z) and payment frequency. Types determine installment count.

New Agreement Add				09/06/06
Customer Name: HICKS , RON		Acct#: 10012228		
Salesmen Nbrs:	2	Agreement Nbr:	78 WEEKS	W 78
Acct Mgr Nbr:	2	Agreement Date:	B 18 MONTHS	M 18
Store Nbr:	1	Delivery Date:	C 52 WEEKS	W 52
Source:	NP TV RA	Cust Type:	D 12 MONTHS	M 12
Agreement Type:		Pmt Terms:	E 104 WEEKS	W 104
Tax Code:		Ticket Nbr:	F 24 MONTHS	M 24
Ticket Type:	0	# BOR Items:	G 91 WEEKS	W 91
Serial Nbr	Pmt Amt	Spiff	ESP Amt	Serial Nbr Pmt Amt Spiff ESP Amt

Enter the contract type; en

F10-Exit ENTER-Select

16. Ticket Info and BOR (21:17–23:11)

Tax code (if unique), ticket number (auto), ticket type (O/S/F), and balance-on-rent item count (1 or more). O is rent o own S is not in stock and will be delivered later

New Agreement Add				09/06/06
Customer Name: HICKS , RON		Acct#: 10012228		
Salesmen Nbrs:	2	Agreement Nbr:		
Acct Mgr Nbr:	2	Agreement Date:	9/06/06	
Store Nbr:	1	Delivery Date:	9/07/06	
Source:	NP TV RA	Cust Type:	R	
Agreement Type:	A	Pmt Terms:	W	
Tax Code:		Ticket Nbr:		
Ticket Type:	0	# BOR Items:		
Serial Nbr	Pmt Amt	Spiff	ESP Amt	Serial Nbr Pmt Amt Spiff ESP Amt

Enter a tax code if this agreement will be taxed DIFFERENTLY than normal

F5-Help F8-Backout F10-Exit

17. Add Inventory to Agreement (24:08–27:52)

Choose in-stock or not. Lookup by F1 (inventory), F2 (model), or F3 (model number list). Confirm cash price. The system can handle 14 items on a rental agreement.

New Agreement Add 09/06/06

Customer Name: HICKS , RON Acct#: 10012228

Salesmen Nbrs: 2 Agreemnt Nbr: 9/06/06
 Acct Mgr Nbr: 2 Agreemnt Date: 9/07/06
 Store Nbr: 1 Delivery Date: 9/07/06
 Source: NP TV RA Cust Type: R
 Agreemnt Type: A Pmt Terms: W
 Tax Code: Ticket Nbr: 10040832
 Ticket Type: 0 # BOR Items: 1
 Serial Nbr Pmt Amt Spiff ESP Amt Serial Nbr Pmt Amt Spiff ESP Amt

Enter a serial number or one of the function key options listed below

F1-List Inventory F2-Get By Model # F5-Help F8-Backout

Inventory Inquire 09/06/06

Start Key: Select: Loc & Stat: Desc:
 Color: Fab/Mat: Primary Color: Primary Fab/Mat:

Enter the information to search for (wildcard is available for model numbers)

Start By: F3-Model Num F4-Bar Code Num F6-Serial Num

Inventory Inquire 09/06/06

Start Key: Select: Loc & Stat: 1 I Desc: BEDROOM
 Color: Fab/Mat: Primary Color: Primary Fab/Mat:

Enter the description to search for (partial entry is allowed)

Start By: F3-Model Num F4-Bar Code Num F6-Serial Num

Inventory Inquire 09/06/06

Start Key: Select: Loc & Stat: 1 I Desc: BEDROOM
 Color: Fab/Mat: Primary Color: Primary Fab/Mat:
 Model Number Serial Nbr Description Color Fab/Mat Loc S

FBSEM2400	49973	BEDROOM		1 N
FBSEM3600	49965	BEDROOM SET		1 N
FBSEM4100	50103	BEDROOM		1 N
FBSEM4100	50104	BEDROOM		1 N
FBSEM4100	50105	BEDROOM		1 N
FBSEM4100	50118	BEDROOM		1 N
FBSEM4100	50119	BEDROOM		1 N
FBSEM4100	50120	BEDROOM		1 N
FBSEM4100	50121	BEDROOM		1 N
FBSEM4100	50122	BEDROOM		1 N
FBSEM5400	49852	BEDROOM SET		1 N
FBSEM6600	50106	BEDROOM		1 N
FBSEM6600	50107	BEDROOM		1 N
FBSEM6600	50108	BEDROOM		1 N

Second Description: 5PC CHERRY GROUP

F1-Next Page F2-1st Page F8-Prev Menu CMD-Exit

18. Finalize Items and Club Program (27:52–28:58)

Press F9 to finish. Accept or decline club program. If no club, set to N and zero club payment.

New Agreement Add 09/06/06

Customer Name: HICKS , RON Acct#: 10012228

Salesmen Nbrs: 2 Agreemnt Nbr: 9/06/06
 Acct Mgr Nbr: 2 Agreemnt Date: 9/06/06
 Store Nbr: 1 Delivery Date: 9/06/06
 Source: NP TV RA Cust Type: R
 Agreemnt Type: A Pmt Terms: W
 Tax Code: Ticket Nbr: 10040832
 Ticket Type: 0 # BOR Items: 1
 Serial Nbr Pmt Amt Spiff ESP Amt Serial Nbr Pmt Amt Spiff ESP Amt
 49973 36.00

Add Club Ticket: Regular Club Payment: 2.99 Any Changes:

F3-Calc Amt/Date F4-Calc Date/Amt F5-Help F8-Backout F10-Exit

19. Money Screen Overview (28:58–30:29)

Review ESP, tax rate, due date. All totals populate from items added.

New Agreement Add				09/06/06
Customer Name: HICKS	, RON	Acct#: 10012228		
Rate Of Pmt: 36.00	Rate Of Grp: 5.40	Rate Of ESP: 0.00		
Rate Of Tax: 2.97	Ttl Reg Due: 44.37	Next Pmt Due: 9/13/06		
Agreement Amt: 2,808.00	Agreement Bal: 2,808.00	Balloon Pmt: 5.40		
Delivery Amt: 36.00	1st Pmt Amt: 36.00	GRP/ESP Amt: 5.40		
Deposit Amt: 0.00	Proc Fee: 5.00	Tax Amt: 2.97		
Total Due: 49.37	Pmt 1: 1/ 36.00	Pmt 2: / 5.00		
Pmt Terms: W 78 Wks	Amt Received: 0.00	Change Due: 0.00		
Serial Nbr 49973	Pmt Amt 36.00	Spiff 0.00	ESP Amt 0.00	

Amount of payment (only) expected on all future payments

F3-Calc Amt/Date F4-Calc Date/Amt F5-Help F8-Backout F10-Exit

20. Collect Payment (30:29–34:16)

Enter payment amount(s), prorated amount, GRP, deposits, and processing fee. Use C (Change) or R (Receivable Credit).

New Agreement Add				09/06/06
Customer Name: HICKS	, RON	Acct#: 10012228		
Rate Of Pmt: 36.00	Rate Of Grp: 5.40	Rate Of ESP: 0.00		
Rate Of Tax: 2.97	Ttl Reg Due: 44.37	Next Pmt Due: 9/13/06		
Agreement Amt: 2,808.00	Agreement Bal: 2,808.00	Balloon Pmt: 5.40		
Delivery Amt: 36.00	1st Pmt Amt: 36.00	GRP/ESP Amt: 5.40		
Deposit Amt: 0.00	Proc Fee: 5.00	Tax Amt: 2.97		
Total Due: 49.37	Pmt 1: 1/ 36.00	Pmt 2: / 5.00		
Pmt Terms: W 78 Wks	Amt Received: 0.00	Change Due: 0.00		
Serial Nbr 49973	Pmt Amt 36.00	Spiff 0.00	ESP Amt 0.00	

Amt Greater Than Amt Due; Enter "C" to Calc Change or "R" to Credit Receivables

F3-Calc Amt/Date F4-Calc Date/Amt F5-Help F8-Backout F10-Exit

New Agreement Add				09/06/06
Customer Name: HICKS	, RON	Acct#: 10012228		
Rate Of Pmt: 36.00	Rate Of Grp: 5.40	Rate Of ESP: 0.00		
Rate Of Tax: 2.97	Ttl Reg Due: 44.37	Next Pmt Due: 9/13/06		
Agreement Amt: 2,808.00	Agreement Bal: 2,808.00	Balloon Pmt: 5.40		
Delivery Amt: 36.00	1st Pmt Amt: 36.00	GRP/ESP Amt: 5.40		
Deposit Amt: 0.00	Proc Fee: 5.00	Tax Amt: 2.97		
Total Due: 49.37	Pmt 1: / 49.37	Pmt 2: / 0.00		
Pmt Terms: W 78 Wks	Amt Received: 0.00	Change Due: 0.00		
Serial Nbr 49973	Pmt Amt 36.00	Spiff 0.00	ESP Amt 0.00	

Method of paying (ENTER)

CASH 001
CHECKS 002
MONEY ORDERS 003
CHARGE CARDS 004
NON CASH REFUND 005
CASH REFUND 006
FREE PAYMENT 008
MIXED (CASH & CHECK) 009
FIELD CASH 010

F1-Forward F2-Back F10-Exit ENTER-Select

21. Confirm Pricing & Notes (34:16–37:44)

Verify prices, enter delivery notes (20 chars x 3 lines). Notes appear on printed delivery ticket.

New Agreement Add				09/06/06			
Customer Name: HICKS	, RON	Acct#:	10012228				
Rate Of Pmt:	36.00	Rate Of Grp:	5.40	Rate Of ESP:	0.00		
Rate Of Tax:	2.97	Ttl Reg Due:	44.37	Next Pmt Due:	9/13/06		
Agreement Amt:	2,808.00	Agreement Bal:	2,808.00	Balloon Pmt:			
Delivery Amt:		1st Pmt Amt:	36.00	GRP/ESP Amt:	5.40		
Deposit Amt:		Proc Fee:	5.00	Tax Amt:	2.97		
Total Due:	49.37	Pmt 1:	1/ 50.00	Pmt 2:	/		
Pmt Terms:	W 78 Wks	Amt Received:	50.00	Change Due:	0.63		
Serial Nbr	Pmt Amt	Spiff	ESP Amt	Serial Nbr	Pmt Amt	Spiff	ESP Amt
49973	36.00						

Del Notes:

Delivery Notes Line 1

22. Printing Docs (38:00–38:38)

Print receipt and agreement. Align forms if using pre-printed templates.

New Agreement Add				09/06/06			
Customer Name: HICKS	, RON	Acct#:	10012228				
Rate Of Pmt:	36.00	Rate Of Grp:	5.40	Rate Of ESP: 0.00			
Rate Of Tax:	2.97	Ttl Reg Due:	44.37	Next Pmt Due: 9/13/06			
Agreement Amt:	2,808.00	Agreement Bal:	2,808.00	Balloon Pmt:			
Delivery Amt:		1st Pmt Amt:	36.00	GRP/ESP Amt: 5.40			
Deposit Amt:		Proc Fee:	5.00	Tax Amt: 2.97			
Total Due:	49.37	Pmt 1:	1/ 50.00	Pmt 2: /			
Pmt Terms:	W 78 Wks	Amt Received:	50.00	Change Due: 0.63			
Serial Nbr	Pmt Amt	Spiff	ESP Amt	Serial Nbr	Pmt Amt	Spiff	ESP Amt
49973	36.00						

Print Agreement: **Y**

23. Post-Agreement Options (38:38–39:11)

Return to Customer Maintenance or press F8 to back out to menu.

24. Lookup Customers by Alternate Methods (39:11–41:41)

Lookup by address, DL#, SSN, account number, or phone number using F1–F6.

Customer Maintenance							09/06/06
Customer Name/#: 407							
Loc	Acct	Nbr	Last Name	First Name	Address	DL# Or City	SSAN
	1002399	REESE	VIVIAN WAR	407 N 2ND APT A	ANYTOWN	0001	
	10008676	HUGHES	ZONA	407 N. 2ND ST. A	ANYTOWN	0001	
	10006813	OLIVER	CHARLOTTE	407 N. 2ND STREET	ANYTOWN	0001	
	10008702	CLAYTON	ANTHONY	407 N. 39TH ST.	ANYTOWN	0001	
	10008928	DUNKIN	LIVING	407 NH 2ND AVE	ANYTOWN	0001	
	1002466	SMITH	JUDY	407 S 14 STREET	ANYTOWN	0001	
*	2002274	MASIAS	RENATE	407 SE 8TH ST	ANYTOWN	0001	
*	4 4001111	MENDOZA	MELISSA	407 SE TEJON ST	ANYTOWN	0001	
	10008251	FORSEE	OSWALD	407 SH 15TH ST	ANYTOWN	0001	
	10004832	DIxon	DONNELL	4079 N. CYPRESS	ANYTOWN	0001	
	10009532	PARRA	JUANITA	4070 SE 441	ANYTOWN	0001	
	5000056	ELLISON	DAVID	4071 46TH ST	ANYTOWN	0001	
	10005251	FERRARA	KEN/LINDA	4071 HAYCROFT ST	ANYTOWN	0001	
	10002570	DUPREY	RICHARD/RO	4071 N US1 #3	ANYTOWN	0001	
	10005655	TROUTMAN	SANDRA	4074 HWY 441 SE	ANYTOWN	0001	
F1-Next Page F2-Prev Page F3-AR/RTO Hist F4-Chg F5-Delete F6-Add							
Customer Maintenance							09/06/06
Customer Name/#: 123							
Loc	Acct	Nbr	Last Name	First Name	Address	DL# Or City	SSAN
*	1 10008422	SMITH	DON	409 SW PARK ST	123123123	0001	
	10012040	SMITH	DONALD	470 33RD AVE	123123124	0001	
	10012222	SMITH	DAVID A.	2222 HOLLYWOOD D	222222222	2222	
*	1 10012221	SMITH	ABEL	3333 HOLLYWOOD D	3333333333	3333	
*	1 10012228	HICKS	RON	1235 ABC BLVD	55552224444	2121	
	10012219	JOE'S POOL HALL		1232 TUTOR LANE	654654654654	4654	
	10012220	SMITH	DOLLY	4444 HOLLYWOOD D	8888888888	8888	
*	1 10012215	AB	AB	XX	99	0099	
*	1 10012227	BAKER	DEBRA	9999 HOLLYWOOD D	99999999999999	9999	
EOF							
F1-Next Page F2-Prev Page F3-AR/RTO Hist F4-Chg F5-Delete F6-Add							

Customer Maintenance							09/06/06
Customer Name/#: 111							
Loc	Acct	Nbr	Last Name	First Name	Address	DL# Or City	SSAN
	10012223	SMITH	ADRIAN	1111 HOLLYWOOD D	1111111111	1111	
*	1 1000801	SMITH	ALICE	7703 JAMES RD	ANYTOWN	1831	
*	4 10012122	SMITH	ALLEN/KATH	2766 SE EVERGREEN	ANYTOWN	1832	
	10012222	SMITH	DAVID A.	2222 HOLLYWOOD D	222222222	2222	
*	1 10012221	SMITH	ABEL	3333 HOLLYWOOD D	3333333333	3333	
	10006743	SMITH	JOHN	1234 AVATAR LANE	ANYTOWN	0002	
*	1 4002805	SMITH	JOHN	3215 SW REGATTA	ANYTOWN	0784	
	10012219	JOE'S POOL HALL		1232 TUTOR LANE	654654654654	4654	
*	1 10012228	HICKS	RON	1235 ABC BLVD	55552224444	2121	
	10012220	SMITH	DOLLY	4444 HOLLYWOOD D	8888888888	8888	
*	1 10012227	BAKER	DEBRA	9999 HOLLYWOOD D	99999999999999	9999	
EOF							
F1-Next Page F2-Prev Page F3-AR/RTO Hist F4-Chg F5-Delete F6-Add							

25. Conclusion (42:02)

Training session ends. Recap of features and tools.