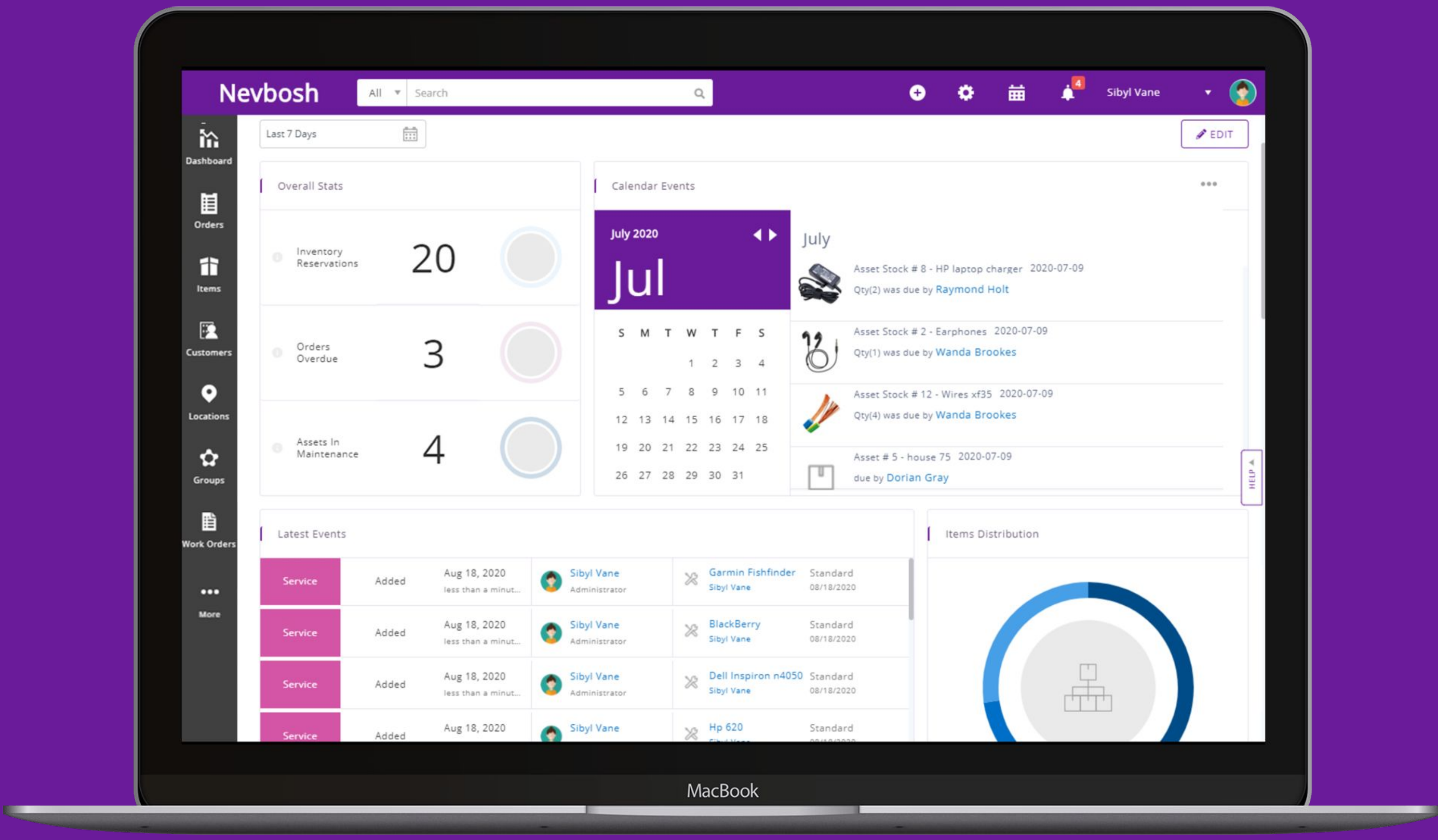


GETTING STARTED WITH

EZRentOut

Rental asset management done right

Blog | Contact us

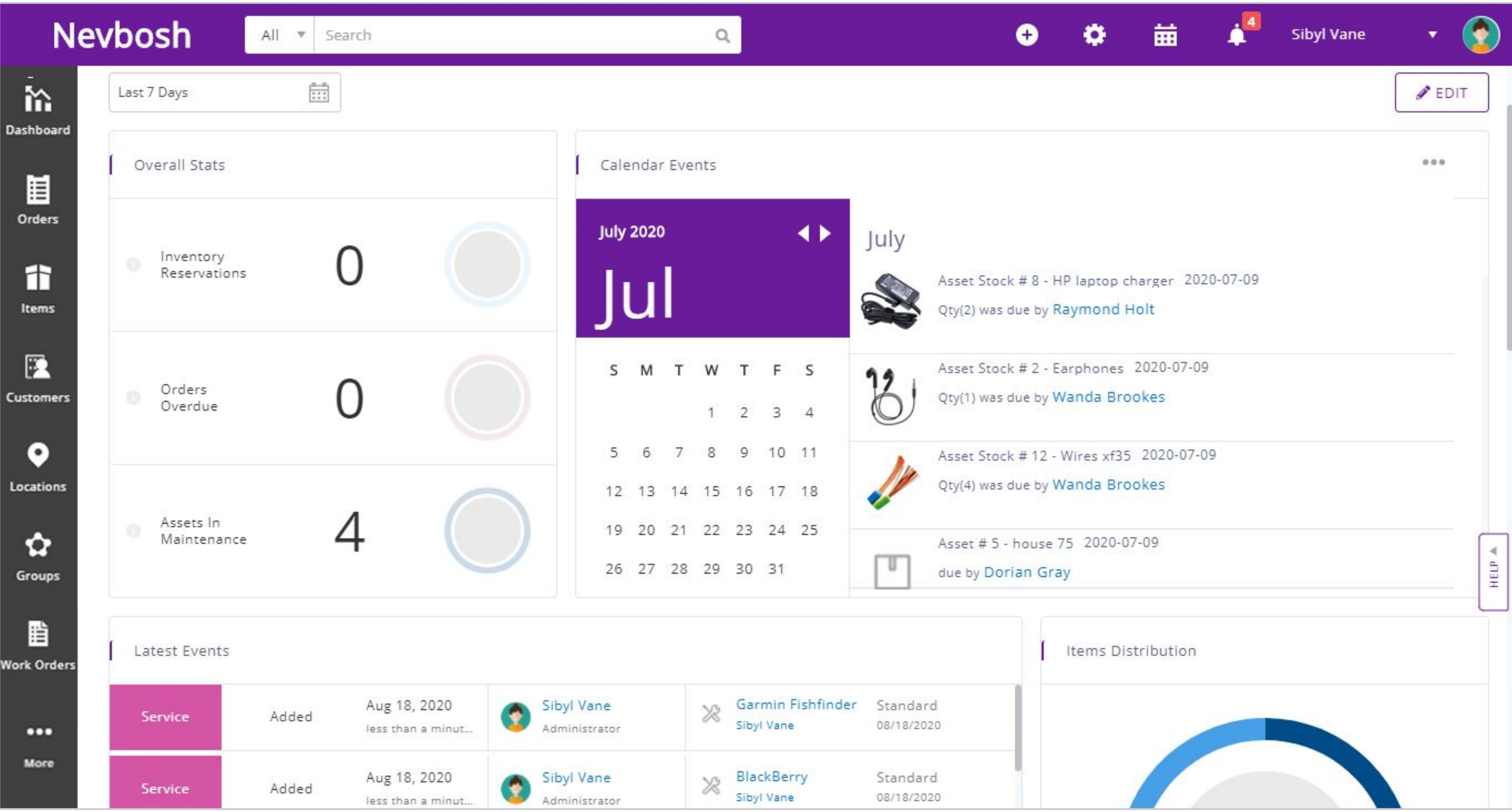
EZ RentOut

Version: 2020

CONTENTS

1 First look

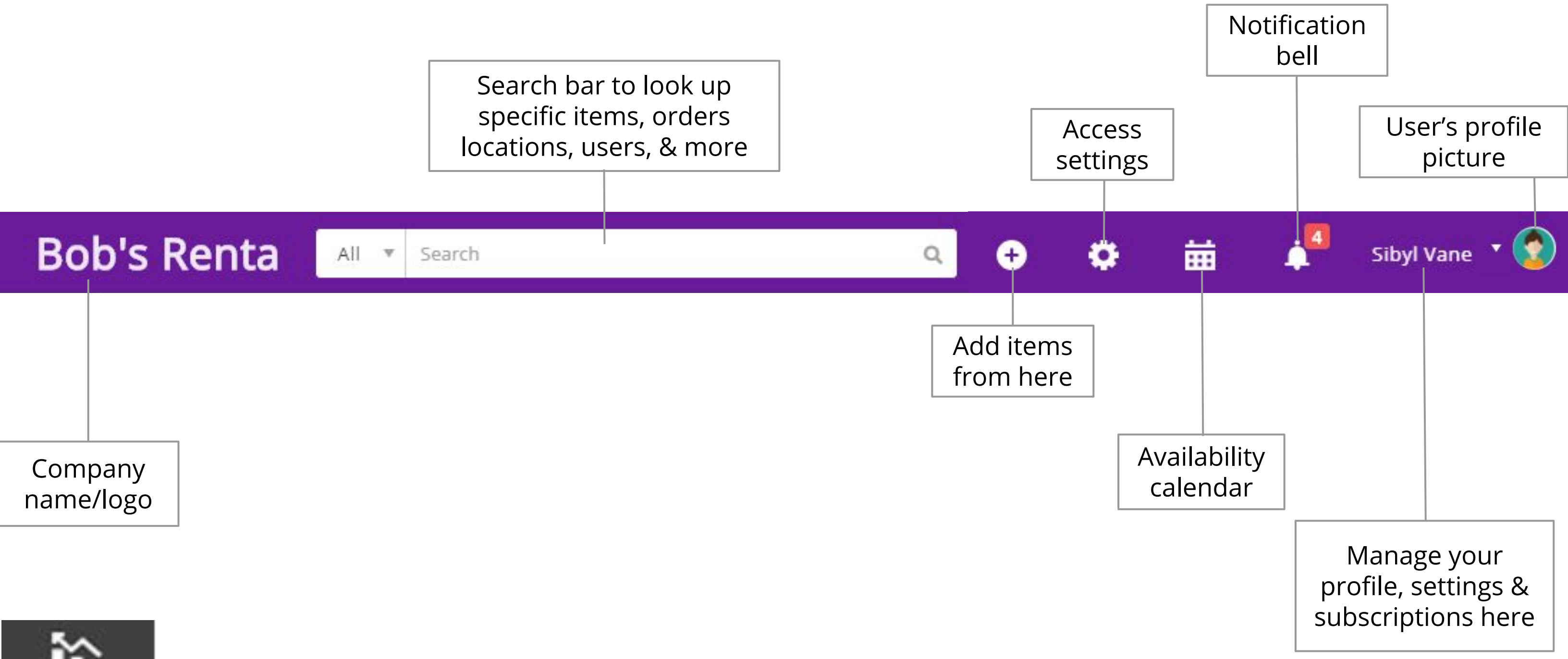
Here’s what you’re going to see when you log into your account:

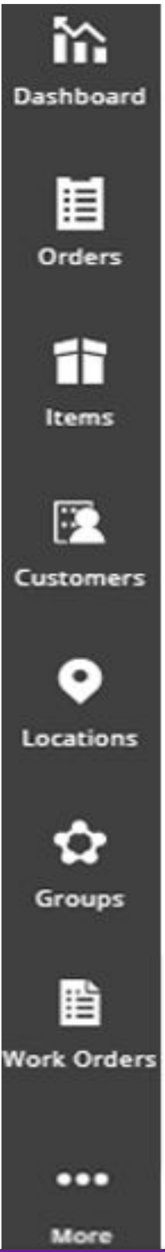


We're going to break this down further into three parts to explain the following individual elements:

1. The top navigation bar
2. The side navigation bar
3. The dashboard

1) TOP NAVIGATION BAR



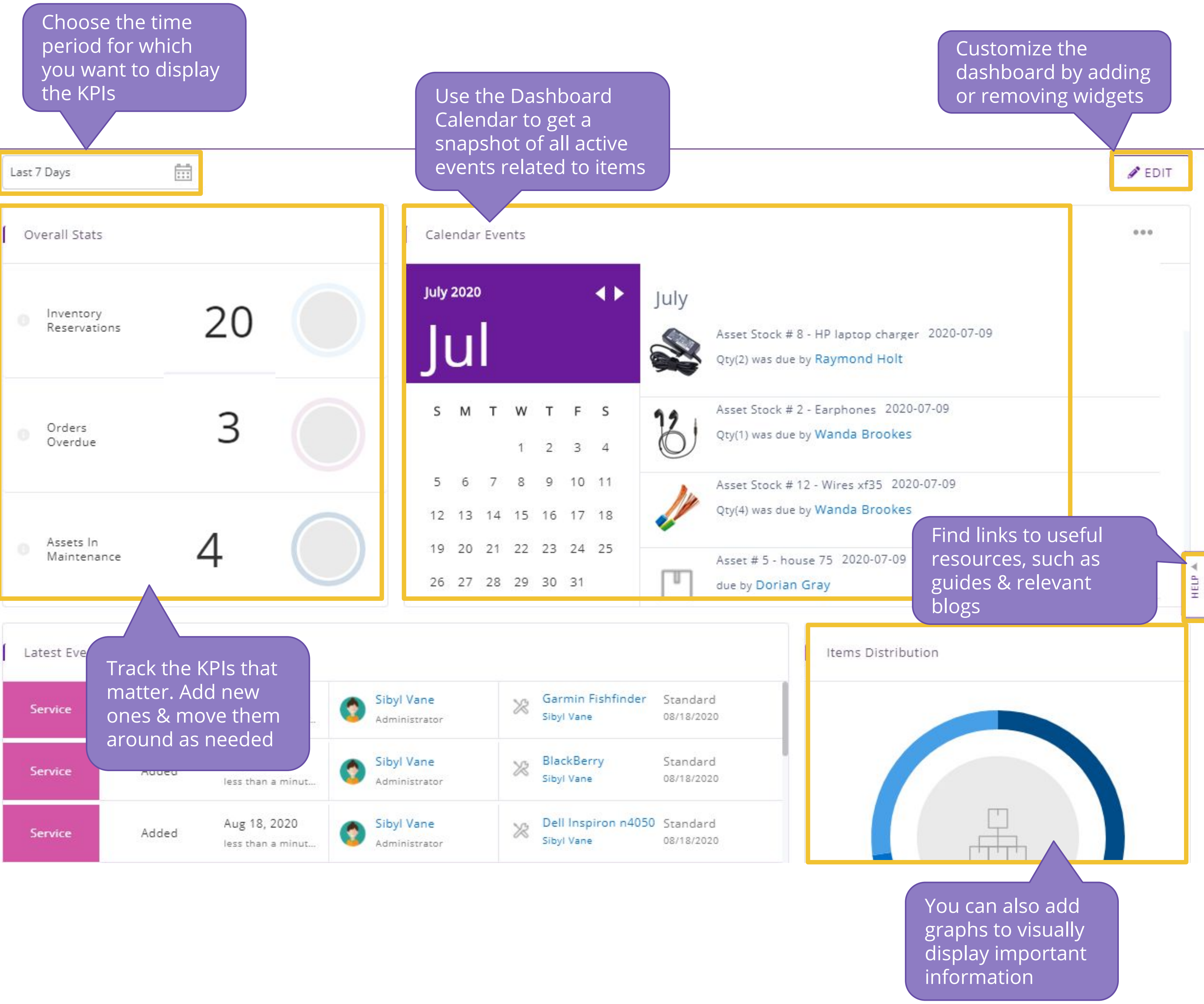


2) SIDE NAVIGATION BAR

A convenient way to navigate to all the major modules. All other modules, such as Purchase Orders, Custom Fields, Bundles, Reports, Alerts, and Vendors, can be found by clicking on ‘More’.

3) THE DASHBOARD

Track ongoing events, upcoming bookings, metric cards, and other key business information - all from one place. Learn more about the Dashboard here.



You can find the entire list of available KPIs once the Dashboard is in 'Edit' mode. You can also view graphs on the Dashboard and track all ongoing and upcoming events, reservations, and maintenance services from the **Dashboard Calendar**.

2 Introduction to Items

2.1. Differentiate between Asset, Asset Stock and Inventory

Identify what type of items you will track. There are three different types in EZRentOut.

ITEMS TO KEEP

ASSETS

Rental items that are tracked individually, e.g. forklift trucks and cars.

If you have 10 similar trucks, add 10 assets for them. Use the clone functionality to do things faster.

Assets are booked or rented out to customers through orders.

ASSET STOCK

Rental items tracked in bulk, e.g. cables or chairs.

If you have 100 chairs, add an Asset Stock and add a stock of 100 to the record.

Asset Stock quantities are reserved or rented out to customers through orders.

ITEMS TO CONSUME

INVENTORY

Items that are sold, e.g. water bottles or fuel.

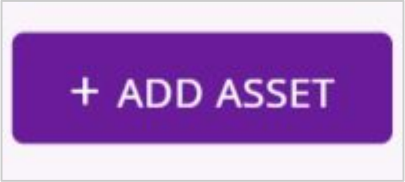
If you have 300 water bottles, add an Inventory. Then add a stock of 300 to this inventory record.

Stock quantities are reserved or sold to customers through orders.

Asset Stock and Inventory modules can be turned off from the Add Ons, if you don't need them.

2.2. Add Items

Let’s go ahead and create an Asset. Click on the quick add button from the top navigation bar or go to *Items* → *Asset* from the side navigation bar. You’ll see the ‘Add Asset’ button in the top right corner:



Once you click on the button, you have to fill out each detail about the Asset in the ‘Create Asset’ form. Let's look at some important fields for you to populate when adding the item details:

Field Name	Description
Group	You can categorize and organize items using groups. Choose from the dropdown menu which Group or Subgroup the new Asset belongs to.
Identification Number	You can assign your own unique sequence numbers to identify items. It can also be printed and scanned as part of a barcode.
Rental Prices	Talk about how to set up rental prices for items
Vendor	You can list all your Vendors in EZRentOut. Then when you’re adding a new item, choose which Vendor you bought the item from.
Location	You can specify which Location the item is stored at.

Similarly, to create Asset Stock and Inventory, go to the respective pages under ‘Items’ from the side navigation bar and you will find the same options available.

You can also create Bundles to package together items that are usually rented out together. To do so, go to *More* → *Bundles* and click ‘Add Bundle’.

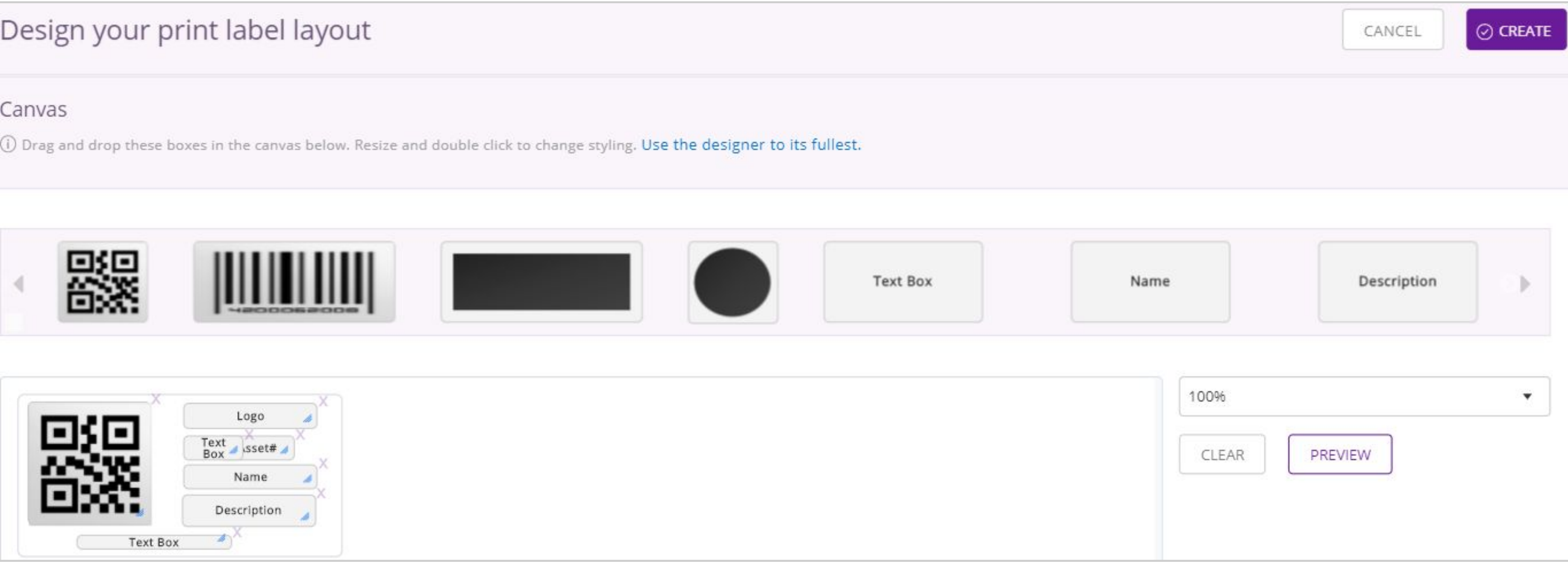
2.3. Add Items via scanning

You can add assets by scanning as many asset labels as you want using a barcode scanner. First enable this feature from *Add Ons → Handheld Scanner Integration → Barcode Reader*.

Now go to *Items → Asset* and click on the 'Add Assets via Scanning' button in the top right corner.

You can scan existing labels or design and print new labels of different sizes, styles and formats using the **label designer**.

Go to *More → Printout Templates* and click 'Add Print Label Template' to start. You can choose to create labels for Items, Bundles, Users, Orders, and Locations.



Note: When using Barcodes it is necessary to enter the 'Identification Number' or a Barcode number for your items.

Learn More: How to setup an external Barcode | QR Code Scanner

More about Label Designing & Printing

Best Practices & Recommendations for QR Codes & Barcodes

2.4. Import Items

You can upload all Assets and their details straight from an Excel file. Go to *Items → Asset → Import Assets dropdown* and select 'Add New Assets'.

When importing items, you need to map the columns to the appropriate fields available in EZRentOut. Go over this [Data Dictionary] to understand what each field means.

If you need to add new fields that are not available in the system, you can do so with the help of **Custom Fields**. Go to *More → Custom Fields* and click 'Add Custom Field'.

Similarly, you can also import data to:

- Create Locations, Groups, Users, Customers, Businesses or Vendors
- Assign Assets to Users
- Add stock to existing Asset Stock or Inventory

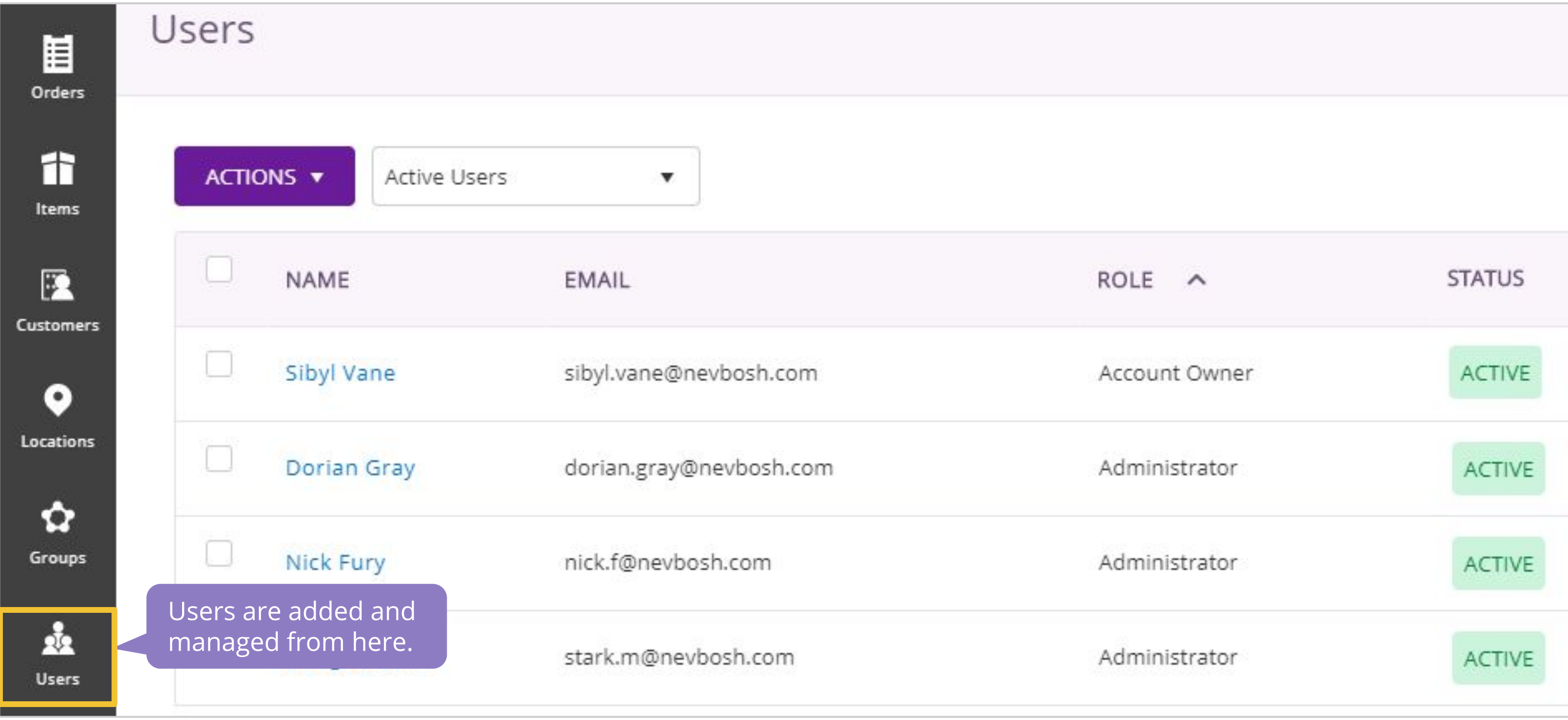
Note: You can also attach relevant documents with an item by going to the Item Details page, scrolling to the bottom to the Files tab and clicking on 'Attach File'.

Learn More: How to Import Items into EZRentOut

3 Add Users

Users are individuals who rent out Assets or Asset Stock items, sell Inventory, work with customers, take orders, receive payments, and more. There are two types of users in EZRentOut:

1. **Admins**, who have full access and can add and update records. They can also take actions for Staff Users.
2. **Staff Users**, who cannot add or update items and can't view reports. They can only take actions for themselves.



Orders can be assigned to users, and reports can be run to know which user is performing better. Each user level gets [different types of alerts]() on various actions.

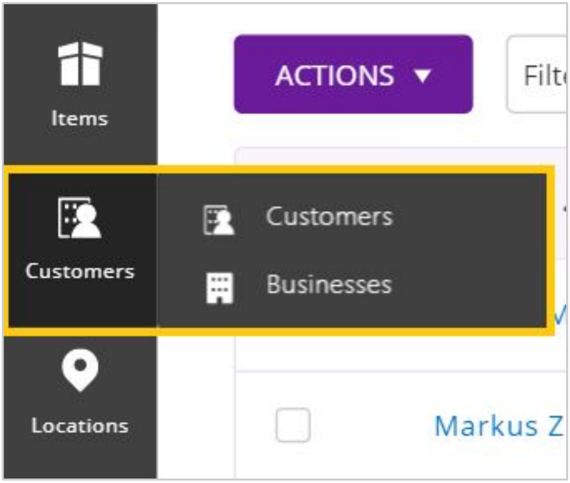
Additionally, you can deactivate users that are not part of your company anymore. From *Company Settings → Policy → Visibility*, you can further configure the **visibility** of Orders for Staff Users.

Learn more about the types of users and their access rights [here]().

4 Add Customers & Businesses

You can add individual customers as well as businesses to your account. From the Customers tab, you can view all your customers, send them emails, and pull up their details.

To do so, go to the Customers tab on the side navigation bar and choose between ‘Customers’ or ‘Businesses’.



Then either click on the ‘Add Customer’ or ‘Add Business’ buttons or simply import from an Excel Sheet.

When adding a new Business, there are two fields worth mentioning:

- Industry: Choose from the predefined list or add your own
- Primary contact name: The main customer associated with that business who is set as a primary contact

Note: Any Customer you add can be associated with a Business within your system. This is helpful when you have to add employees of the same business that are your customers.

Learn More: [Tracking Customers & Businesses in EZRentOut]

5 Introduction to Orders

5.1. Different Order states

All rental and sale transactions happen through Orders.

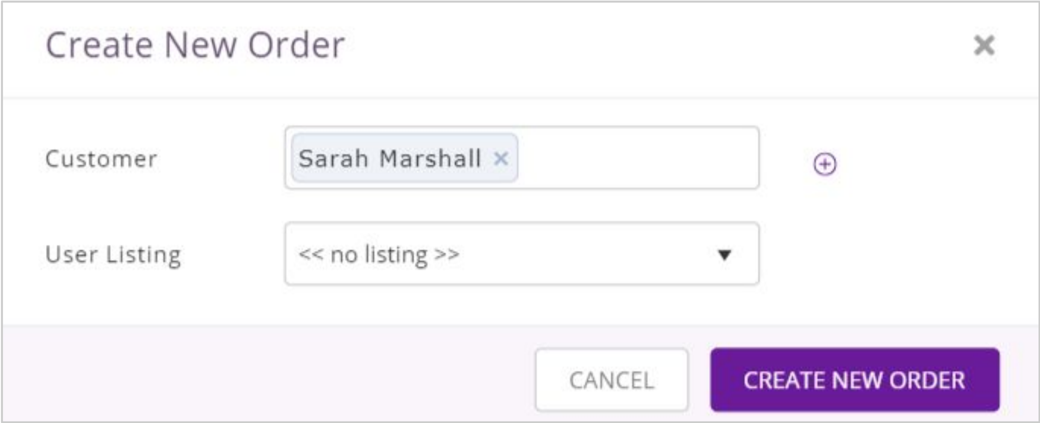
Before we dive deeper into creating and renting out an Order, let's look at all the different states an Order goes through on EZRentOut:

Order State	Description
Draft	When you first create an Order and haven't booked it or rented it out yet.
Booked	When you reserve an Order to rent out in future dates so that the items within it do not become unavailable when needed.
Rented Out	When you finally rent the Order out. You can rent out Drafted Orders and Booked Orders (on the booking date).
Sold	If an Order purely consists of Asset and Asset Stock items that are to be sold, its state will be Sold.
Booked Advance Due	When booked Orders have payment pending on them.
Cancellation Request	Customers can request Order cancellation up till the Booked state.
Cancelled	When you accept the Order Cancellation Request, the Order goes into the Cancelled state. Cancelled Orders become inactive.
Returned	When the items in an Order are returned but payment has not been completed.
Completed	When the payment of an Order is complete, it is marked as Completed. Completed Orders become inactive.
Void	If there are errors in an Order, it can become Void. Void Orders become inactive.

Learn More about selling rental items in EZRentOut [here](#).

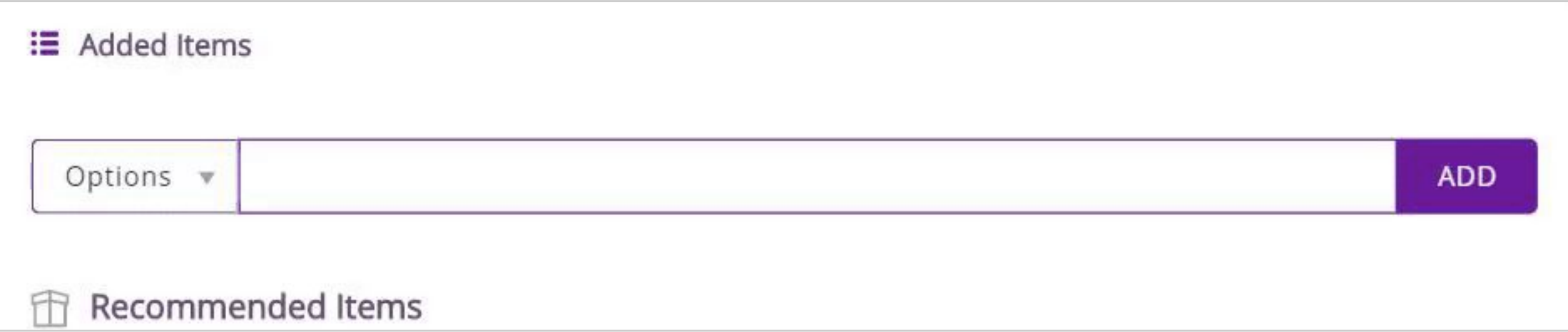
5.2. Create & Rent Out an Order

Add an Order by going to the Orders tab from the side navigation bar and clicking the 'Add Order' button.



1. Specify a Customer to start. Use the 'Add' link in front of the Customer Field to add a new one if you want.
2. Next, select the User Listing the Customer exists in. The **User Listing** is useful to categorize Users according to departments, teams, etc.

Once you click on 'Create New Order', a Draft Order is created. Now scroll down to add items to it using either the Asset name, AIN or Asset#. You can add multiple items to an Order.

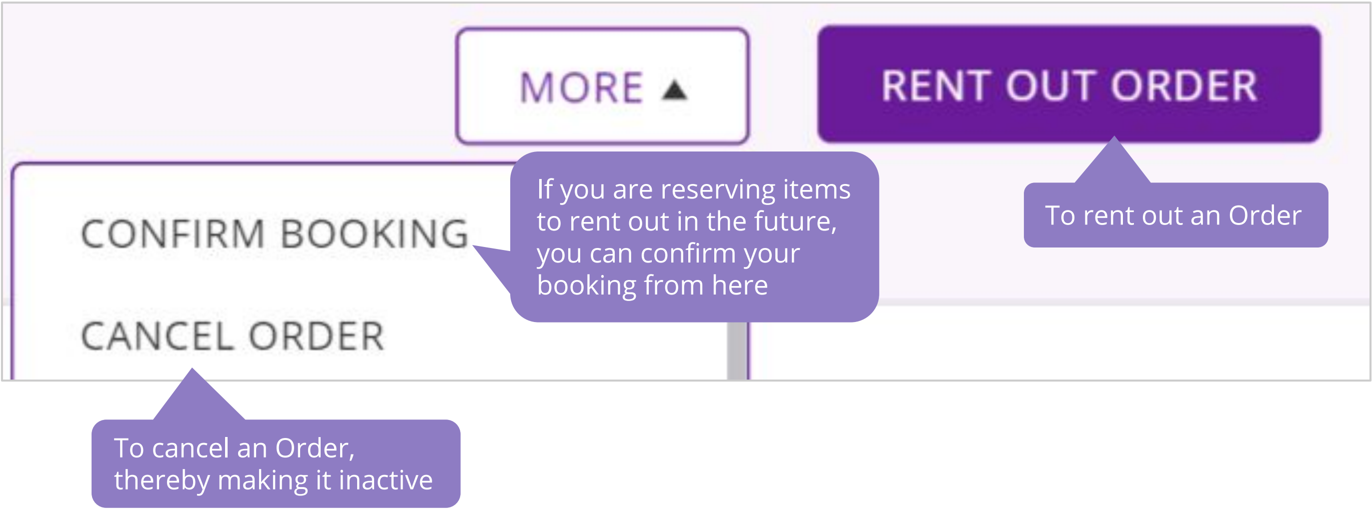


To edit any fields on the Orders Detail Page, simply click on the values you want to enter/update. You can also specify the **Order Duration**, i.e. how long the Items are going to be rented out for.

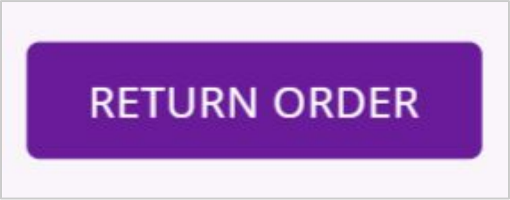
Learn More about Orders in EZRentOut [here](#).

From the Order Details page, you can also specify how customers will receive and return the rental items and at [what locations](#).

After you add items in the Order, you can choose to either rent out the Order or cancel it if needed. To do so, open the Order Details page and click on the relevant button on the top to take the desired action.

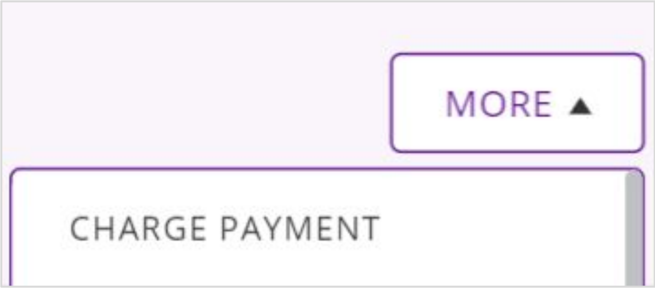


Once an Order is rented out, you can return it by clicking on the 'Return Order' button on the Order Details page.



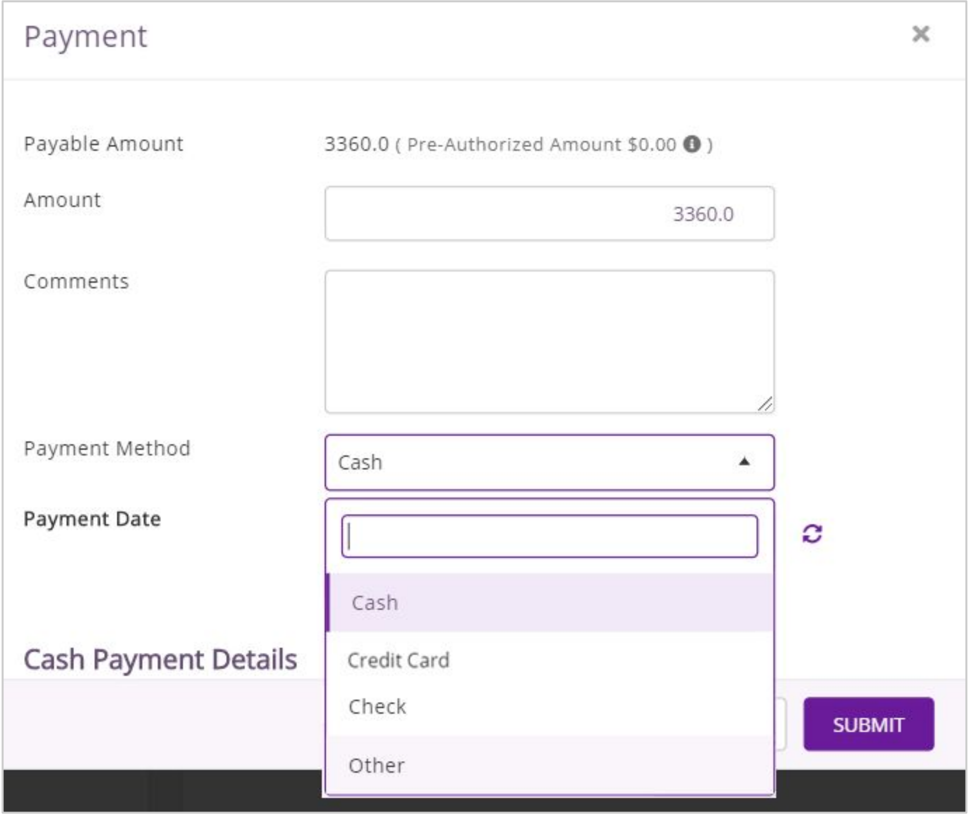
6 Introduction to Payments

You can charge payment for an Order by going to the Order Details page and clicking on 'Charge Payment' button from the More dropdown menu.



You can charge the payment at any point, either before or after the Order has been returned.

EZRentOut also supports Stripe, Authorize.net and Paypal. When charging the payment, you can choose your preferred payment method, as shown below:



If you use any financial software, you can also integrate that with EZRentOut to simplify your financials. Here's a list of the options we support:

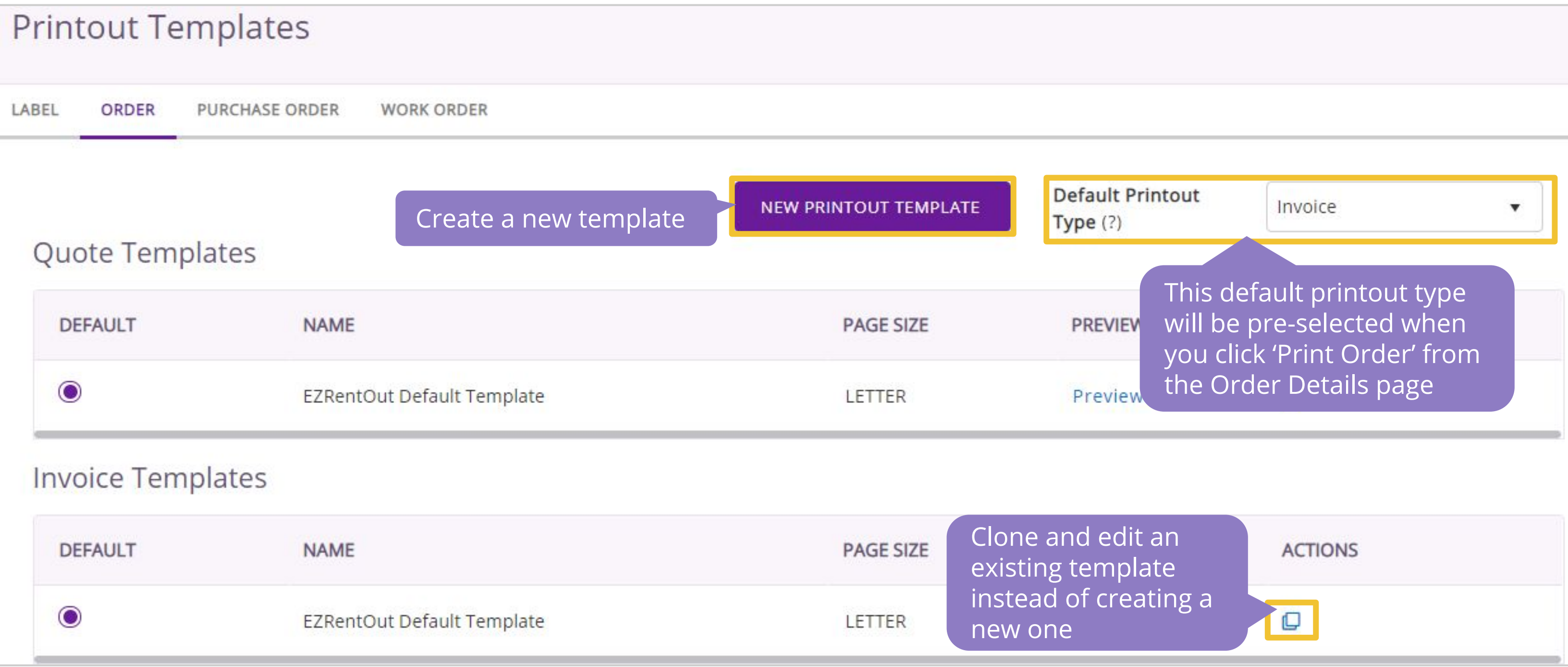
- QuickBooks Online
- QuickBooks Desktop
- Xero

7 Introduction to Printout Templates

You can design and save printout templates for Orders, Purchase Orders and Work Orders, along with labels for Assets.

Order Printouts are particularly useful, helping you communicate important information to customers and employees in a standardized format. These printouts include templates for quotes, invoices, receipts, rental agreements, and packing lists.

To use this feature, go to *More → Printout Templates*.



Once you create a new printout template or click on the 'Clone and Edit' icon, you will be redirected to the **Invoice Designer**, where you can edit the invoice name, layout type, size, header, title, footer and several other elements related to the order.

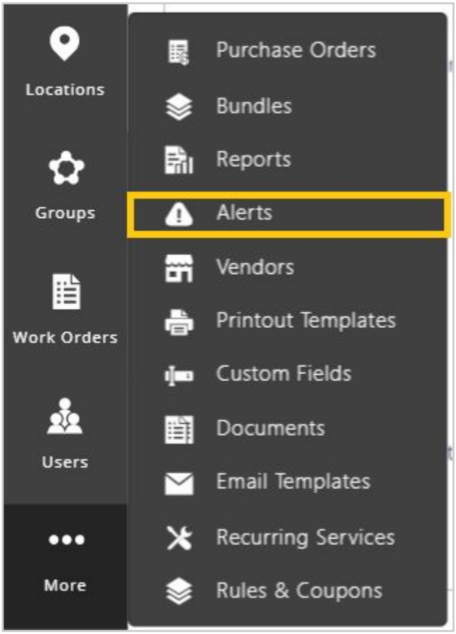
To print an order, go to an *Order Details page → More → Print Order*. An overlay appears, where you can further decide what you want to print on which template, whether to attach the printout PDF to the Order, and choose to make it visible to the customer as well.

Learn More about Printout Templates in EZRentOut [here](#).

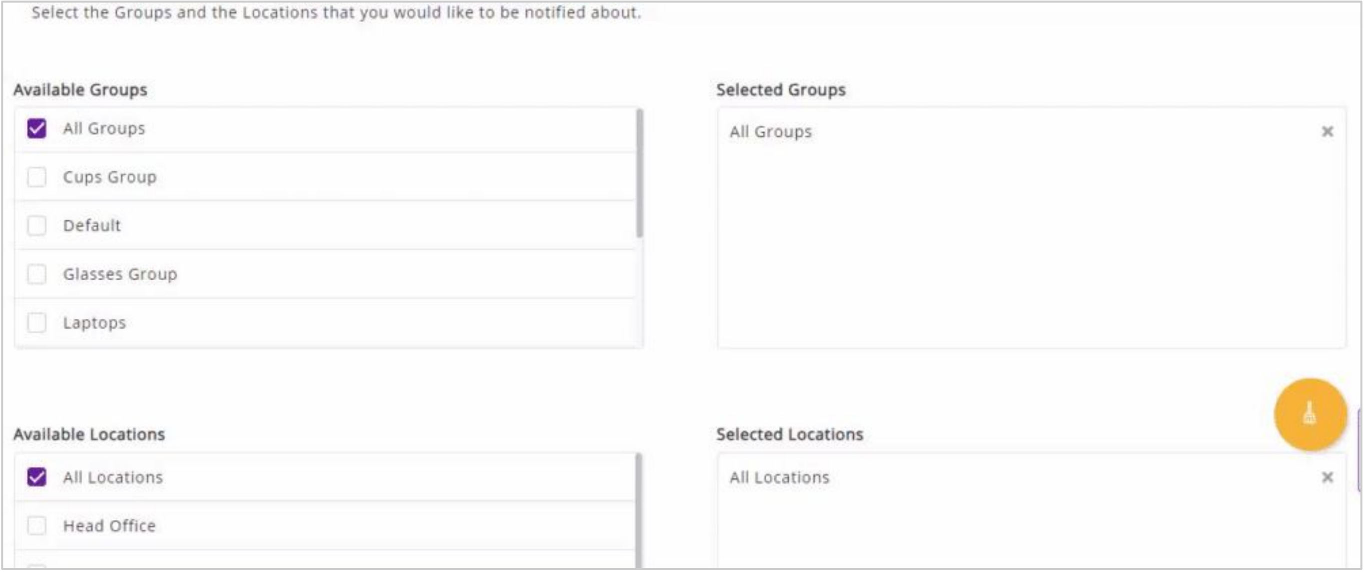
8 Set up Alerts

You can set up Alerts in EZRentOut for numerous events and occurings. Stay on top of all upcoming maintenance sessions or ensure that all relevant parties get alerts about approaching return dates.

To set up Alerts, go to *More → Alerts* and choose whether you want to enable Alerts for yourself, for your staff or your customers, or for vendors.



You can also choose whether you want to limit the alerts by certain Groups, Locations or both.



You can also set up automated alerts and customize email templates for them through *More → Alerts → Email Templates*.

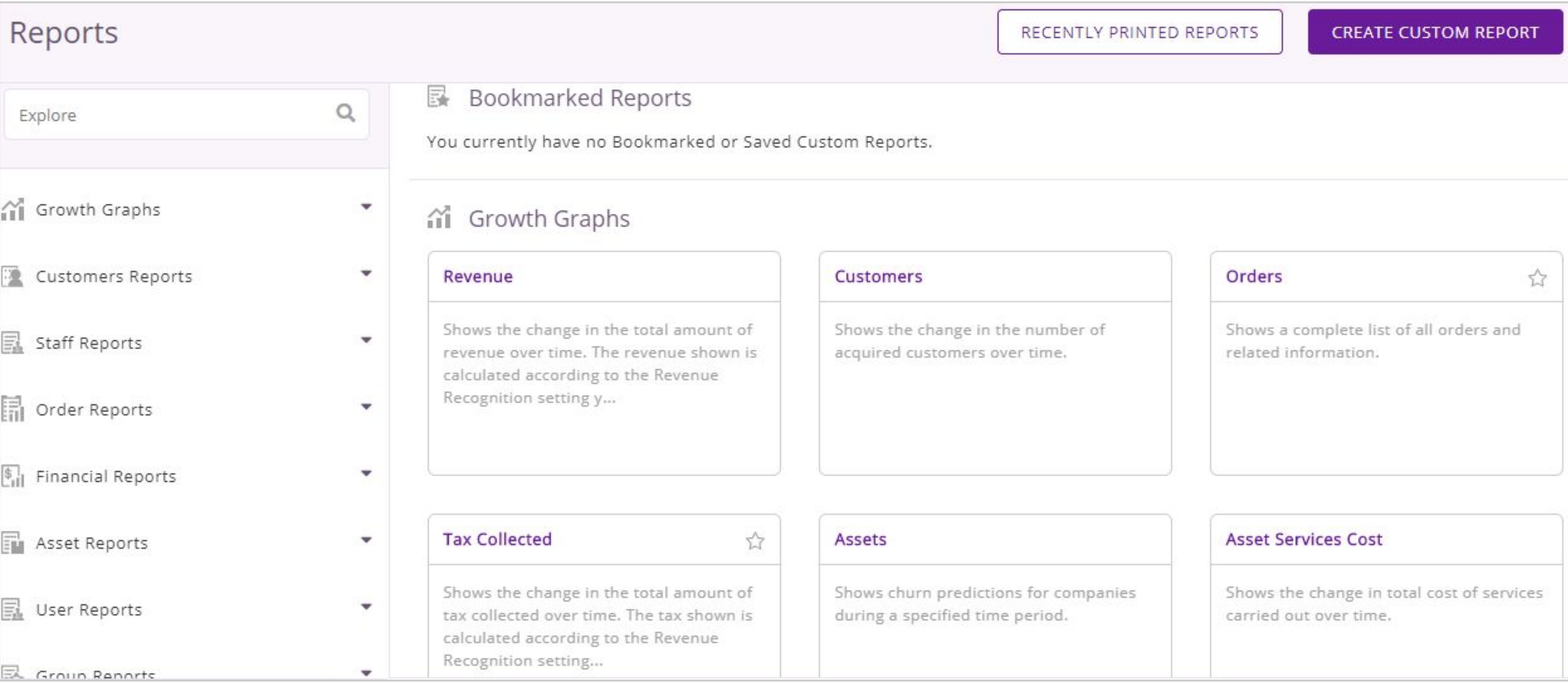
Learn More about setting up Alerts in EZRentOut here.

9 Generate Reports

With the in-depth reports available in EZRentOut, you can make sense of your complex rental data, understand financial trends, maintenance needs, and rental volume.

Access the Reports module from *More → Reports*. Gain valuable insights with reports on:

- Items
- Customers
- Staff
- Orders
- Groups
- Users
- Locations
- Vendors
- Work Orders
- Service & Maintenance
- Bundles
- Purchase Orders
- Sales



To get more specific information catering to your use case, you can also create, save and schedule **Custom Reports**.

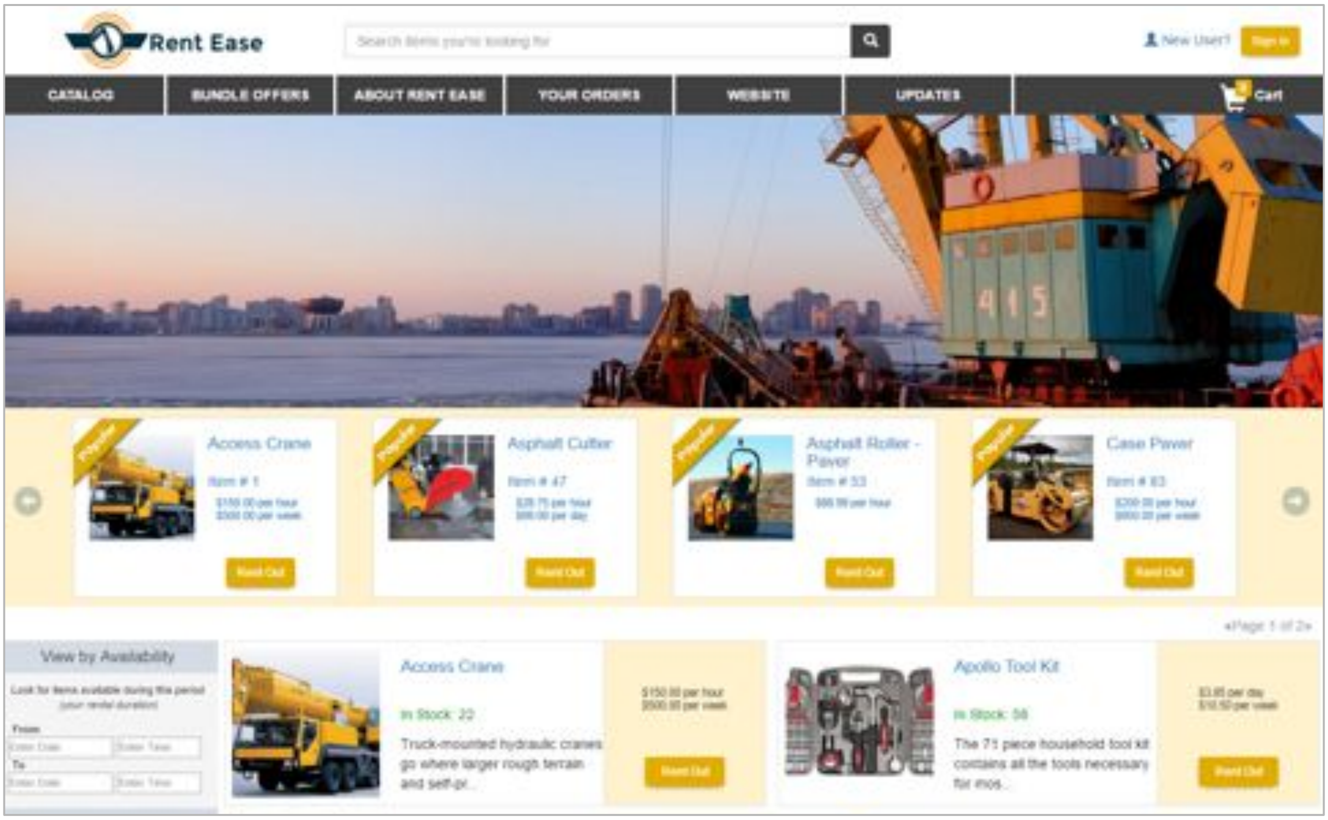
You can also filter reports as per your requirements. For example, for asset reports you can filter by group, location, date, users and vendors. Lastly, to keep your reports safe, you can export them to CSV or PDF.

10 Webstore for Rentals

Take your business online, and unlock endless opportunities by renting and selling items on the Webstore. And your customers can easily pay on the Webstore as well.

To start, go to *Settings → Store Settings*. Here's a list of actions you can take to customize your Webstore:

1. Upload your company **logo** and cover images
2. Tell customers about your company by adding the **'About Us'** tab
3. Add a **Webstore URL** of your own URL/Domain to access and showcase your rental items
4. Control **item visibility** by choosing which items you want to show on the Webstore
5. Choose a **theme** for the store by selecting colors for different buttons, backgrounds, panel bars and more



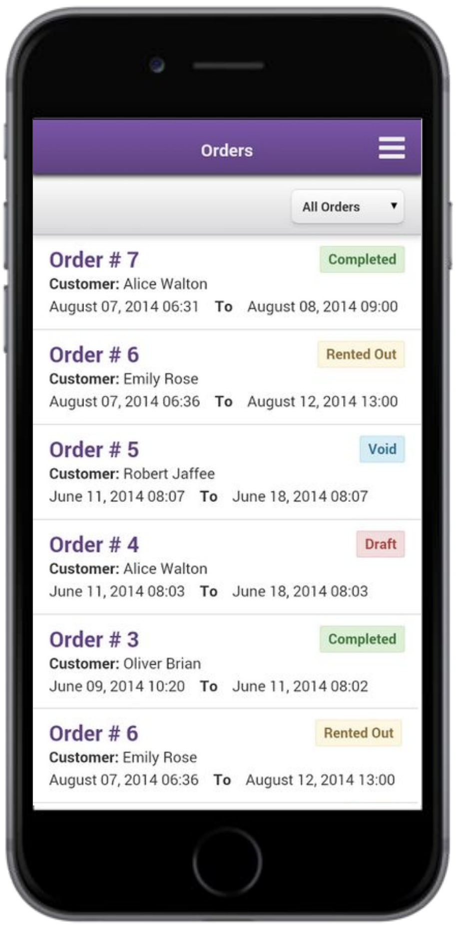
If you already have your own online store, you can integrate it with the EZRentOut Webstore as well.

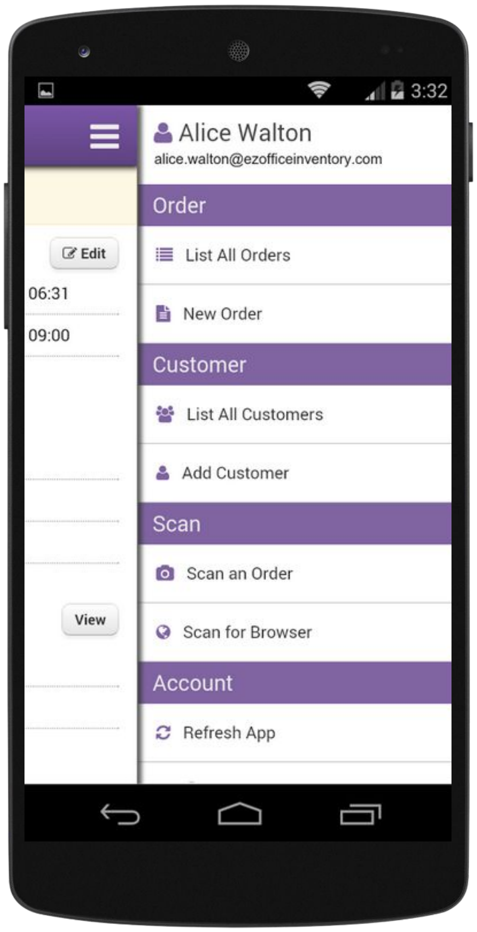
11 Take actions with the Mobile App

Pulling up orders and taking actions is now extremely convenient with the mobile app.

You can take numerous actions with the mobile app, such as scanning invoices to Rent Out and Return Orders, and scanning items to add them to an Order or to verify them.

Download:
For iPhone/iPad | For Android Phones & Tablets

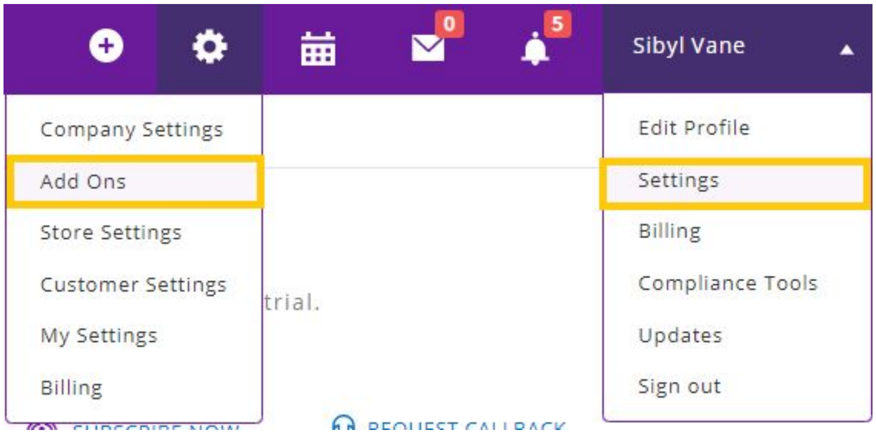




You can also use EZRentOut in Safari, if you're using an iPad.

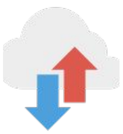
12 More Add Ons and Integrations

Once you're done with the basics, try out Advanced Settings and Add Ons.



In Company Settings, you can choose company logo, select your time zone and configure a number of other policy level settings. Now let's look at some of the popular advanced features:

Bundles to make kits and packages



Connect OneDrive or Dropbox for data backups

Email Templates to customize and design email alerts

Charge late fees for Items not returned in time

Recurring orders that repeat after a certain duration

Customize Order Printouts as per your business standards

Multiple Login Options to sign in using LDAP Server and SAML Integration

Take control of your tasks via Work Orders

Use Fuzzy Lists for managing equipment better

Replenish items to process Orders quickly via Purchase Orders

Please fill out this 30 seconds **Feedback Form** to tell us how we did.

FOR FURTHER ASSISTANCE:

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