

Signed on the Dotted Line (Events) *Take a trip through the system from “You’re hired” to “Thank you!” You’ll see each part of your business a contract entry affects, and how the information is filtered throughout the system to where it needs to be.*

Counter System Tools

We spend all day using the Counter System. It does so many amazing things that are vital to our business. But are we utilizing all of its features? Here are some features which could be used in your operation.

- New Contract- Are you only writing Event Reservations and Normal Contracts? Get to know some other useful contract types:
 - Internal Repair Order- For broken equipment needing repair.
 - Internal Maintenance Order- Items that should be serviced like appliances.
 - Service Calls - Schedule on-site servicing -Tents Installations.
 - Subrental - Contracts to track the equipment you subrent.
 - Transfers - (Multi Store) Move Equipment between stores.

Do you use the CRM and the Task List/ Reminder?

- You can Create Tasks for other users and keep track of them.
- Get notified by others when those tasks are done.
- Set Reminders for you and others that you can sync with your calendar.

Action: Create a reminder to implement the processes you have learned at the conference!

Employee Email/Logs

- Send and Read emails by utilizing the internal email system.
- Log important information about your staff. From reporting an injury to logging what an amazing job a staffer has done. This is the place to do it.

Disbursements

- This is where you can keep track of that \$20 you took out of petty cash for gas.

Missed Rental

- Keep track of what customers are asking for so you can stay up to date with the latest trends.
- Are you priced right for your market -- This can help.

Action: Train your counter staff to record missed rental items. This is a great way to make Informed purchasing decisions!

Dashboards

- Salesman Dashboard - See how and what your sales staff is up to with this handy tool.
- Venue Dashboard -- Easily access those top venues and see where you can improve.
- Transaction Dashboard -- Now you can see revenue and potential revenue.
- Maintenance -- Easy way to see what items need to keep running in tip top shape.