



Getting Started with EZRentOut

Rental Management done right!

support@ezo.io

Step 1 – Identify your items

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

ITEMS TO RENT

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 quicker.

Assets are reserved or rented out to customers through orders.

ASSET STOCK



Rental items that are NOT tracked individually e.g. cables or chairs.

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

Asset Stocks Quantities are reserved or rented out to customers through orders.

ITEMS TO SELL

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.

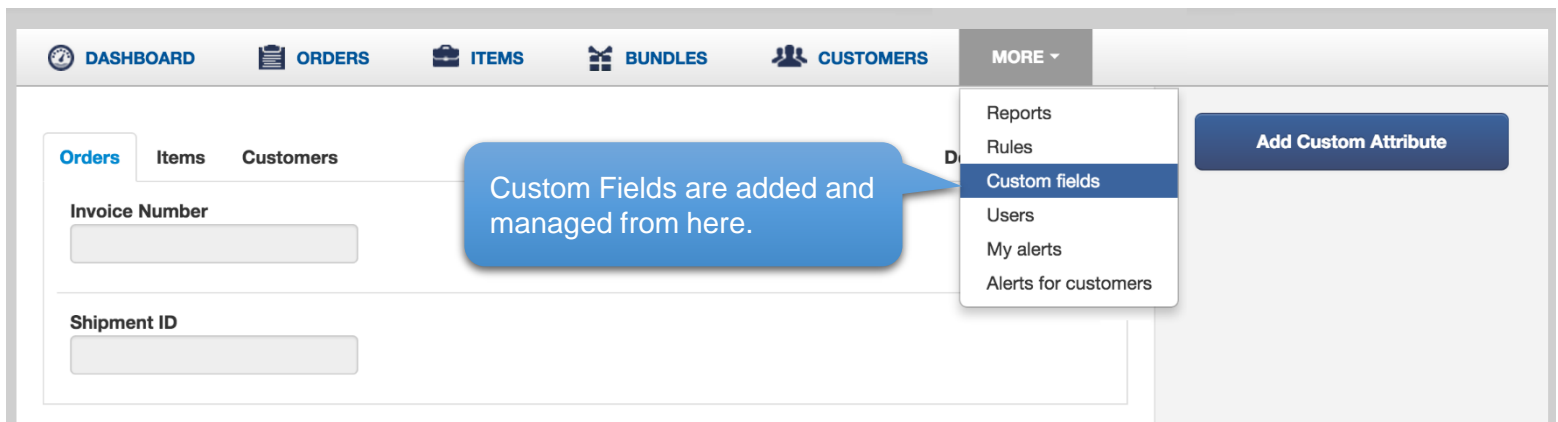
Stock Quantities are reserved or sold to customers through orders.

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

Step 2 – See if you need Custom Fields

Items in EZRentOut come with predefined set of fields. However, if they are not sufficient for your needs, you can add custom fields.

Custom Fields are also available for Orders and Customers but they will be discussed when orders and customers are introduced in the subsequent steps in this manual.



Different item groups can have different Custom Fields.



[Learn More](#)



Asset #33: DSLR Camera with Lens

Focal Length	28 – 200 mm
Image Stabilization	Yes
Shutter Speed Step	1/2

Step 3 – Add Items

Let's go ahead and create a few rental and sale items.

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Add an Asset	Clone if you've similar items	Explore an Asset's Detail Page
Start by adding an asset, say a Forklift Truck	If you've 10 Trucks, you can make 9 more copies of the first Forklift Truck (in a single action).	You can add images and documents, add comments, keep a log of services, and take a number of actions.

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Add an Asset Stock	Add Stock to it	Explore the Detail Page
Start by adding an asset stock record, say Chairs	Once the record is created, add stock to it e.g. 100 Chairs at Manhattan, 70 at Bronx.	You can add images and documents, add comments, and take a number of actions. There is also a list showing Current Checkouts.

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Add an Inventory	Add Stock to it	Explore the Detail Page
Start by adding an inventory record, say Water Bottles	Once the record is created, add stock to it e.g. 100 Bottles at Manhattan, 30 at Brooklyn.	You can add images and documents, add comments, and take a number of actions.



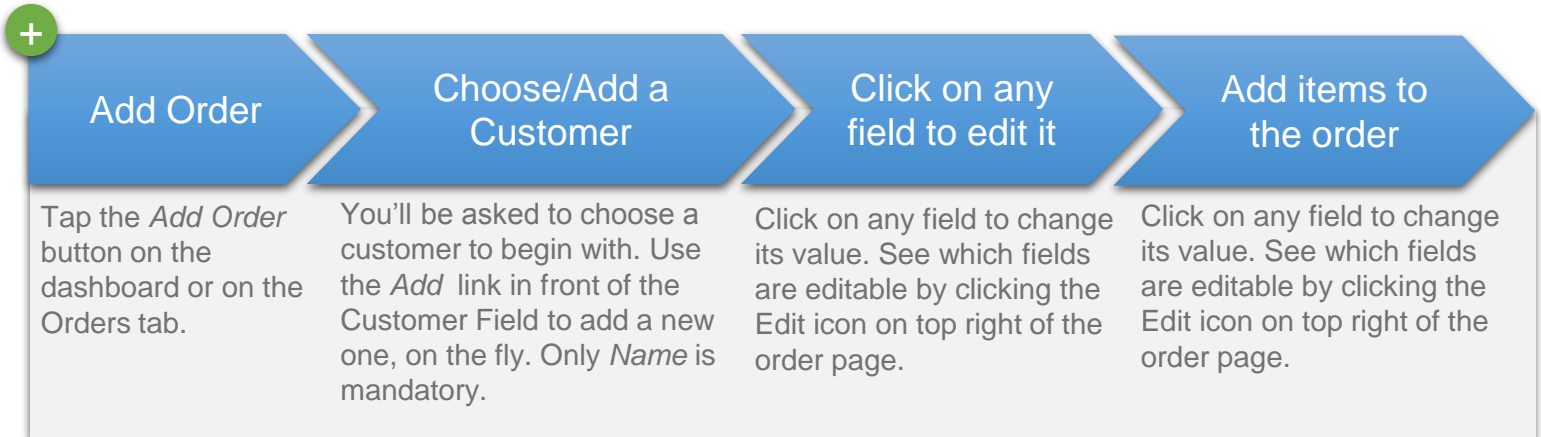
If you have items in Excel Sheets, import them directly to EZRentOut.



[Learn about best practices](#)

Step 4 – Create your first order

All Rental and Sale transactions happen through orders.



There are availability cues when you're adding items to an order, so that you draft an order without any scheduling conflicts.

[>>Collapse View<<](#)

Item #	Name	Current Location	Duration/Quantity	Price	
x 10	Prius - one	Manhattan, NY	6 Days	\$510.00	▼
x 54	Ford Clubwagon E350	Manhattan, NY	6 Days	\$1,800.00	▼
x 134	Forklift: CAT	Manhattan, NY	144 Hours	\$3,600.00	▼

This asset is Checked Out for order# 87
from: June 08, 2015 06:14
to: August 04, 2015 10:16

See if you need...

- **Custom Fields:** Can be added from MORE → Custom Fields → Orders
- **Separate Billing Duration:** If your Rental and Billing durations are different, have a look at *Your name at top right* → Settings → Add Ons → Billing Duration
- **Customized Invoices:** Basic invoice customization is available under Settings → Company Settings → Customization of Invoice. Or you can design an invoice from scratch using the invoice designer under Add Ons.

Step 5 – Get cozy with your first order

Order# 97 Draft

(Payment pending: \$5,001.47)

Expected Rent Out Date June 17, 2015 03:48 **Expected Return Date** June 24, 2015 03:48

Order Duration 1 week

Location Boston Add

Customer Kevin Martinez ✖ ✉

Discount 0.000% **Assigned To** Jennifer Robinson 👁

Heading on Invoice QUOTATION - Martinez Construction Works

Add Items Add Advanced Options

Show only available assets for given duration
 Sort by proximity to customer
 Show only available bundles for given duration

>>Collapse View<<

Item #	Name	Current Location	Duration/Quantity	Price	
x 131	A Forklift: CAT	Boston	168 Hours	\$4,200.00	
x 145	A Forklift: Indoor	Boston	168 Hours	\$1,680.00	
x 70	I Gas - Premium	Boston/Main Warehouse	10 @ \$4.08 per unit	\$40.80	
+ New Row (for sub-renting or ad-hoc items etc)					
				Items Sub-Total	\$5,920.80
				Federal Tax: 10.0%	\$592.08
				Damages	\$0.00
				Total	\$6,512.88
				Paid Amount	\$0.00
				Refund	\$0.00
				Payable Amount	\$6,512.88

Action Buttons

Rent Out Order

Confirm Booking

Charge Payment

Verify by scanning

Change Tax Rate

Custom Entry

View Invoice

Add Coupons

Items List ▾

History ▾

Order Details Help

Editing an order

Custom Entry

Items in an order

Current Location

Taxes

¹ Credit Card Payments should be enabled from Add Ons

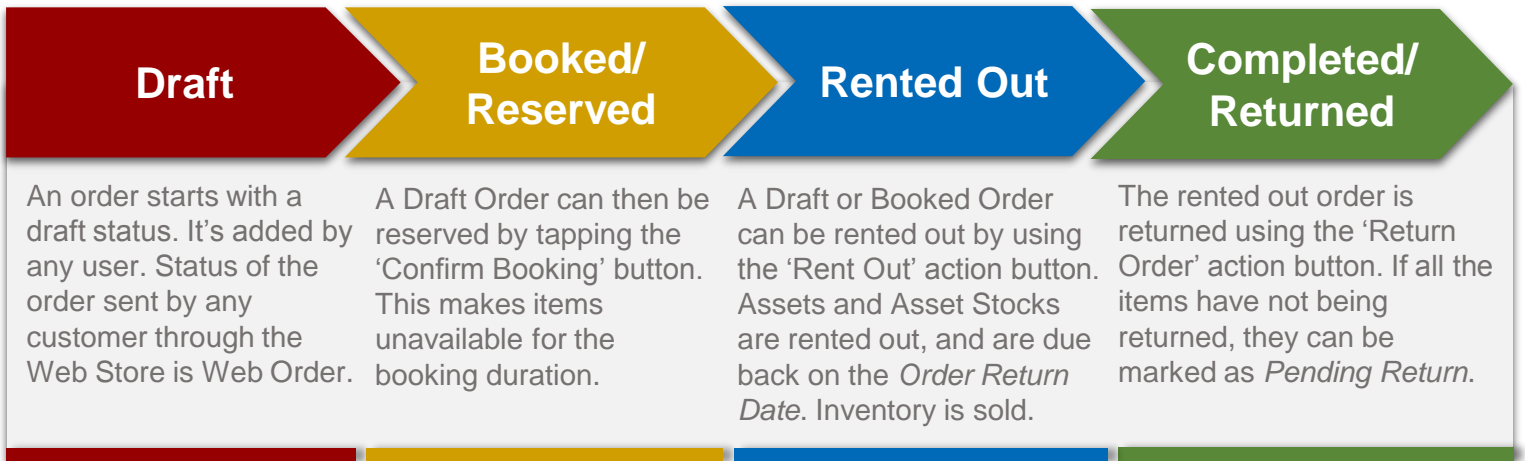
² Should have email address in the records

³ Prices and Rental Rates are added to items. If you want to over-ride them in the order, choose this option in Settings → Company Settings

You can also add comments to an order, and attach documents to it.

Step 6 – Rent Out an Order

Reserve your draft order or rent it out. Here are the main phases, an order goes through.



Try out other actions, such as Charging Damages, Custom Entries (to add any charge or adjustment), Printing Invoice.

Use the 'Charge Payment' button to record payment against an order. All payments for an order are recorded separately with a detailed Payment History.

Orders that have been returned/completed, but still have outstanding payments are shown with the Payment Pending status.

Order# 95 Payment Pending
(Payment pending: \$4,000.00)



[Learn more about orders](#)

Step 7 – Populate your Customers Directory

From the Customers tab, you can view all of your customers, send them emails, and pull up their details.

Actions	Phone Number	Email	Checked Out Orders
<input type="checkbox"/> Alex Kinsey	--	--	0
<input type="checkbox"/> Emma Robinson	585-988-8955	emma.robinson@rentoutexample.com	1
<input type="checkbox"/> Henna Lambert	898-215-9875	henna@ezrentoutexample.com	0
<input type="checkbox"/> Irenena Williams	325-865-9866	irenena@rentoutexample.com	1

Divide customers in categories, manage contacts and do more.

Emma Robinson
Corporate Customer
89 orders to date
\$5,500 worth of orders, this month

Contact Details
emma@example.com
Phone: 338-879-3335
421 East 70th Street
New York, NY 10021



[Learn more about Customer Management](#)



If you have customers information in Excel Sheets, import it directly to EZRentOut.

Step 8 – Strike conversations with your customers


From the Customers Tab: Send Newsletters, Promotions etc.

To:
4118 - Alexis Ohanion 14013 - Amanda Clark

Subject:
Summer Deal: 20% off on Jet Skis

A Heading 3 ▾ B / U [List Icons] [Link Icon] [Image Icon]

Good news! We're **offering 20% off** on all Jet Skis.
Drop by now and avail this limited time offer.



Send Email Cancel

From an Order Page: Send Quotes, Invoices and Payments Notes

To:
Kevin Green <kevin@example.com>

Subject:
Reminder - Payment Due

Attach Invoice
 Ask for payment
 Send me a copy

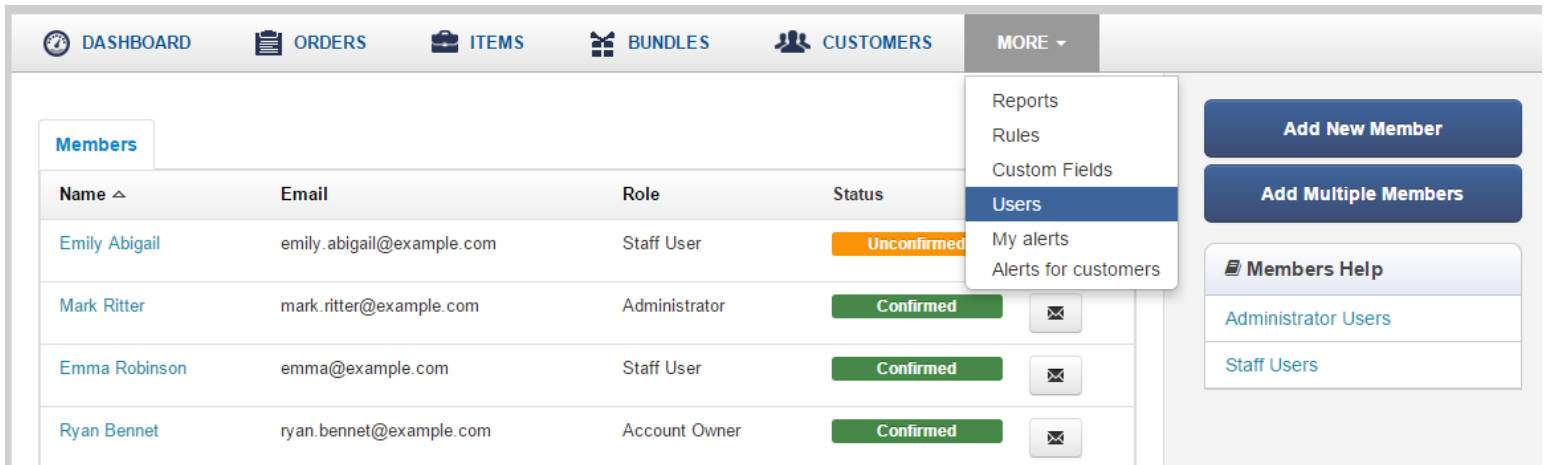
A Normal text ▾ B / U [List Icons] [Link Icon] [Image Icon]

Hi Kevin
Payment of \$6,212.00 is pending. [Log-in](#) to your account to view details and make a payment.
You can call me at 408-601-333, if you're running into any issues.
Best
Ryan

Send Email Cancel

Step 9 – Add your staff

Add your staff (users) to EZRentOut, so that everyone on your team can work with customers, take orders, receive payments, and do more.



Name ^	Email	Role	Status
Emily Abigail	emily.abigail@example.com	Staff User	Unconfirmed
Mark Ritter	mark.ritter@example.com	Administrator	Confirmed
Emma Robinson	emma@example.com	Staff User	Confirmed
Ryan Bennet	ryan.bennet@example.com	Account Owner	Confirmed

Users can be Admins or Staff Users. **Admins** have full access, can add and update items, and run reports. **Staff Users** cannot add or update items. Access and Visibility rights for staff can be configured from *Your name at top right* → Settings → Company Settings.

Orders can be assigned to users, and then reports can be run to know who is performing better.



Mark Ritter
mark@example.com

Staff at Front Desk # 1

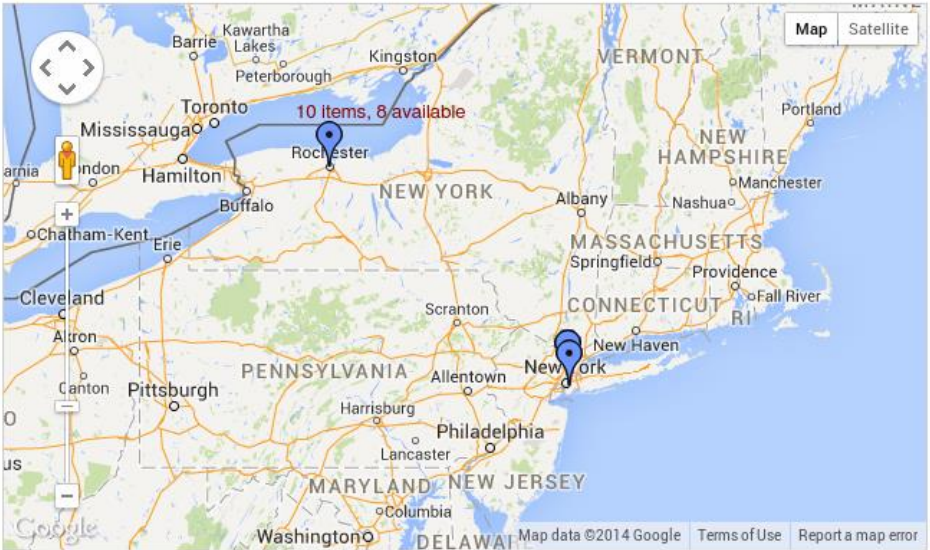
5 orders assigned to him

Closed \$25,000 worth of orders, this month

Step 10 – Locations, Groups and Vendors

Assets Asset Stock Inventory Groups Vendors Custom Attributes **Locations**

Locations List by assets locations ▾



Map Satellite

Map data ©2014 Google Terms of Use Report a map error

- Brooklyn, NY
- Manhattan, NY
- Rochester City

Groups

Use groups and subgroups to categorize your items. For example, all the Camera Lens and Tripods can go to Camera Accessories group.

Vendors

Vendors who provide services, or supply assets and inventory, go here. For example you can record all services that Caterpillar provided for your cranes. Or all the cranes that you got from Caterpillar.

Locations

Orders, Assets and Stock can be tracked across different locations. If you provide the correct address when adding locations, we'll show your items on a map. These locations can also be building rooms, warehouses or cabinets.

Step 11 – Try out different listing views

Turn on Compact View in Assets to combine items with same names

Toggle to Thumbnails

Asset#	Name	Location	Custody
670	Macbook Air 11"	California	Adam Green
669	Macbook Air 11"	Vegas	Amber Rose
654	HP Chromebook 11 G3	California	Adam Green

Customize Columns

Asset#	Name	Description	Custody
670	Macbook Air 11"	MacBooks for offi...	Adam Green

Similar to Compact View on Assets, there's *Location Stock View* on Inventory and Asset Stock. This view shows stock quantities by location instead of showing the total quantity per item.

You can increase the page size from Settings → My Settings

Step 12 – Print QR Code or Barcode Labels

Design and print professional grade QR Code or Barcode labels and tag your items.

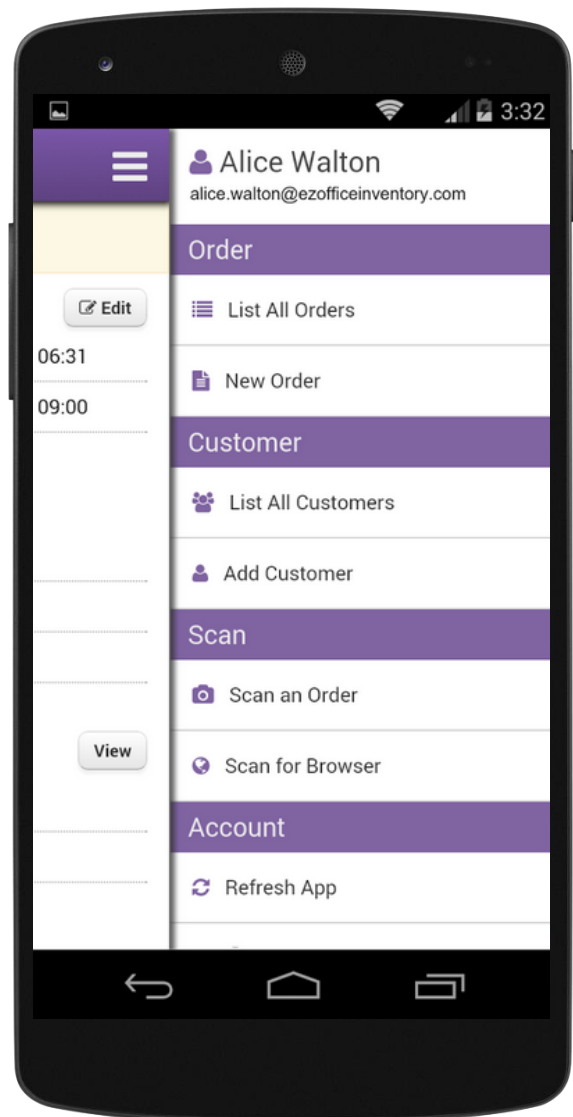
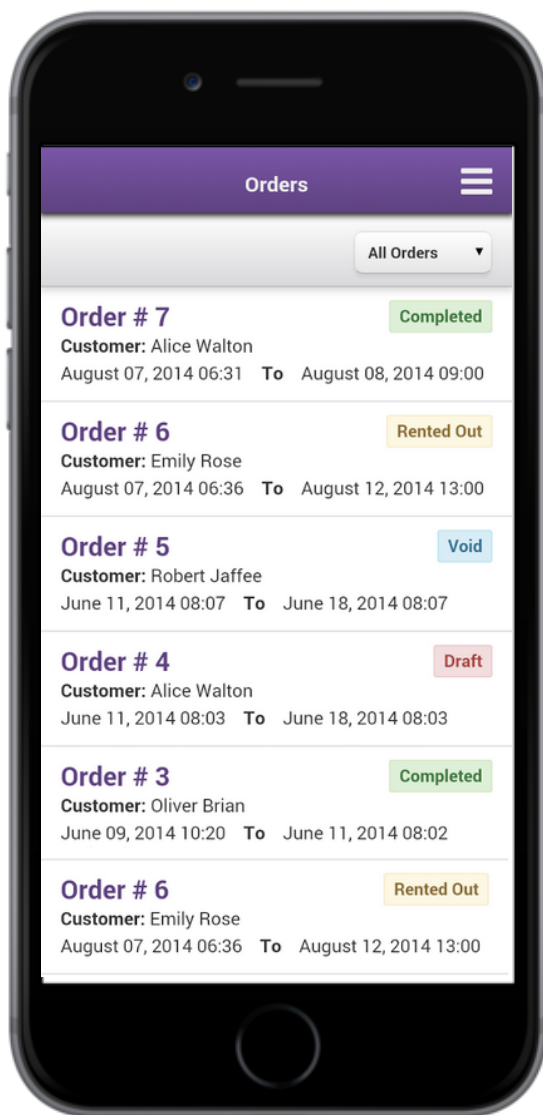


[Learn more about Label Designing & Printing](#)

Step 13 – Use mobile apps to scan labels and take actions

Pulling up orders and taking actions becomes extremely convenient with the mobile apps. Scan invoices to rent out and return orders. Scan items to add them to 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. Order Tab is what you'll have open on your front desk for operations.

Step 14 – Set up Point of Sale



Set up a Point of Sale (POS) for the checkout desks in your store.

Customer Walks In



Add an order for the customer



Scan Rental/Sale to add to order



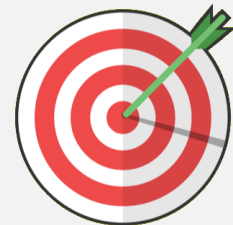
Swipe Credit Card to charge payment



Email/Print Invoice



Voilà



[Learn more about POS](#)

Step 15 – Set up your Web Store

Put your business online, and unlock endless opportunities. Start from Settings → Store Settings

DEMO A Search items you're looking for

STORE **ABOUT** **YOUR ORDERS** **CART**

Unbeatable Rental Rates

Popular **Forklift Truck – JD** Item # 100
\$50 per hour
\$100 per day
\$250 per week
\$800 per month

Popular **Prius C Car** Item # 07
\$100 per day

Popular **Breakfast Platter** Item # 507
\$10 per unit

<< Page 1 of 4 >>

Shop by Availability
Look for items available during this period (your rental duration)
From To
To

Shop by Categories

- Forklift Trucks - John Deere
- Forklift Trucks - Mitsubishi
- Forklift Trucks - Hyster
- Wi-Fi Hotspots
- Fuel and Gas
- Projectors
- Large Cranes

Shop by Price

Above: \$0

Forklift Truck – JD Item # 199
Heavy duty, robust and fuel efficient. John Deere's forklift for outdoor and indoor usage.
\$50 per hour
\$100 per day
\$250 per week
\$800 per month

Indoor Forklift – JD Item # 100
Heavy duty, robust and fuel efficient. John Deere's forklift for outdoor and indoor usage.
\$100 per day
\$800 per month

NEC Data Projector Item # 8
Projector for crisp videos and presentations. Comes with the full mount and protective cover.
\$50 per hour

Forklift Indoor Mini Item # 198
Heavy duty, robust and fuel efficient. John Deere's forklift for outdoor and indoor usage.
\$50 per hour
\$100 per day
\$250 per week
\$800 per month

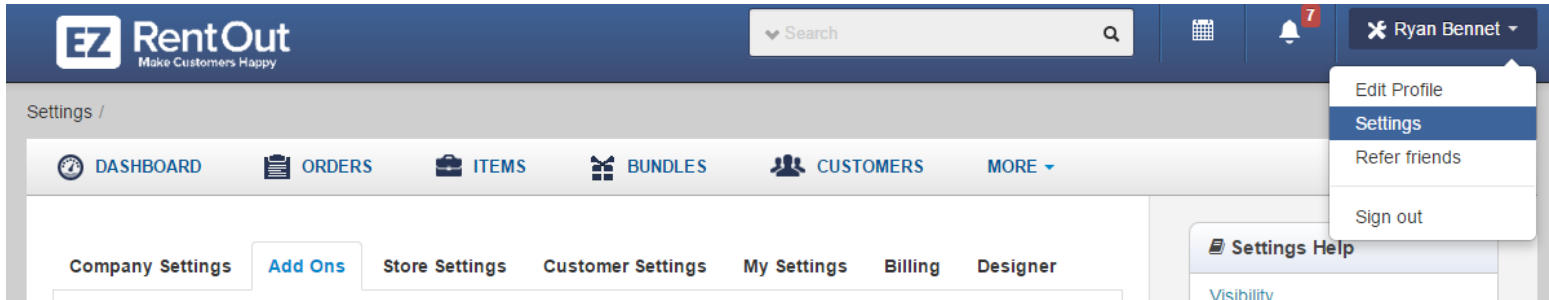
Gas Premium Item # 2087
Premium gas that you can buy for the machinery you
\$5.25 per unit

Gas Regular Item # 2052
Regular gas that you can buy for the machinery you
\$5.25 per unit

The new version is arriving this summers.

Step 16 – Explore Add Ons and Integrations

Once you're done with the basics, try out Advanced Settings and Add Ons. There're over a dozen of them.



In Settings, you can choose company logo, select your time zone and configure a number of other policy level settings. Here are some of the popular advanced features.



Xero and QuickBooks
Financial software
integrations



Recurring orders that
repeat after a certain
duration



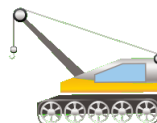
Availability calendar
to plan better, and
stay on top of things



Online payments
through PayPal,
Authorize.net & Stripe



Bundles to make kits
and packages



Maintenance module
to keep equipment in
best shape

We're here to help!



If you have any questions or feedback, write to us at support@ezo.io

Check out the Knowledge Base for help topics

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