

**Dotting I's, Crossing T's** Tips to keep your system working at top form and speed up your processes, especially in the Calendar and Employees sections.

---

## 1. "Did you Know" Quick Tips

- a. Send out Multiple Contracts from Day at a Glance for a specific truck.
  - i. Filter from the Delivery Tab by Truck or by Trip.
    - 1. Go to Tools and Send out All Reservations.
  - b. Email or Print Multiple Contracts for a Customer from Customer Dashboard.
- i. Filter by Contract Number, Dates, Contract Info, PO Number, Job Number.
  - 1. Go to Reports > Print All Contracts.
- b. Don't forget about Contract Questions in Transaction Configuration.
- i. Reservation, Work Orders, Repairs, Open, Transfers, Subrent, Quotes, Specific Customer, Contracts, Specific Items.
  - b. Quick Quotes from Item Availability.
  - c. Contract Processing.
    - i. Doubleclick Used At\Delivery Address - Opens up dialog box.
    - ii. From the Contract Processing main screen - Tools>Asset Sale or Right Click the Add Item Button.
    - iii. '?' In the Contract Info, Purchase Order or Job ID field in a contract will force the question to be asked the next time the contract is modified; Only if those fields are required in Parameters or in the Customer Record.
    - iv. Initiate Pending Subrental from Contract Processing Screen.
      - b. All the places that you can create Reminders and Tasks -
 

i. Program Menu	viii. Day at a Glance
ii. Accounts Receivable Dashboard	ix. Customer Dashboard
iii. Counter System Main Menu	x. Sales Rep Dashboard
iv. Customer Record	xi. Jobsite Dashboard
v. Customer Call Log	xii. Transaction Dashboard
  - vi. Contract
  - vii. Contract Call Log
    - b. File Maintenance
  - i. Item Special Notes.
    - 1. **<cyour message>** in Item Notes will prompt that message on the screen at close of that item on a contract. Multiple message are allowed. (Message prompt)
    - 2. **<oyour message>** in item notes will prompt that message on the screen at open of that item on a contract. Multiple messages are allowed. (Message prompt)
    - 3. **<ryour question>** in item notes will prompt that message on the screen at close of that item on a repair contract. Multiple questions are allowed. (Closed Repair message)
    - 4. **<qyour question>** in item notes will prompt that question on the screen when that item is added to a contract. Multiple questions are allowed. (Item question)
- ii. Jobsite Special Notes

1. '\*' Placed in the General Notes field of a Job Site or Venue will cause the General Notes to display to the screen anytime the Job Site or Venue is selected for use on a contract. The employee must press the OK button to get through it.

b. System Configuration > Parameters

i. Damage Waiver.

1. Damage Waiver. If you don't charge a Damage Waiver, in Parameters/Display, change Damage Waiver Description to 'No Print'. This will allow the totals to print without any mention of Damage Waiver.
2. Charge Damage Waiver on Non Discounted Amount.

a. Be Cautious - Modifying contracts.

b. Accounting Configuration.

i. Negative Discounts.

ii. Tax Tables.

1. Allocate by Jurisdiction.
2. Display Breakout on Contract.

2. Keyboard Functions

a. Make your keyboard easier to use - This will underline the key letter to enter into the selection box of the Counter System.

i. Go to Control Panel on your POR desktop.

ii. Find Ease of Access.

iii. Find Make the Keyboard easier to use.

iv. Then Make it easier to use Keyboard shortcuts.

b. Windows Keyboard Shortcuts.

i. ALT O for Ok buttons.

ii. ALT C for Cancel buttons.

iii. Tab to move to the next field in an item record.

iv. SHIFT Tab to move back to the previous field in an item record.

v. ALT or CTRL + Print Screen to capture the active window as an image.

b. Counter System Menu and Throughout the Program.

i. Use underline letters to access menu items from the selection box.

1. First seven menu options from New Contract to Clone use the shortcut letter plus:

a. Contract Number

i. N for New Contract then:

- |                        |                   |
|------------------------|-------------------|
| 1. E=Express           | W=Work Order      |
| 2. N=Normal            | P=Internal Repair |
| Order                  |                   |
| 3. R=Reservation       | M=Internal        |
| Maintenance Order      |                   |
| 4. V=Event Reservation | S=Service         |
| 5. A=Asset Sale        | O=Subrental       |
| Contract               |                   |
| 6. Q=Quote             | T=Transfer        |

ii. Letters plus the order number Ex: m729680

1. C=Close + number      R=Reprint/Inquire + number

2. M=Modify + number    V=Void + number
3. S=Send Out + number    L=Clone + number

b.        SAME for last contract, or the Page Up button

ii.Hit your spacebar when you are in the ENTER ID box - This will take you directly to Item Availability.

iii.Hit your Tab key when you are in the ENTER ID box - This will take you directly to Day at a Glance.

iv.Pressing the ESC key several times backs you out of an order.

v.Pressing ESC gets out of of most current windows you may be in.

vi.When you get to the Contract Printing Screen - There are keyboard functions as well:

1. E=Email
2. V=View on Screen
3. I=Select Instruction Printer
4. P=Print
5. N=No Print