

**The Devil is in the Details** *Do you know the specific ways you can link your records for maximum efficiency? This class will cover the general maintenance and organization of your item records.*

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## **Dynamic Kits / Suggested Items Event/Party**

Packaging items can be a great way to streamline and simplify your contract creation process. It's also a great way to entice customers with a deal. Today we will cover the different ways you can put kits and packages together in Point of Rental. From dynamic quantity kits that are great for tents to other items that are created by a group of component items.

### **Helpful Items**

#### **Examples of Dynamic Packages:**

- a. Chafers to include a lid, frame, water pan, sterno cups.
- b. Dance floors to include sections and trim.
- c. Staging to include sections and maybe legs (Legs could be another auto add item and be able to list all of the leg sizes that you have).
- d. Cocktail Rounds 2 heights to include top, post, base.

Before creating Dynamic Quantity package you should have a parts list of each tent or package you will be creating. Utilize your vendors and see if they can provide you with that information.

- Create Item Records for all your Tent parts (i.e canvas, pipe and fittings.) These are considered component items.
  - Distinguish these items by using two underscores \_\_ in front of the name and marking these items as 'No Print on Contract'.
  - Make sure all of these items have quantities associated with them.
- Create the Dynamic Quantity Item Record for the Actual Tent. (Don't use punctuation or extra spaces as this hinders the lookup process for order entry.)
  - Our recommendation: Create the largest tent that you can install and work your way down from there.
  - You will be able to copy this record and copy the package items. Change the key, name, and the price and the rest is done for you.
  - Access the Dynamic Item - At the lookup screen the key will be pink
    1. Go to 'Tools' > Package Items.
      - a. Choose Qty and enter all of the component items.

### **Suggested Items/ Packages Equipment**

Packaging items can be a great way to streamline and simplify some of your processes. It's also a great way to entice customers with a deal. Today we will cover the different ways you can put kits and packages together in Point of Rental.

**Suggested Items** can help you up sell to customers things that they may not have thought about. Before beginning, pick the item you want to add suggested items to. Make a list of all the items that would be relevant

to that item. Also, decide if you want to add even more incentive to your customers by discounting those items when rented with the original.

- Retrieve the Original item we want to add suggested item to.
  - Go to Tools > Suggested Items
  - Add all of the items and set a discount if applicable.

After entering the quantity for the suggested item, press enter or tab to open up the options drop down. Here are the drop down options:

- **Quantity-** Allows the counter or salesperson to select a suggested item's quantities, while writing the contract.
- **Check No-** When the main item is added to a contract, the suggested items will appear with blank checkboxes. Checking each box will add those items to the contract at the discounted amount. **\*Note:** Hovering your mouse over the check box will display the quantity that will be added to the contract if chosen.
- **Check Yes-** This will look identical to check no, except for the boxes being automatically checked. Clicking OK will automatically add them. Un-checking the boxes or clicking cancel will leave them off the contract.
- **Multi Select-** This is useful when a customer gets a choice of one free attachment for a rental item and any additional attachments would be charged at standard rental rates. Multiselect prevents the user from selecting more than one multi-select item in a suggested items list. For example, a customer may get a free bucket or a free set of forks with a skid steer rental. The user can never select more than one item. **\*Note:** You can build in attachments a second time to allow the user to select additional attachments at standard rental rates.
- **Multi Yes-** Simply pre-selects the most common attachment. While you can set more than one item to Yes, only the last item set to Yes will display as being selected. **\*Important note** – Any item in a suggested items list with an item type of Rental Accessory will be added to the contract at zero cost not matter what the rates are set to.

## Package Items

This option allows you to view or select the Package Items. The Package Items are set up just like the Suggested Items. The only difference between a Package Item and a Suggested Item is that the Package Items are automatically added to the contract in the quantity entered on this screen. The counter person does not have the opportunity to change the quantity until after the item has been added to the contract. You cannot enter an item with a quantity of zero on a Package Item.

**Refer to the Net Help documents - Tent Packages, Suggested Items, Package Items.**