



# Store Manual

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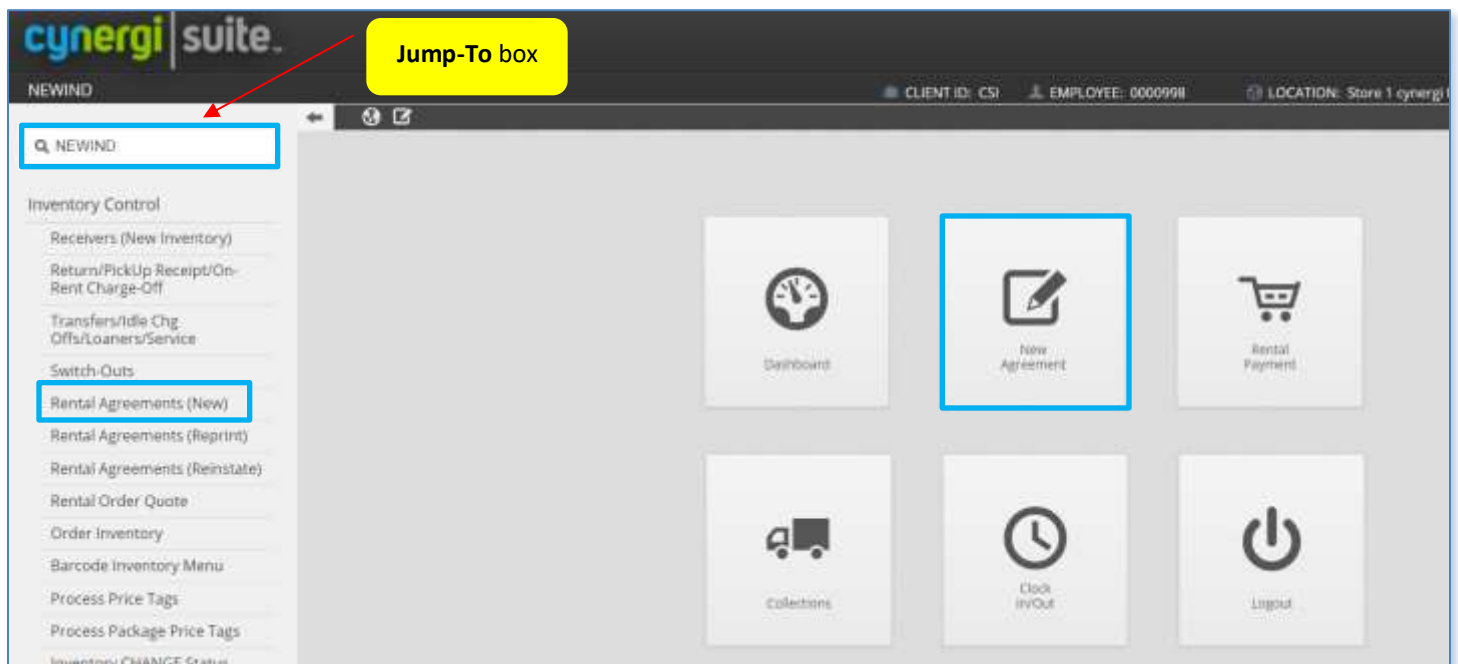
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## Chapter 3: Agreements

### Add a New Agreement

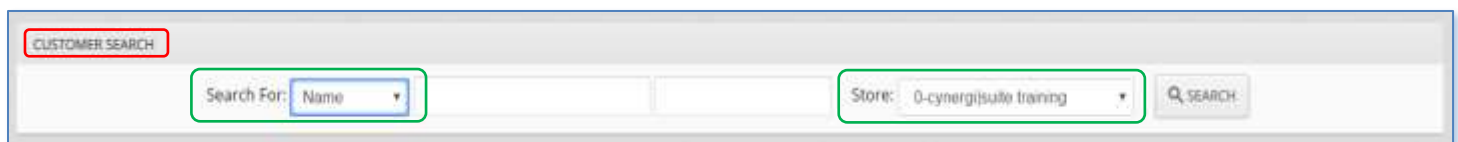
To create a new agreement, type **NEWIND** in the **Jump-To** box and press the **TAB** or **ENTER** key. Alternatively, you can use the **New Agreement** button on the **Home** screen or select it from your company's side bar.



*Please Note: Your menu options may be different than what is shown above.*

A box titled *Customer Search* appears, along with two drop-down boxes. The first box, labeled **Search For**, is defaulted to allow input of the customer by name (last name first). The second box, labeled **Store**, is defaulted to search in "O" which will search for active and in-active customers.

*Please Note: The **Search For** box default can be changed to allow searching by Account #, Address, License, Phone, or SSN.*



Enter the customer name, last name first. Then press the **TAB** or **ENTER** key twice to begin the search. You may also use the mouse to click the **SEARCH** button.

*Please Note: A partial name may be entered for either last or first name.*

CUSTOMER SEARCH

Search For: Name \* SMITH JEFF Store: 0-cynergi|suite training SEARCH

Once the search is complete, the search results will be shown below. Customers are listed in alphabetical order. If the search performed is very broad, the results may be split into groups containing a maximum of one hundred customers each. These groups are further split into multiple pages containing ten customers each.

CUSTOMER SEARCH

Search For: Name \* SMITH JEFF Store: 0-cynergi|suite training SEARCH

**\*\* ONLY GROUP FOR YOUR PARAMETERS \*\***

Store	Account	Last Name	First Name	Address	City	License
	1001429	SMITH	JEFF	577 BEN LOMOND A	ANYTOWN	
	7002648	SMITH	JEFF	651 S BUNBURY CO	ANYTOWN	

Showing 1 to 2 of 2 entries

ADD CUSTOMER PREV 100 NEXT 100 MAIN MENU

**\* FIRST RESULTS GROUP \***

Store	Account	Last Name	First Name	Address	City	License
	1004424	S.O.S. (CHRI	CHRIS	3025 WASHINGTON	ANYTOWN	
	5003767	SA	LAMATIA	4930 W 4865 S	ANYTOWN	
1	6001297	SAAR	KRISTON	5660 S 3200 W	ANYTOWN	
	1006778	SAAVEDRA	CARLA	1333 GRANT AVE	ANYTOWN	
	5002502	SAAVEDRA BRWQ MELISSA	SAMANTHA	6300 S 4158 W	ANYTOWN	
	5000204	SAAVEDRA RIVERA BRENDA	JONATHAN C	3851 COBBLE RIDG	ANYTOWN	
8	8000983	SABEY	ANGELINA	210 E 600 S #520	ANYTOWN	
	5003041	SABIC	AMELA	4605 S SUNSTONE	ANYTOWN	
	4000881	SABIC	ELVIRA	3886 W. MOORGAT	ANYTOWN	
	6000613	SABIN	EMILY	1641 N 2140 W	ANYTOWN	

Showing 1 to 10 of 100 entries

1 2 3 4 5 Next Last

ADD CUSTOMER PREV 100 NEXT 100 MAIN MENU

*Please Note: The first column titled "Store" will display the store number assigned to active renting customers. If a store number is not displayed, the customer does not have active rental agreements.*

If the customer you are searching for is shown in the list, select him or her by clicking anywhere on the line displaying the customer name. If the customer is not found, click the **ADD CUSTOMER** button to add them.

CUSTOMER SEARCH

Search For: Name: SMITH First Name: JEFF Store: 0-cynergi|suite training SEARCH

\*\* ONLY GROUP FOR YOUR PARAMETERS \*\*

Store	Account	Last Name	First Name	Address	City	License
	1001429	SMITH	JEFF	577 BEN LOMOND A	ANYTOWN	
	7002648	SMITH	JEFF	651 S BUNBURY CO	ANYTOWN	

Showing 1 to 2 of 2 entries

ADD CUSTOMER PREV 100 NEXT 100 MAIN MENU

If you have selected the customer from the list, the screen will display the primary customer information. Changes can be made if necessary.

If you have selected **ADD CUSTOMER**, fill out the fields in the screen below. There are a few fields that are required, but if you do not have the information needed for these, a "1" may be entered to allow you to continue.

There are additional customer information tabs available in the top right of the screen that are not required but may be filled out as needed.

PRIMARY CUSTOMER ALTERNATE ADDRESS REFERENCES EMPLOYER LANDLORD 2ND CUSTOMER CAR INFO MARKETING INFO

Last Name: SMITH First Name: JEFF

Account#: 1001429

Address: 577 BEN LOMOND AVE Zip: 55555-0000

Address Line 2: City/State: ANYTOWN TX

Primary Phone#: (555)555-5555 Birth Date: 4/22/1965

Work Phone#/Ext: (555)555-5555 SSN: 000-00-0001

Secondary Phone#/Cell#: (555)555-5555 Send Verification Code Drivers Lic#: 1

Alternate Phone#: (555)555-5555

Click **SAVE** when changes are complete.

Acct. Mgr: 1-EMPLOYEE 0001 Customer Type: RENTAL

RTO Receivable Amt: 3.50

Email Address:

Allow Online Pmt: Yes Allow Recurring Pmt: Yes

Default PO#: Best Time to Call:

Default Store#: 1-Store 1 cynergi training Retail Conversion Cust?: No

SAVE VERIFY COMMENT BACK MAIN MENU

## New Agreement Add

The screenshot shows the 'NEW AGREEMENT ADD' form with the following fields and values:

- Customer Name: SMITH, JEFF
- Account #: 1001429
- Agreement #: 362020
- Agreement Date: 9/24/18
- Store #: 1
- Customer Type: RENTAL
- Agreement Terms: OTHER WEEKLY C
- Length: 78
- Payment Terms: Weekly
- Agreement Type: Rent To Own
- Tax Group: TX1
- Rules: [empty]
- Package Code: [empty]

Buttons: SAVE, MAIN MENU

**Agreement #:** automatically populates with the next sequential rental agreement number

**Agreement Date:** defaults to the current date

**Store #:** defaults to the store logged in to

This close-up shows the following fields highlighted with red boxes:

- Agreement #: 362020
- Agreement Date: 9/24/18
- Store #: 1

**Customer Type:** select the appropriate option from the pick list.

*Depending on system configuration, RENTAL is standard for RTO applications*

**Agreement Terms:** select the appropriate option from the pick list.

*Depending on system configuration, Other Weekly code X and Other Monthly code Z are standard for RTO applications  
Your pick list may have alternate options*

If selecting "Other Weekly" or "Other Monthly," enter the **Length** (Term) of the rental agreement.

**Payment Terms:** select the appropriate option based on the "Agreement Terms."

*Example: If selecting "Other Weekly," you will have the option to select Weekly or Bi-Weekly. If selecting "Other Monthly," you will have the option to select Monthly or Semi-Monthly.*

*Depending on system configuration, the Payment Terms may automatically populate.*

**Agreement Type:** select the appropriate option from the pick list (Rent To Own is standard for RTO applications).

*Depending on system configuration, your pick list for Agreement Type options may have several options (Rent to Rent, Club Agreement, Special Order).*

This close-up shows the following fields highlighted with blue boxes:

- Customer Type: RENTAL
- Agreement Terms: OTHER WEEKLY C
- Length: 78
- Payment Terms: Weekly
- Agreement Type: Rent To Own

**Tax Group:** depending on system configuration, may default to the primary Tax Group for your store. Tax Group selection is available by using the pick list (Three bars).

**Rules:** may or may not be needed depending on system configuration. If used, these typically allow users to select specific “Same As Cash” periods. It is advisable to inquire with your management team for information on how these may be used for your company.

**Package Code:** may or may not be needed depending on system configuration. If used, these typically allow users to select specific “Package Code” descriptions. These are typically used to identify agreements that contain multiple inventory units like a “Washer & Dryer” or “Living Room Group.” It is advisable to inquire with your management team for information on how these may be used for your company.

This screenshot shows a portion of a web form. At the top, there are two dropdown menus: 'Agreement Type:' with 'Rent To Own' selected, and another dropdown. Below these are three pick list fields: 'Tax Group:' with 'TX1' selected, 'Rules:' with an empty pick list, and 'Package Code:' with an empty pick list. Each pick list has a blue box around the selection area. At the bottom left is a 'SAVE' button with a circular arrow icon, and at the bottom right is a 'MAIN MENU' button with a house icon.

When all fields are complete, click **SAVE** to continue.

This screenshot shows the 'NEW AGREEMENT ADD' form. It contains several fields: 'Customer Name:' (SMITH, JEFF), 'Account #:' (1001429), 'Agreement #:' (362020), 'Agreement Date:' (9/24/18), 'Store #:' (1), 'Customer Type:' (RENTAL), 'Agreement Terms:' (OTHER WEEKLY Cr), 'Length:' (78), 'Payment Terms:' (Weekly), and 'Agreement Type:' (Rent To Own). At the bottom, there are three pick list fields: 'Tax Group:' (TX1), 'Rules:', and 'Package Code:'. A red arrow points to the 'SAVE' button at the bottom left, which is also highlighted with a red box. A 'MAIN MENU' button is at the bottom right.

## Add Inventory

The *ADD INVENTORY* screen will open at the bottom of the *New Agreement Add* screen.

The **Serial #/Alt ID/Model** field will be highlighted. There are several options that may be used to add an inventory unit to the rental agreement.

- If using the inventory unit **Serial Number**, enter the number and press **ENTER**.
- If using the inventory unit **Alternate ID**, enter the number and click the **BY ALT ID** button.
- If using the inventory **Model Number**, enter it and click the **BY MODEL** button.
- An inventory unit may be selected from available inventory by using the **ADD ITEM** option. Additional information for this option can be found in the cynergi|suite university training videos section for inventory.

The screenshot shows the 'ADD INVENTORY' screen with the following fields and buttons:

- Payment Terms: Weekly
- Agreement Type: Rent To Own
- Tax Group: TX1
- Rules: [Empty]
- Package Code: [Empty]
- Serial #/Alt ID/Model: [Empty] (highlighted with a blue box and a red arrow)
- Buttons: BY ALT ID, BY MODEL, ADD ITEM (all highlighted with red boxes)
- Table headers: SN #, Model #, Desc, Payment Amt, ESP, CSP/FMV, Delete
- Buttons: SAVE, BACK, MAIN MENU

The inventory unit selected for the rental agreement will appear at the bottom of the screen.

- Additional inventory units may be added by repeating the steps described above.
- The inventory may be deleted if necessary by clicking on the **Delete** icon.

Click **SAVE** to continue when finished with adding all needed inventory units.

The screenshot shows the 'ADD INVENTORY' screen with the following table and buttons:

SN #	Model #	Desc	Payment Amt	ESP	CSP/FMV	Delete
BRMRH0N126	TKLGE5UJ6300	55" 4K TV	29.99		1169.63	[Delete icon]

Buttons: SAVE (highlighted with a red box), BACK, MAIN MENU

After clicking **SAVE**, you will have the option to return to the previous screen to make inventory selection changes by clicking **YES**. If no changes are needed, then click **NO** to continue.

The screenshot shows the 'ATTENTION!' dialog box with the following text and buttons:

ATTENTION!  
AnyChanges?

Buttons: YES, NO (YES is highlighted with a red box)

The final screen of the rental agreement creation will have several blocks of information and options.

## Recurring Payment Details

RECURRING PAYMENT DETAILS will show the following information:

**Rate of Pmt:** shows the rental rate of the agreement based on the payment mode selected from the New Agreement Add screen. If the rental rate “Rate of Payment” needs to be changed when creating the agreement, it should be done on this screen.

**Rate of GRP:** Guaranteed Replacement Plan, Guaranteed Replacement Policy, or Loss Damage Waiver Policy (may or may not be used depending on system configuration).

**Rate of ESP:** the Extended Service Plan amount (may or may not be used depending on system configuration).

**Rate of Tax:** the tax rate of the tax group assigned to the rental agreement.

**Tot Reg Due:** the amount of the total payment based on payment mode including all fees and taxes.

**Nxt Pmt Due:** two options are available

- 1) The initial payment may be processed at the same time the agreement is filed (if processing the initial payment during the agreement creation, input the date the initial payment will pay to)
- 2) The agreement may be filed and the first payment then taken in the rental payment screen (if NOT processing the initial payment during the agreement creation, leave this field blank)

**Agmnt Bal:** the rental agreement balance based on the payment mode previously selected on the “New Agreement Add” screen *Agreement and Payment Terms*.

**Balloon Pmt Amt:** may or may not be used depending on system configuration (this is typically a state specific requirement).

## Initial Payment Details

If processing the initial payment during the agreement creation (a “Nxt Pmt Due” date was entered), then the initial payment amounts will be displayed in the following fields.

If NOT processing the initial payment during the agreement creation, the “1<sup>st</sup> Payment Amt” should be blank and the remaining fields may be populated (the amounts may need to be forgiven or carried back).

**Delivery/Installment Amt:** displays Delivery and Installment fees, if applicable.

**1<sup>st</sup> Payment Amt:** initial 1st payment amount previously set on the recurring payment details (if taking initial payment).

**GRP/ESP:** displays the Waiver and Extended Service Plan fees, if applicable.

**Deposit Amt:** if a deposit is to be taken, it can be entered here.

**Proc/Recycle Amt:** Processing and Recycle fees, if applicable.

*Please Note: If necessary, these amounts may be overridden with proper security clearance.*

### Tendered Payment Details

#### If processing the initial payment during the agreement creation

**Pmt 1:** select the payment form from the pick list and enter the amount tendered in the second field.

If the amount tendered is more than the amount shown, you will be prompted to select one of two options: **CALCULATE CHANGE** or **CREDIT RECEIVABLES**

Either calculate the change due to the customer or apply the overpayment to the customer (credit will be owed to customer).

**Pmt 2:** available if a split payment form is needed.

#### If NOT processing the initial payment during the agreement creation:

**Pmt 1:** blank; no further action is necessary in this section.

### Agreement Terms Details

**Monthly Pmt Amt/Terms:** displays the monthly rental rate and monthly rental term

**Cash Sell Price:** also referred to as "Cash Price," "Fair Market Value," and "Same As Cash"

*Depending on system configuration, these fields can be overridden with proper security clearance.*

## Delivery Details

**Delivery Date:** default is today's date, but this can be changed if needed

**Delivery Notes:** allows entry of up to three "Notes," if needed

AMT RECEIVED: 21.83      CALL NXT PMT DUE FROM AMT RECEIVED      Change Amt: 0.00

Customer has a receivable of: 3.50-

**AGREEMENT TERMS DETAILS**

Monthly Pmt Amt/Terms: 119.99 18

Cash Sell Price: 1,169.61

**DELIVERY DETAILS**

Delivery Date: 9/24/18

Delivery Notes: +

## Sales Details

**Salesmen:** select the employee(s) that will be credited with the sale

**Acct Manager:** defaults to the Route to which the customer is assigned

**Source:** the "Advertising" source that brought the customer into the store. Use the pick list to select the appropriate advertising source code.

Click **SAVE** to continue

**SALES DETAILS**

Salesmen: 1048-WARD KURT

Acct Manager: 1-ROUTE 1

Source: CURRENT CUST

**INVENTORY ON AGREEMENT**

SN #	Model #	Desc	Payment Amt	ESP	CSRFMV
8RMRH0N126	TKLGE55UJE300	55" 4K TV	29.99	1169.61	

SAVE      BACK      MAIN MENU

At the following prompt, click **NO** to continue (**YES** will return to the previous screen).

**ATTENTION!**

AnyChanges?

YES      NO

Depending on system configuration, you may receive a prompt for an *EXCEPTION COMMENT*. This could be due to changes or overrides to rental rates and/or terms.

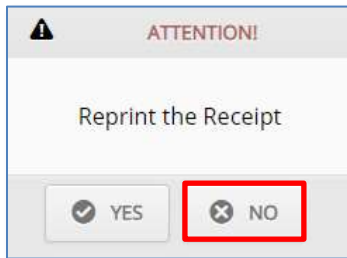
If you are required to type in a comment, enter the information and click **OK** to continue.

**EXCEPTION COMMENT**

Comment: NEW CUST PROMO REDUCED TERM

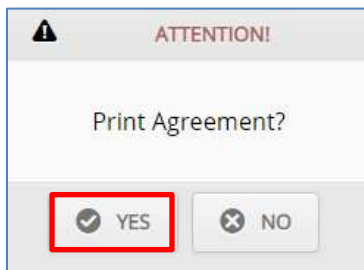
OK

The initial receipt will print. You will receive a prompt allowing the option to reprint the receipt. Click **NO** to continue.

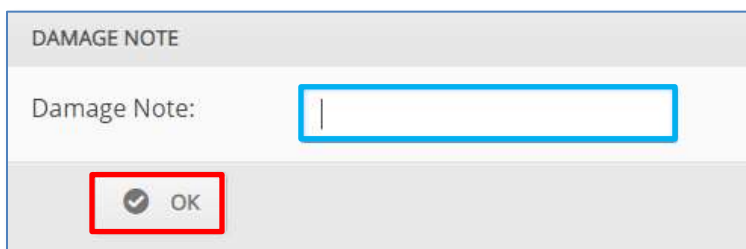


The next prompt will allow printing of the rental agreement. The Rental Agreement may be printed at this time by clicking **YES**. If the agreement is not needed at this time, click **NO**. The agreement will not be printed and can be reprinted when needed.

*Please Note: At this point, the Rental Agreement will be created regardless of printing or not printing.*



Depending on system configuration, you may receive a prompt for a *DAMAGE NOTE*. Notes may be entered to describe imperfections of the inventory items placed on the rental agreement. This is typically not a required field. Click **OK** to continue.



The Rental Agreement will print, and the screen will return to the *Customer Search* screen to allow additional rental agreements to be created.

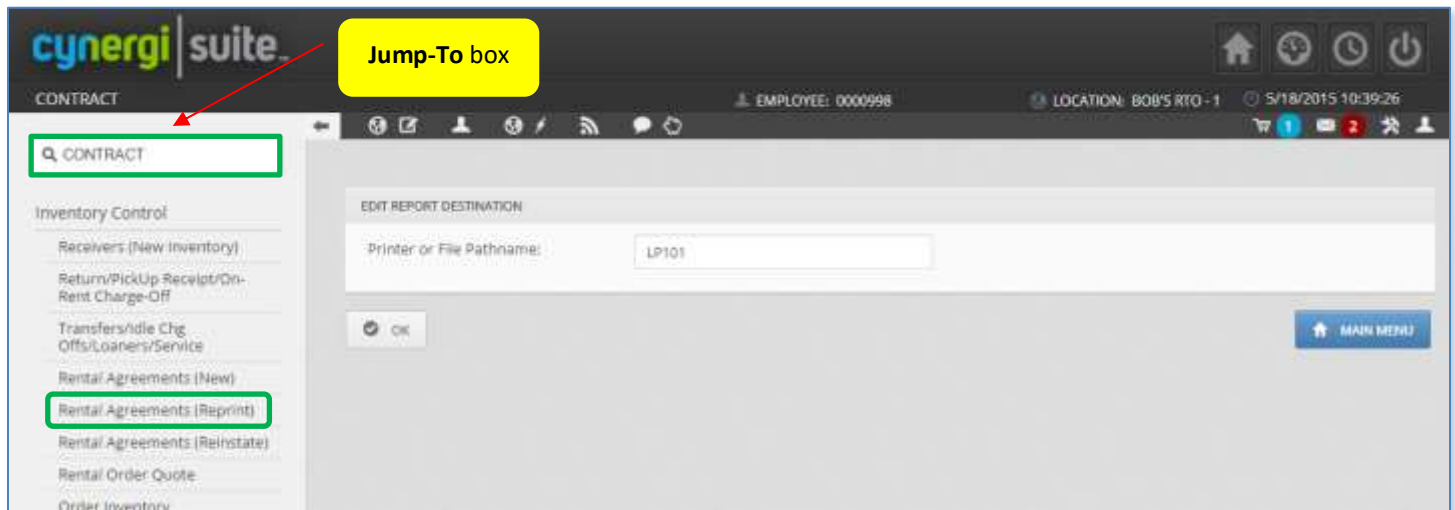
To leave NEWIND (Rental Agreement Add) click on the **MAIN MENU** button.



## Reprint a Rental Agreement

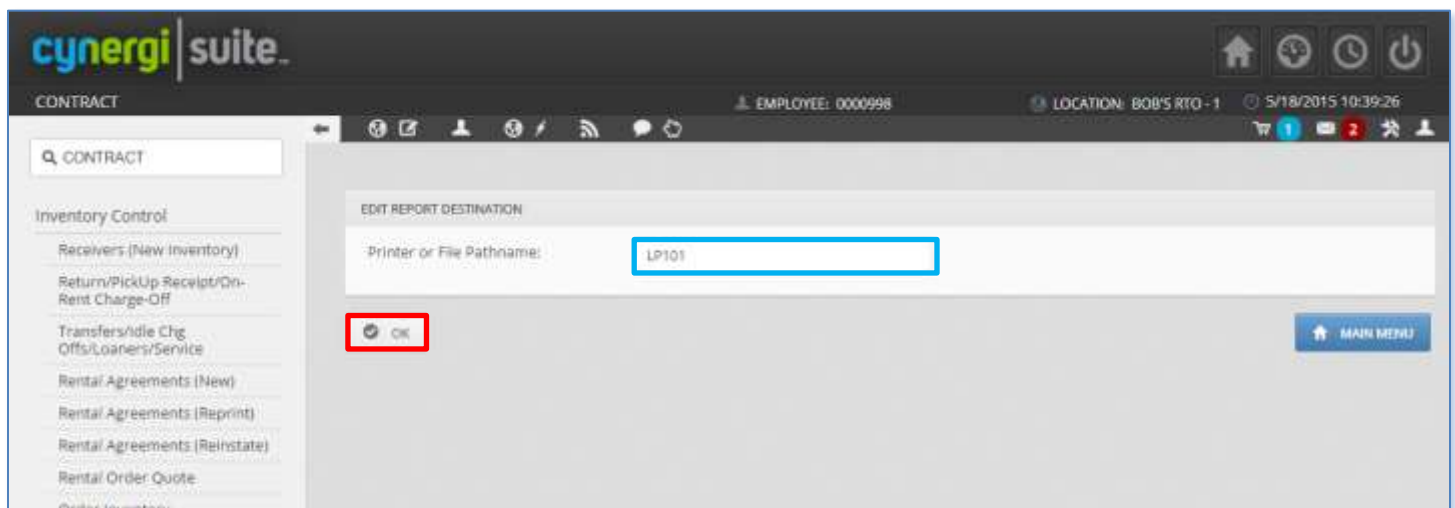
To reprint a Rental Agreement, type **CONTRACT** into the **Jump-To** box and press the **TAB** or **ENTER** key. You may also select it from your company's cynergi|suite menu.

*Please Note:* Your menu option may be different than what is shown below.



The first prompt will be the **Printer or File Pathname**. The correct printer name should be the default. However, if it is not, simply enter the printer name you would like to use.

Once you have verified the correct printer name, click the **OK** button to continue.



Enter the customer's name into the **Last Name** and **First Name** fields and click **OK** to continue.

*Please Note:* The Store selection defaults to the store you are logged into. You may need to change it to **Store 0** if you need a broader search.

PRINT RENTAL AGREEMENT

Store: 1 Last Name or Cust Acct #: SMITH First Name: DAVID

OK MAIN MENU

The *Customer Search* results will then be displayed below. Click anywhere on the line displaying the *Customer Name* for whom you would like to reprint the agreement.

PRINT RENTAL AGREEMENT

Store: 1 Last Name or Cust Acct #: SMITH First Name: DAVID

RESULTS:

Account	Name	Address	City	State/Province
1008798	SMITH DAVID	1234 MAIN ST.	ANYTOWN	TX
1002105	SOREL EDMOND	3404 W LAMBRIGHT	ANYTOWN	TX
1008625	ST CLAIR FRANZ	8653 WHITE SWAN	ANYTOWN	TX
1006992	STEVENS SHARNET	3417 E. COMANCHE	ANYTOWN	TX
1004039	TEMPLEMAN RICHARD	5636 COLUMBIA DR	ANYTOWN	TX
1008834	THOMPSON BRENDA	1234	WICHITA	KS
1008837	THOMPSON MINNIE	789	ANYTOWN	KS
1008836	THOMPSON STEVE	1234	ANYTOWN	KS
1008762	TRAVIESO YAITZA	8415 N ARMENIA 1	ANYTOWN	TX
1006987	TRIANA VENESSA	14905 OTTO RD	ANYTOWN	TX

Showing 1 to 10 of 15 entries

1 2 Next Last

BACK

If you have selected the correct customer click **YES** to continue. Clicking **NO** will take you back to the *Customer Search*.

PRINT RENTAL AGREEMENT

Store: 1 Account: 1008798 Address: 1234 MAIN ST. City: ANYTOWN TX 55555

Customer Name: SMITH DAVID Home Phone: (123)456-7890 Work Phone: (987)654-3210

Comment:

Report:

RESULTS

Ticket	Sequence	Description	Balance	Payment Amount	Other	Late	GRF	Tax	Total Due	Due Date
1034490	0	TV LCD 32"	251.18	17.34			2.24	1.26	21.48	12/25/13

ATTENTION

Right Cust?

YES NO

At the *Print Rental Agreement* screen, the *Report Type* will default to **Contract** for reprinting agreements.

The customer's agreements will be displayed at the bottom of the screen. Click anywhere on the line displaying the agreement that you would like to reprint.

**PRINT RENTAL AGREEMENT**

Store: 1 Customer Name: SMITH DAVID  
 Account: 1008798 Home Phone: (123)456-7890  
 Address: 1234 MAIN ST. Work Phone: (098)765-4321  
 City: ANYTOWN TX 55555

Comment:

Report: **Contract**

RESULTS											
Ticket	Sequence	Description	Balance	Payment Amount	Other	Late	GRP	Tax	Total Due	Due Date	
1034490	0	TV LCD 32	251.16	17.94			2.24	1.26	21.44	12/25/13	

← BACK

The *Rental Agreement* will print.

- The agreement will be an exact copy of the original agreement with the exception of the date. The current date will print in place of the original date.
- All additional addendum forms that print with the original agreement will also be reprinted.

## Change Customer Type by Agreement

Users have the ability to change the **Customer Type** from the **Rental Payment (RP)** screen. The **Customer Type** can be changed at the agreement level, not the customer level. A button has been added to the **Details/Bad Checks** screen that allows the agreement **Customer Type** to be changed. One benefit of this update is that users have the ability to have different **Customer Types** for different agreements.

From the RP screen, click on the **Details/Bad Checks** icon.

AGREEMENTS													
Terms	# of Payments	Agreement	Balance	Pmts Left	Curr Due	Next Due	Dt /Amt	Pmt Ext	Pmt Amt	Late Fees	Misc Fees	Tax	Total Due
W	1 x 3.50	Club Fee	172.00		9/28/19	10/05/19			3.50		0.00	0.25	3.75
W	1 x 6.99	DESK	433.38	62	9/28/19	10/05/19			6.99		1.00	0.56	8.55

Length 0 Terms: W FEE      Promo: Pmts: Promo Days: 0      Total Charge: 12.30      Receivable: 0.00      Due: 12.30

Click the **CHG CUST TYPE** button at the bottom of the **Agreement Details** screen.

AGREEMENT DETAILS							
Remaining Bal:	9,652.00	Beginning Bal:	14,478.00	Customer Typ:	R	Curr Due Date:	10/15/19
Store/Rules:	2 / 6025	Agreement Dt:	1/25/18	Pay Freq:	M	Rental Pmt:	241.30
Account Mgr:	25	Agreement/Seq:	400477	Deposit:	0.00	GRP/LDW:	0.00
# Bad Checks:		Alternate #:		Delivery:		ESP Amount:	
# Times Late:	7	Salesperson:	161	Tax Amt:	18.10		
Tax Group:	430	Clerk:	161	Last Paid:	9/23/19	Total Reg Pmt:	259.40
Package Code:							
Total Due:	261.21	Last Due:	9/15/19	Agreement Typ:	B		
Late Receivables:	0.00	Last Changed:	9/23/19	Adv Code:	CC		

INVENTORY ON AGREEMENT							
Model	Serial	Alt ID	Description	Payment	ESP	Date	
LBDRSLB1230	SLB102888	400199	LOFTED BARN	241.30		1/25/18	

Showing 1 to 1 of 1 entries

AGREEMENT BALANCE			
Weekly Payment/Beginning Balance:	0.00	0.00	
M Monthly Payment/Beginning Balance:	241.30	14478.00	

RETURN BAD CHECK	PAY BAD CHECK	<b>CHG CUST TYPE</b>	FEES	← BACK	MAIN MENU
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The **Pick Default Customer Type** screen will display with a list of types. Select the **Description** for the desired **Customer Type**.

PICK DEFAULT CUSTOMER TYPE	
Code	Description
R	RENTAL
O	REPO/CR-PU
L	LEGAL
E	DECEASED
P	NO CALLS
N	NO LETTERS
I	INVESTIGATE/OSV
W	WORK ORDER
S	SMALL BALANCE
X	NO CONTACT
B	BANKRUPT
A	ATTORNEY
J	JUDGMENT
Y	PICKUP-ATTY-B
T	TRANSFER
C	CANCEL

Navigation buttons: >> << ← BACK

The **Code** for the selected **Customer Type** will replace the previous code in the **Customer Type** field.

AGREEMENT DETAILS							
Remaining Bal:	9,652.00	Beginning Bal:	14,478.00	Customer Typ:	E	Curr Due Date:	10/15/19
Store/Rules:	2 / 6025	Agreement Dt:	1/25/18	Pay Freq:	M	Rental Pmt:	241.30
Account Mgr:	25	Agreement/Seq:	400477	Deposit:	0.00	GRP/LDW:	0.00
# Bad Checks:		Alternate #:		Delivery:		ESP Amount:	
# Times Late:	7	Salesperson:	161	Tax Amt:	18.10		
Tax Group:	430	Clerk:	161	Last Paid:	9/23/19	Total Reg Pmt:	259.40

## Add a Club Agreement

There are two typical methods used to create Club Agreements:

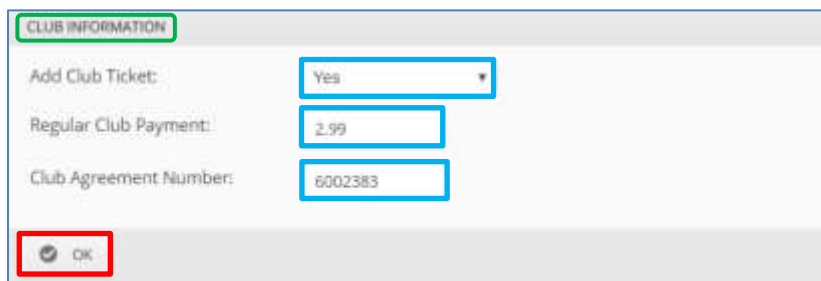
- Automatic creation at time of rental agreement
- Manual creation

### Add Club Agreement When Creating a Rental Agreement

When Club is offered, the system is typically configured to display the *CLUB INFORMATION* prompt asking the user if they would like to add a Club Agreement/Ticket. When a new rental agreement is created, the prompt will appear immediately after the inventory has been selected and saved. Customers may only have one club agreement, so this *CLUB INFORMATION* prompt will not appear if the customer already has a club agreement.

- The Club amount and agreement number will automatically populate.
- The prompt will display for a customer that does not already have an open club agreement, if the customer already has Club the prompt will not appear.
- To add the Club Agreement, leave the default set to “Yes.”
- To decline the Club Agreement, change the default to “No.”

Click **OK** to continue



The screenshot shows a dialog box titled "CLUB INFORMATION". It contains three fields: "Add Club Ticket:" with a dropdown menu set to "Yes", "Regular Club Payment:" with a text box containing "2.99", and "Club Agreement Number:" with a text box containing "6002383". At the bottom left, there is an "OK" button with a circular icon to its left, which is highlighted with a red box.

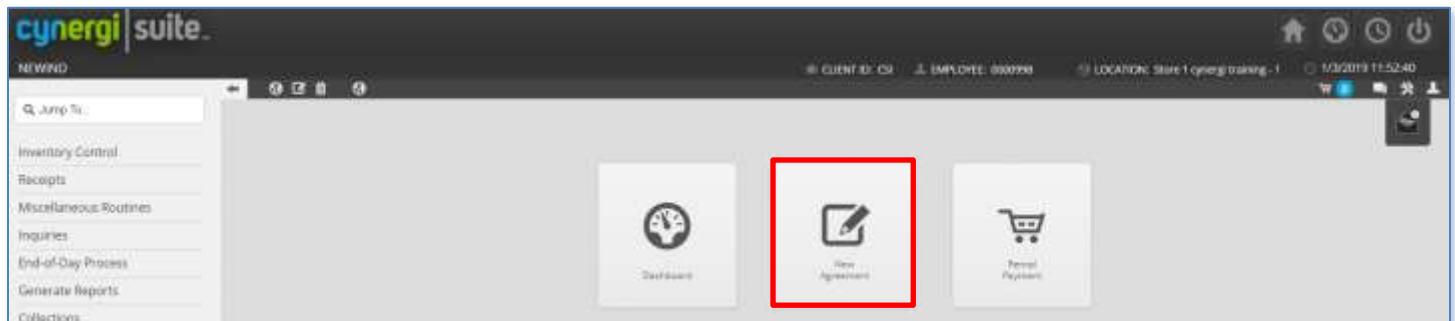
The Club Agreement will print along with the Rental Agreement and associated forms.

### Add Club Agreement Manual Process

A Club Agreement can be added manually by using the same process used for creating rental agreements.

Begin by following the same steps used to create a new rental agreement.

Click **New Agreement**.



Input the customer's name in the *Customer Search*.

Select the customer from the search results list by clicking anywhere on the customer information line.

CLIENT ID: CSJ | EMPLOYEE: 0000998 | LOCATION: Store 1 cynergi training - 1 | 1/3/2019 11:55:42

CUSTOMER SEARCH

Search For: Name \* JONES AARON | Store: 1-Store 1 cynergi training | SEARCH

\*\* ONLY GROUP FOR YOUR PARAMETERS \*\*

Store	Account	Last Name	First Name	Address	City	License
1	5002992	JONES	AARON	7755 S SUMMIT FE	ANYTOWN	

Showing 1 of 1 items

ADD CUSTOMER | PREVIOUS | NEXT | MAIN MENU

The customer information screen will open, allowing for updates as needed.

Click **SAVE** at the bottom left to continue.

SAVE | VERIFY | COMMENT | BACK | MAIN MENU

Any More Changes?

Click **NO** to continue.

ATTENTION!

Any More Changes?

YES | NO

The standard *New Agreement Add* screen will open

- Select the Agreement Terms (Other Weekly or Monthly) as needed. **Length will not need to be set.**
- Select the Payment Terms as needed.
- Set the Agreement Type to **Fee Ticket**, and then set the Type to **Club**.

Click **SAVE** to continue.

NEW AGREEMENT ADD

Customer Name: JONES AARON | Account #: 5002992

Agreement #: 362941 | Agreement Date: 1/03/19 | Store #: 1

Customer Type: RENTAL | Length:

Agreement Terms: OTHER WEEKLY C | Payment Terms: Weekly

Agreement Type: Fee Ticket | Type: Club

Tax Group: TX1 | Rules: | Package Code:

SAVE | NOTES | MAIN MENU

Input the rate of payment for the club agreement in the *Recurring Payment Details* screen.

- If weekly, input the weekly amount.
- If monthly, input the monthly amount.

Continue through the remaining steps used when creating a rental agreement to complete the process.

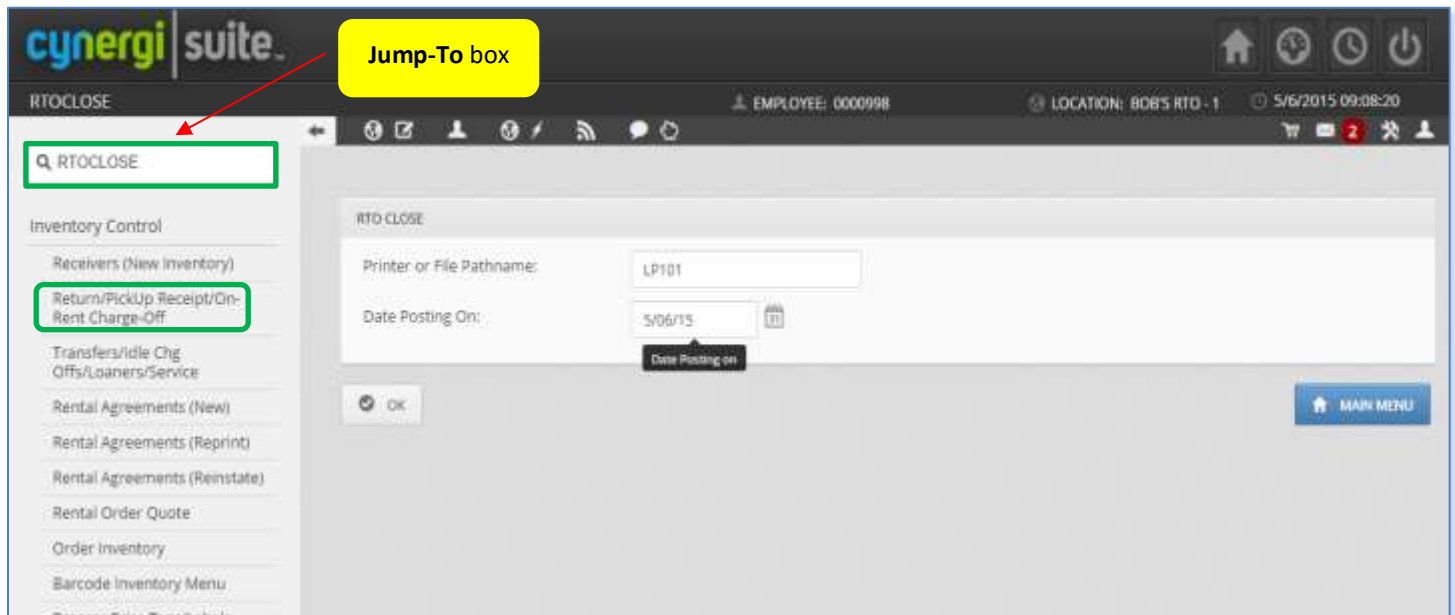
Fill out the *Sales Details*, then click **SAVE**.

Follow the remaining prompts to print the Club Agreement form.

## Close (Return/Pickup) a Rental Agreement

To close out (Return or Pickup) a Rental Agreement, type **RTOCLOSE** into the **Jump-To** box and press the **TAB** or **ENTER** key. You may also select it from your company's cynergi|suite menu.

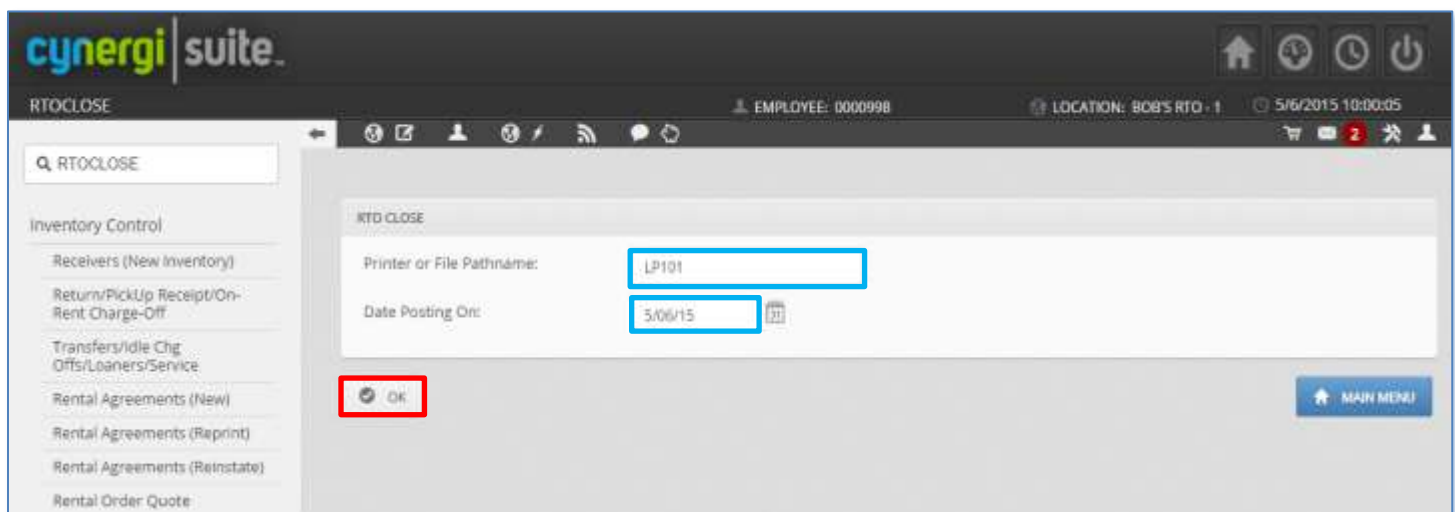
*Please Note:* Your menu option may be different than what is shown below.



The first prompt will be the **Printer or File Pathname**. The correct printer name should be the default. However, if it is not, simply enter the printer name you would like to use. The second prompt will be the **Date Posting On**, which will default to the current date.

*Please Note:* You may or may not be able to change this date due to your security settings.

Once you have the two fields set correctly, click the **OK** button to continue.



Enter the customer's name in the *Customer Search* screen and click the **SEARCH** button to continue.

The *Customer Search* results will be shown below. Click anywhere on the line displaying the customer's name for which you would like to process the *Agreement Close*.

Store	Account	Last Name	First Name	Address	City	License
1	1007958	SHARP	DELONZO	1307 127TH AVE A	ANYTOWN	
1	1008798	SMITH	DAVID	1234 MAIN ST.	ANYTOWN	

The customer's active rental agreements will be displayed. Click on the line showing the agreement you wish to close. It may be helpful to locate the agreement by using the **Ticket** (Agreement #) or the **Description**.

Account	Ticket	Agreement Date	Description	Ship To
1008798	1008798	10/03/12	CLUB FEE	0
1008798	1034490	10/03/12	TV LCD 32	0

To Close/Return the rental agreement, click the **CLOSE TICKET** button at the bottom of the screen. The **BACK** button will return to the agreement selection.

CLOSE RTO TICKETS - SPIFF

Last Name:	SMITH	First Name:	DAVID
Store:	1	Acct#:	1008798
Ticket#:	1034490	Rate Of Payment:	17.94
Rate Of GRP:	2.24	Rate Of ESP:	0.00
Rate Of Tax:	1.26	Total Regular Due:	21.44
Next Payment Due:	2/06/13	Agreement Amount:	1,399.32
Agreement Balance:	1,076.40	# BOR Items:	
Payment Terms:	W	Agreement Type:	78 WEEKS
		Balloon Payment:	0.00

Model #	Serial #	Payment Amount	Spiff	Agreement Date	Agreement Balance
EBRCAL32WD14	G182E1445	17.94		10/03/12	1076.40

SAVE   
  **CLOSE TICKET**   

You will be prompted to choose a *Reason For Closing*. Click in the box to display a pick list of closing reasons.

CLOSING REASON

Reason For Closing:

Closed Date: 5/06/15

Click the "Reason For Closing" you wish to use.

**Please Note:** When closing an agreement as a **Return (Pickup)**, you will select the **Return** option. Some closing selections may require additional security clearance.

CLOSING REASON

Reason For Closing:

Closed Date:

- 1 Return
- 2 Payout
- 6 Skip
- 7 Stolen
- 8 Chargeoff
- 9 Early Buyout

A second tier of more specific **Return Reasons** will display. Click on the reason that best applies.

CHOOSE RETURN REASON		
Code	Type	Reason
RC	Refund and Cancel	REFUND & CANCEL
RE	Repossess	REPOSSESS
RP	Request Pickup	REQUEST PICKUP
TC	Refund and Cancel	TICKET CHANGE

Navigation: >> << BACK

*Please Note: The **Refund and Cancel** option will close the agreement, return the inventory to its previous status, and refund the initial payment, if the return is done on the same day the rental agreement was created. This option may require specific security clearance.*

Click **OK** to continue.

CLOSING REASON	
Reason For Closing:	1 Return
Closed Date:	5/06/15
<input checked="" type="checkbox"/> OK <span style="float: right;">← BACK</span>	

The agreement closing process offers the option to post a payment and/or fees to the agreement just before closing.

- To post a payment or fees, fill in any of the fields below, including the tender type, and click **SAVE**.
- If you do not wish to post a payment or fees, leave the fields blank and click **SAVE**.

CLOSE TO TICKETS - PAYMENT																					
Last Name:	SMITH		First Name:	DAVID																	
Store:	1		Acct#:	1006798																	
Ticket#:	1034490		Delivery/Installation:																		
Payment Amount:			GRP Amount:																		
ESP Amount:			Deposit Amt:																		
Proc Fee:			Recycle Fee:																		
Tax Amount:			Total Due:	0.00																	
Next Payment:	2/06/13		Amt Received:			1 - CASH															
			Change Due:	0.00																	
<table border="1"> <thead> <tr> <th>Model #</th> <th>Code</th> <th>Serial #</th> <th>Payment Amount</th> <th>Spill</th> <th>Agreement Date</th> <th>Agreement Balance</th> </tr> </thead> <tbody> <tr> <td>EBR132WD14</td> <td></td> <td>G182E1445</td> <td>17.94</td> <td>0.00</td> <td>10/03/12</td> <td>1076.40</td> </tr> </tbody> </table>								Model #	Code	Serial #	Payment Amount	Spill	Agreement Date	Agreement Balance	EBR132WD14		G182E1445	17.94	0.00	10/03/12	1076.40
Model #	Code	Serial #	Payment Amount	Spill	Agreement Date	Agreement Balance															
EBR132WD14		G182E1445	17.94	0.00	10/03/12	1076.40															
<input checked="" type="checkbox"/> SAVE <span style="float: right;">← BACK</span>																					

The final *Inventory Condition/Returned Status* step will offer two selections.

- Enter an **Inventory Condition** in the free text field. *Example: GOOD, FAIR, POOR.* Adding the *Inventory Condition* text is not required and can be left blank. Unless a condition needs added, no action is required.
- The **Returned Inv Status** expects an Inventory Status.
  - **R – Re-Rental/Previously Rented:** This option is the default that appears and is the most common selection. Unless the selection needs to change from **R**, no action is required.
  - **N – New:** This option can be selected with proper security clearance.

Click **OK** to continue the closing process.

If changes are needed, click **YES** to go back. Otherwise, select **NO** to continue.

If a Club Agreement exists, the final step will prompt if you would like to close the customer’s Club Agreement. Select the option that applies.

- Click **YES** to close the customer’s Club Agreement.
- Click **NO** to leave the Club Agreement active.

## Close a Club Agreement

Cynergi|suite club agreements can be closed in the following areas:

- During a Payout or Early Payout (EPO) of a rental agreement
- When processing a Return/Close or a rental agreement
- Manually closing the Club Agreement when needed through the *Rental Payment (RP)* screen

### Closing a Club Agreement during Payout, EPO or Return/Close Process

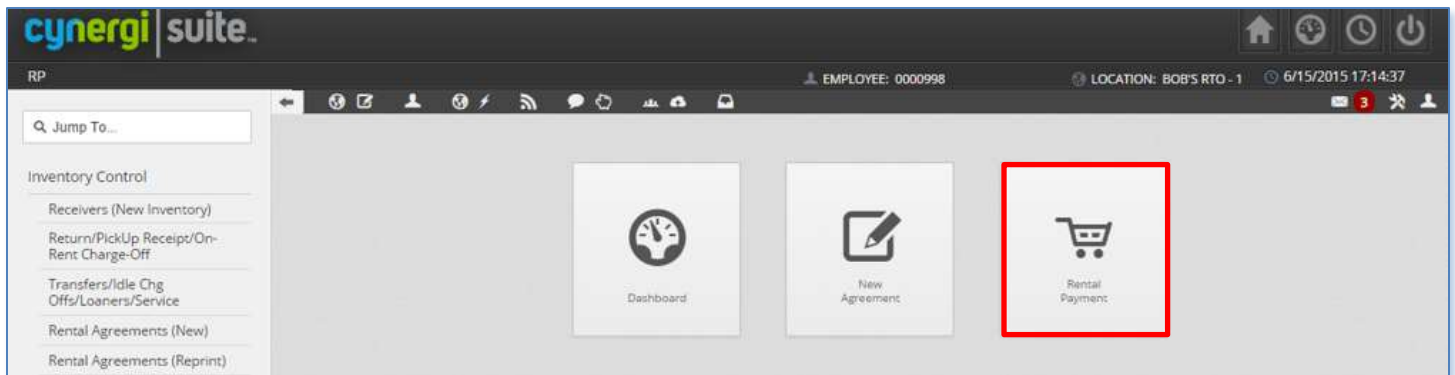
When processing a Payout, Early Payout (EPO), or Return of a rental agreement, the following prompt will display as the final step if the customer has an active Club Agreement:

- **YES:** Will close the Club Agreement (even if the customer has other active rental agreements)
- **NO:** Will leave the Club Agreement active



### Closing a Club Agreement Manually

A Club Agreement can be closed manually by following these steps:  
Click on the **Rental Payment** icon.



Enter the customer's name  
Click **SEARCH** to continue.



To select the customer, click anywhere on the line displaying the customer information.

CUSTOMER SEARCH

Search For: Name ▼ KELLY JIM Store: 1-BOB'S RTO SEARCH

\*\* ONLY GROUP FOR YOUR PARAMETERS \*\*

Store	Account	Last Name	First Name	Address	City	License
1	1008802	KELLY	JIM	12343 MAIN ST	BETHESDA	0987654321

Showing 1 to 1 of 1 entries

ADD CUSTOMER PREVIOUS NEXT MAIN MENU

Locate the **Club Fee** agreement line and click on the **Payoff** icon (Piggy Bank).

AGREEMENTS

Terms	# of Payments	Agreement	Balance	Pmts Left	Curr Due	Next Due	Dt /Armt	Pmt Ext	Pmt Amt	Late Fees	Misc Fees	Tax	Total Due
W	2.00	Club Fee	4.00	6/29/15	7/06/15				2.00		0.00	0.00	2.00
W	11.99	DRYER FU	495.02	42	6/27/15	7/04/15			11.99		0.00	0.84	12.83

Length 0 Terms: W FEE Total Charge: 14.83 Receivable: 0.00 Due: 14.83

CUSTOMER CHANGE Total Payment Amount Due BACK TENDER

Click the **CLOSE FEE AGREEMENT** button to close the **Club Agreement**.

FEE TICKET AMOUNTS

For: JIM KELLY Ticket: 1034785 6/15/15

Number of Payments Already Made: 2.0000

Amount Already Paid: 4.00

CLOSE FEE AGREEMENT BACK

Upon successfully closing the **Club Agreement**, it will no longer appear in the customer's **Rental Payment** screen.

AGREEMENTS

Terms	# of Payments	Agreement	Balance	Pmts Left	Curr Due	Next Due	Dt /Armt	Pmt Ext	Pmt Amt	Late Fees	Misc Fees	Tax	Total Due
W	11.99	DRYER FU	495.02	42	6/27/15	7/04/15			11.99		0.00	0.84	12.83

Length 43 Terms: W RTO Total Charge: 12.83 Receivable: 0.00 Due: 12.83

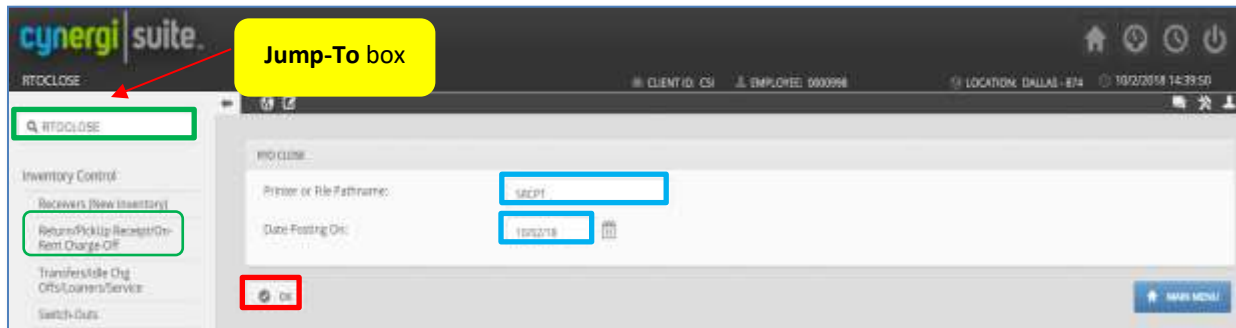
CUSTOMER CHANGE BACK TENDER

## Print a Pick-Up Receipt

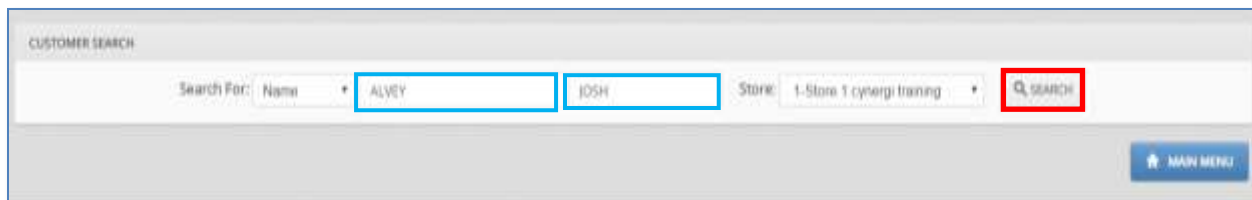
Go to the Inventory Control Menu and choose **Return/Pickup**. You can also access the program by typing **RTOCLOSE** in the **Jump-To** box.

*Please Note: Your menu option may be different than what is shown below.*

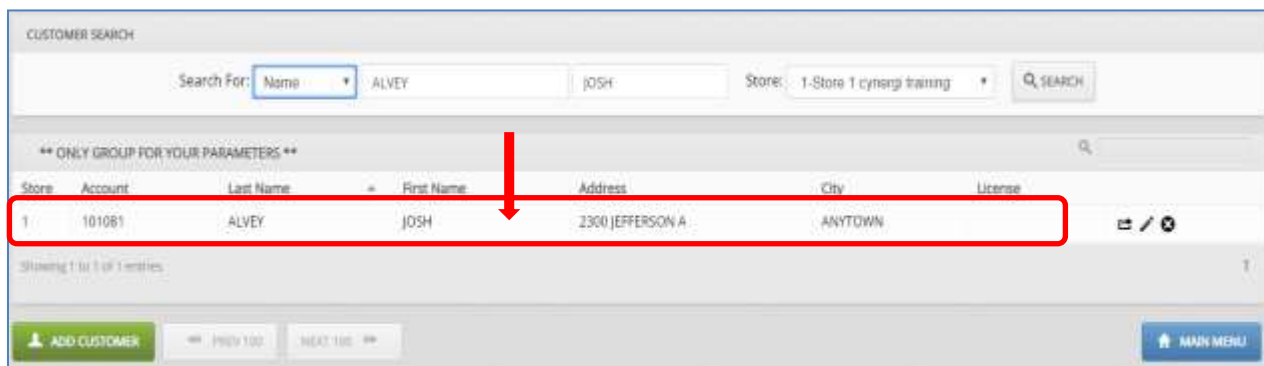
Check to make sure you have the correct printer and date set, then click **OK**.



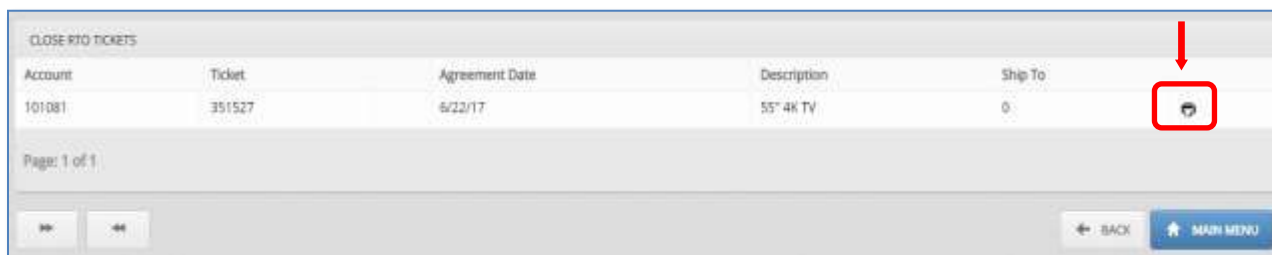
Enter the customer's name for which you want to generate a Pick-Up Receipt. Click **SEARCH** to continue.



Select your customer from the list by clicking anywhere on the customer information line.



The customer's list of active agreements will display. To print, click the **Printer** icon at the far right of the Rental Agreement for which you want to generate a Pick-Up receipt.



**Pick-Up Receipt Example**

PICK-UP RECEIPT

Today's Date: 10/02/18

Store: I cynergi training  
 ANYTOWN, TX  
 (555)555-5555

ACVEY, JUDY  
 2100 JEFFERSON APT 15  
 ANYTOWN, TX 55555  
 (555)555-5555  
 Hours: 0

Status: Return/Service/Switch-Out

Agreement #: 251527

Stock	Serial #	Model #	Description
00637529	000000270	TKL0550H031	55" 4K TV

Last Due Date: 6/18/18

Total Amount Due: 8477.76

Days Past Due: 156

Customer Signature: \_\_\_\_\_

Associate Signature: \_\_\_\_\_

Processed in System by: \_\_\_\_\_

## Special Order Processing

A “Special Order” rental agreement may be created without an inventory unit. This is typically done in a situation where a Special Order is placed for an inventory item because the item has not yet been received. A rental agreement can still be created, and the customer will be able to make payments while waiting for the Special Order item to arrive. When the item arrives and is received into inventory, the agreement will need to be updated with the serial number of the new item. The agreement update is done by using a special transfer process (**INVTRAN**).

### Creating a Special Order: Create a New Agreement

Follow the normal steps to begin adding a new rental agreement. In the *NEW AGREEMENT ADD* screen, there will be a pick list for Agreement Type, select the option for **Special Order**. Click **SAVE** to continue.

The screenshot shows the 'NEW AGREEMENT ADD' screen. The 'Agreement Type' dropdown menu is open, and 'Special Order' is highlighted in red. Other options in the menu include 'Select Option', 'Rent To Own', 'Fee Ticket', 'Rent To Rent', and 'RTR Special Order'. The 'SAVE' button is visible at the bottom left, and the 'MAIN MENU' button is at the bottom right.

At this time there will not be an inventory unit to add to the agreement. Click the **SPECIAL ORDER** button to continue.

The screenshot shows the 'NEW AGREEMENT ADD' screen with the 'ADD INVENTORY' section visible. The 'Agreement Type' is now set to 'Special Order'. The 'SPECIAL ORDER' button is highlighted in red. The 'ADD INVENTORY' section includes a table with columns for SN #, Model #, Desc, Payment Amt, ESP, CSP/FMV, and Delete. The 'Model #' column has a red arrow pointing to it. The 'SAVE' button is at the bottom left, and the 'MAIN MENU' button is at the bottom right.

Enter the first few characters of the *Model Number* of the special order item. Click **SAVE** to continue.

SPECIAL ORDER

Model Number:

Fabric:

Fabric Description:

Color:

Color Description:

**SAVE** INV ON ORDER ← BACK

In the **ITEM SEQUENCE** screen, select **Model Number** from the pick list.  
*Please Note: Description may also be selected if needed.*

SPECIAL ORDER

Model Number:

Fabric:

Fabric Description:

Color:

Color Description:

SAVE INV ON ORDER ← BACK

**ITEM SEQUENCE**

Select Item Sequence: 

- Model Number
- Description

OK ← BACK ↑ MAIN MENU

A list of *Model Numbers* will be displayed.  
 Click on the line displaying the **Model Number** of the special order item.

MODEL NUMBER

Model	Discontinued	Description 1	Description 2
ALFRIATF7000FG		WASHER FRONT LOAD	BLACK DELUXE
ALFRIFEQ332ES		DRYER FRONT LOAD	WHITE DELUXE
ALFRIFER311FS		DRYER FULL SIZE	WHITE ELEC
ALFRIFER641FS		DRYER FULL SIZE	WHITE ELEC
ALFRIFTF530FS		WASHER FRONT LOAD	DELUXE WHITE FRONT LOAD
ALFRIFW51233FS		WASHER FULL	WHITE XL CAPACITY
ALFRIFW5933FS		WASHER FULL	3 SPEED SUPR CAPACITY WHIT
ALFRIGLEQ2152EE		DRYER FRONT LOAD	BLACK DELUXE
ALFRIGLEQ2152ES		DRYER FRONT LOAD	WHITE DELUXE
ALFRIGLER1042FS		DRYER FULL SIZE	WHITE ELEC
ALFRIGLT2940FS		WASHER FRONT LOAD	WHITE DELUXE

▶ ◀ + ADD ITEM ← BACK

The *Model Number* is now populated in the *SPECIAL ORDER* screen. Click **SAVE** to continue.

The rental agreement *ADD INVENTORY* screen will display the information of the special order unit. Notice the SN# (Serial Number) displays "SPEC ORDER." Click **SAVE** to continue.

SN #	Model #	Desc	Payment Amt	ESP	CSP/FMV	Delete
SPEC ORDER	ALFRIATF7000FG	WASHER FRONT LOAD	26.99		105.26	✕

Buttons: SAVE, SPECIAL ORDER, STOCK ORDER, PACKAGE, BACK, MAIN MENU

*Please Note:* The process above can be repeated to add additional special order items onto the rental agreement.

**Continue through the remaining agreement creation process as normal.** The agreement will appear like any other agreement except the unit will not have a *Serial* or *Alt ID* number.

**Example of the Agreement Details screen through Rental Payment.** Notice the *Serial* and *Alt ID* columns are blank.

Model	Serial	Alt ID	Description	Payment	ESP	Date
			53.98AD	26.99		6/16/15

Showing 1 to 1 of 1 entries

Buttons: RETURN BAD CHECK, PAY BAD CHECK, FEES, CHANGE PAYMENT, BACK, MAIN MENU

## Updating the Agreement when the Special Order Item is Received

When the Special Order item is received and ready to be delivered, the agreement must be updated with the serial number. This is done by using the Inventory Transfer area (**INVTRAN** program).

Type **INVTRAN** into the *Jump-To* box and press the **TAB** or **ENTER** key. You may also select it from your company's cynergi|suite menu.

The first screen will display the default printer name.

- If the printer name is correct click **OK** to continue.
- If you wish to print to a different printer, enter the printer name you wish to print to.

Click **OK** to continue.

Jump-To box: INVTRAN

TRANSFER/INVENTORY RECEIPT PRINTER

Printer or File Pathname: LP101

Print Test Transfer: No

Buttons: OK, MAIN MENU

The default selection, 1. Transfer Inventory, will already be set. Using the pick list, select **4. Delivery/Pick-up Inventory Transfer**. Click **OK** to continue.

Use the pick list to set the “Old Location” and the “New Location.”

- Old Location will be the store location where the Special Order unit was received.
- New Location would be the customer’s Home Location.

Click **OK** to continue.

Enter the customer’s last name.

Click **OK** to continue.

Select the customer from the pick list.

PICK CUSTOMER	Customer Name	Account #
	BACOT ANDREW	1007601
	BADDERS LAVON	1007076
	BAERGA ELBA	1002301

After selecting the Customer, the following will appear:

- The customer's information will be populated.
- Delivery Notes may be input but are not required.

Click **OK** to continue.

INVENTORY DELIVERY/PICK UP

Old Location: 1 BOB'S RTO      New Location: 9001 CUSTOMER HOME #1      Transfer Date: 6/16/15

---

CUSTOMER INFORMATION

Customer: **BACOT ANDREW**      Customer #: **1007601**

Address: 5241 CAMBERLEA      City: ANYTOWN      State: TX      Zip: 55555

Phone: (555)555-5555

---

DELIVERY/PICKUP INFORMATION

Delivery/Pickup Date: 6/16/15

Delivery/Pickup Notes: **RECEIVED SPECIAL ORDER ITEM**

COD: No      Ticket Number:

Selling Salesman:       Selling Store:

**OK** MAIN MENU

Select the customer's agreement to update with the new special order item's *Serial Number*.

GET TICKET

Customer #	Ticket #	Seq	Date	Type	Description
1007601	1034774	0	5/21/15	O	PORTABLE BUILDIN
1007601	1034790	0	6/16/15	O	WASHER FRONT LOA

Use the pick list to select a **Selling Salesman** (required field). Click **OK** to continue.

DELIVERY/PICKUP INFORMATION

Delivery/Pickup Date: 6/16/15

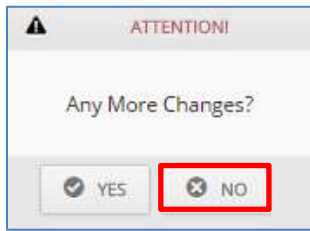
Delivery/Pickup Notes: RECEIVED SPECIAL ORDER ITEM

COD: No      Ticket Number: 1034790

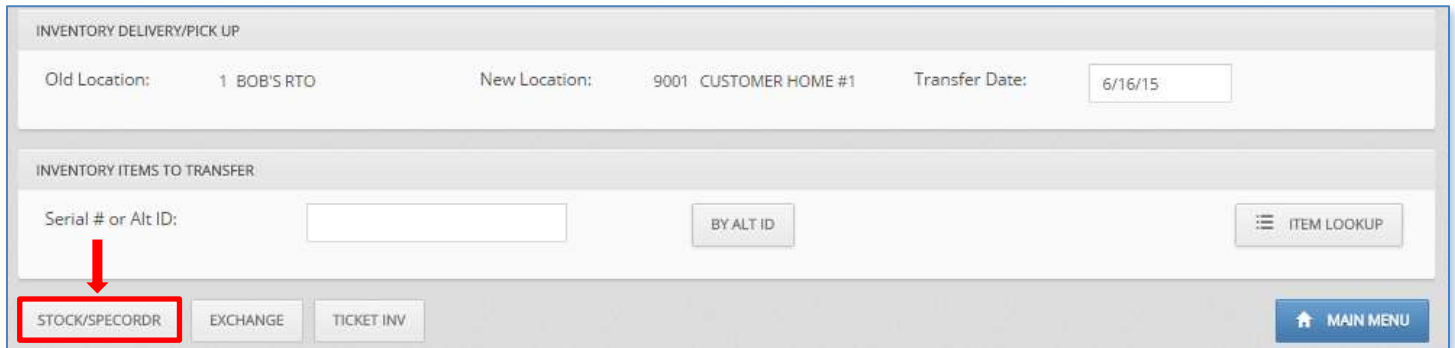
Selling Salesman: **4-BILLINGS LARRY**      Selling Store: 1 - BOB'S RTO

**OK** MAIN MENU

At the *Any Changes* prompt, click **NO** to continue. If changes are needed, click **YES** to go back.

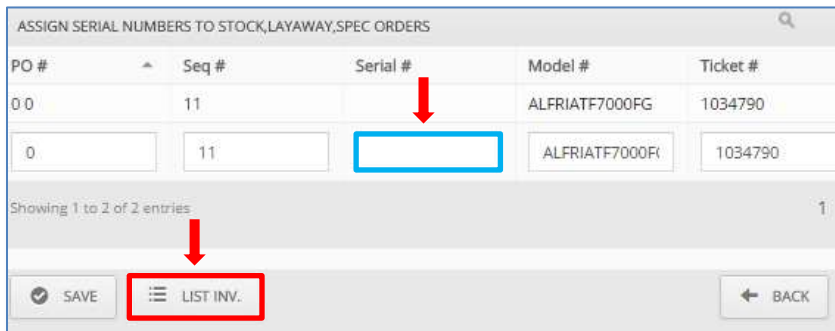


Click the **STOCK/SPECORDR** button to continue.



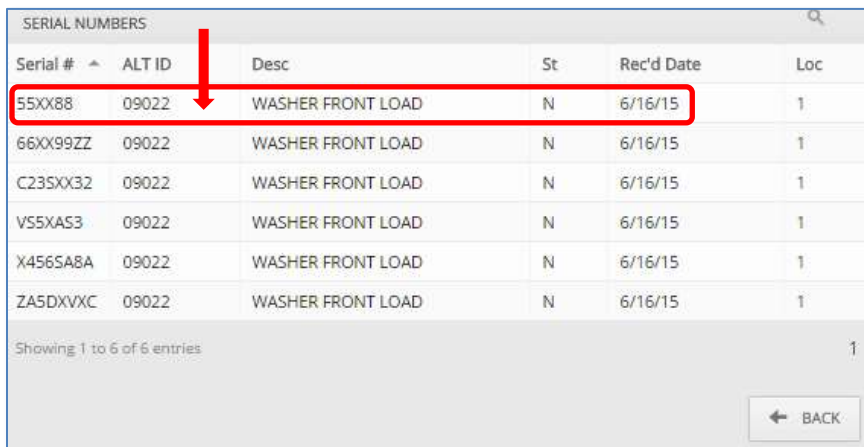
There are two methods that can be used to select the special order item:

- Enter the **Serial Number** of the special order unit.
- Click **LIST INV.** button to search for “special order” inventory.



If using the **LIST INV** option, it will display all special order inventory that has been received.

Click on the line displaying the **Special Ordered Unit** for the customer.



After the unit serial number has been entered or selected from **LIST INV**, click **SAVE** to continue.

PO #	Seq #	Serial #	Model #	Ticket #
00	11	55XX88	ALFRIATF7000FG	1034790
0	11	55XX88	ALFRIATF7000FG	1034790

Showing 1 to 2 of 2 entries

**SAVE** LIST INV BACK

The **Serial # or Alt ID** field will be populated with the unit's *Serial Number*. Press **ENTER** to continue.

Old Location: 1 BOB'S RTO New Location: 9001 CUSTOMER HOME #1 Transfer Date: 6/16/15

INVENTORY ITEMS TO TRANSFER

Serial # or Alt ID: 55XX88 BY ALT ID ITEM LOOKUP

STOCK/SPECORDR EXCHANGE TICKET INV MAIN MENU

The transfer confirmation message will appear displaying the unit *Serial Number* and *Description*. Click **YES** to confirm.

**The transfer of the special order unit from idle to on-rent**

**ATTENTION!**

Transfer Serial: 55XX88  
Description: 55XX88 WASHER  
FRONT LOAD 00100083 10

**YES** NO

The **TRANSFERS DONE** section displays the completed transfer. Click **MAIN MENU** to print the transfer receipt.

INVENTORY ITEMS TO TRANSFER

Serial # or Alt ID: BY ALT ID ITEM LOOKUP

**TRANSFERS DONE**

Serial Number	Description	Alt ID	Loc	Status
55XX88	WASHER FRONT LOAD	00100083	1	O

Showing 1 to 1 of 1 entries

STOCK/SPECORDR EXCHANGE TICKET INV MAIN MENU

The transfer/delivery receipt will print.

\*\*\*\*\* THIS IS A DELIVERY \*\*\*\*\*  
 Delivery Date: 6/16/15

Account Number: 1007601  
 Ticket Number: 1034790  
 Bill To: BACOT ANDREW

DELIVER FROM:  
 BOB'S RTO

DELIVER TO:  
 BACOT ANDREW  
 5241 CAMBERLEA  
 ANYTOWN TX 55555  
 (555) 555-5555

MODEL#/DESC/AltID	SERIAL NBR	QTY	PIECES
ALFRIATF7000FG WASHER FRONT LOAD 00100083	55XX88	1	1

Totals This Transfer: 1 1

Empl #: 998  
 Store #: 1 Slsman: 4 B  
 Delivery Notes:

Delivered By: \_\_\_\_\_  
 Received By: \_\_\_\_\_

The Special Order Process is now complete. The agreement will now display the *Serial* and *Alt ID* number of the inventory unit that was special ordered. Below is an example of the *Agreement Details* screen through *Rental Payment*.

Total Due:	33.88	Last Due:	6/16/15	Agreement Typ:	X
Late Receivables:	0.00	Last Changed:	6/16/15	Adv Code:	TV

INVENTORY ON AGREEMENT

Model	Serial	Alt ID	Description	Payment	ESP	Date
ALFRIATF7000FG	55XX88	00100083	WASHER FRONT LOAD	26.99		6/16/15

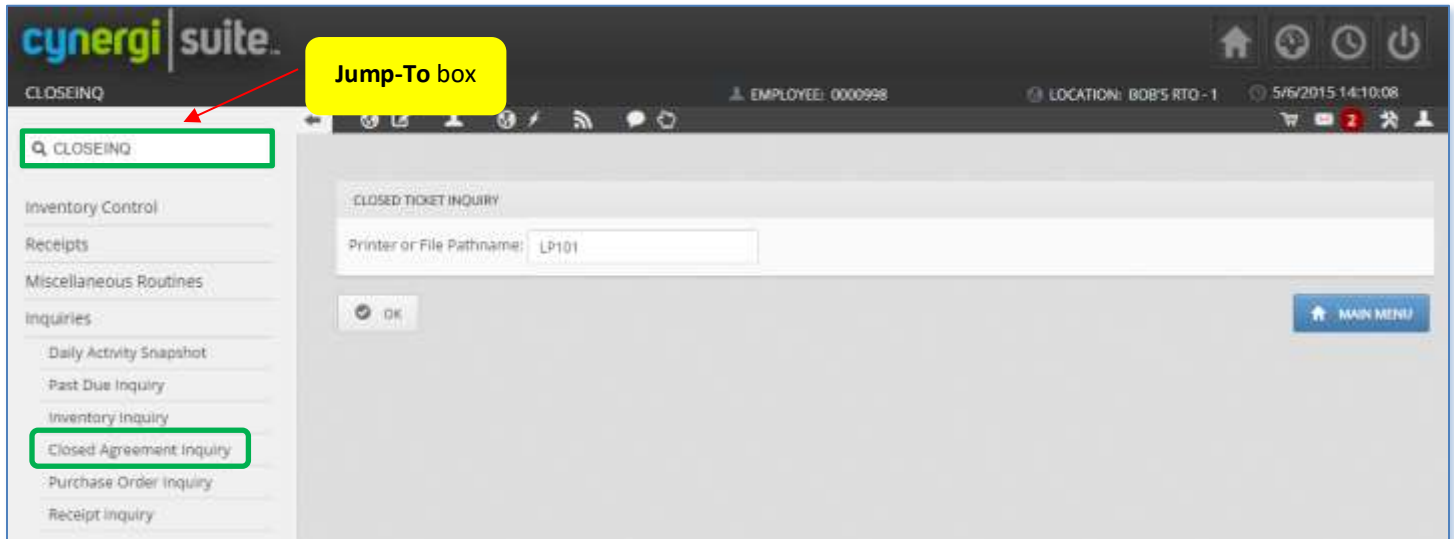
Showing 1 to 1 of 1 entries

RETURN BAD CHECK    PAY BAD CHECK    FEES    ← BACK    MAIN MENU

## View a Closed/Inactive Rental Agreement

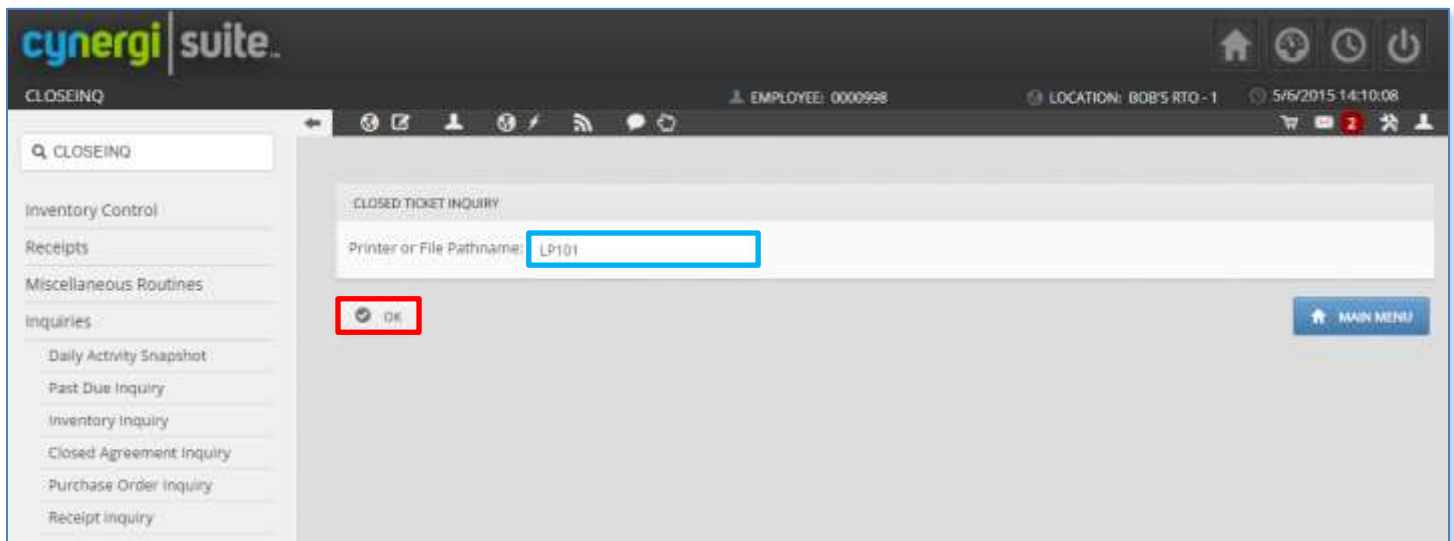
To view a Closed/Inactive Rental Agreement, type **CLOSEINQ** into the **Jump-To** box and press the **TAB** or **ENTER** key. You may also select it from your company's cynergi|suite menu.

*Please Note: Your menu option may be different than what is shown below.*



The first prompt will be the **Printer or File Pathname**. The correct printer name should be the default. However, if it is not, simply enter the printer name you would like to use.

Once you have verified the correct printer name, click the **OK** button to continue.



Enter the customer’s name into the *Customer Search* and click the **SEARCH** button to continue.

*Please Note:* If the customer does not have any active agreements, you will need to set the **Store** location to **0** to search for inactive customers.

CUSTOMER SEARCH

Search For: Name | SMITH | D | Store: 0-BOB'S RTO | **SEARCH**

\*\* ONLY GROUP FOR YOUR PARAMETERS \*\*

Store	Account	Last Name	First Name	Address	City	License	
1	1008798	SMITH	DAVID	1234 MAIN ST.	ANYTOWN		
2	1008778	SMITH	DANYALA	5157 C.P. KEEN R	ANYTOWN		
4	1008558	SMITH	DENNIS	6416 NEW YORK ST	ANYTOWN		
	1007049	SMITH/BECK	DENNIS/SHE	2625 S. 90 TH ST	ANYTOWN		

Showing 1 to 4 of 4 entries

ADD CUSTOMER | PREV 100 | NEXT 100 | MAIN MENU

The *Customer Search* results will then be displayed below. Click anywhere on the line displaying the *Customer Name* for whom you would like to inquire.

CUSTOMER SEARCH

Search For: Name | SMITH | D | Store: 0-BOB'S RTO | SEARCH

\*\* ONLY GROUP FOR YOUR PARAMETERS \*\*

Store	Account	Last Name	First Name	Address	City	License	
1	1008798	SMITH	DAVID	1234 MAIN ST.	ANYTOWN		
2	1008778	SMITH	DANYALA	5157 C.P. KEEN R	ANYTOWN		
4	1008558	SMITH	DENNIS	6416 NEW YORK ST	ANYTOWN		
	1007049	SMITH/BECK	DENNIS/SHE	2625 S. 90 TH ST	ANYTOWN		

Showing 1 to 4 of 4 entries

ADD CUSTOMER | PREV 100 | NEXT 100 | MAIN MENU

The customer's **Closed/Inactive Rental Agreements** will be displayed.

CLOSED TICKET INQUIRY							
Account	Ticket	Seq	Closed	Closed Rsn	Desc	Amt Due	
1008798	1008798	0	5/06/15	PAYOUT SATISFAC	FEE ACCT	0.00	... 🔍 🖨
1008798	1034490	0	5/06/15	REQUEST PICKUP	TV LCD 32	1076.40	... 🔍 🖨

Navigation: >> << BACK MAIN MENU

The **CLOSED TICKET INQUIRY** screen displays the following information:

- Account Number of the customer
- Agreement/Ticket Number
- Sequence Number
- Closed Date
- Closed Reason
- Description
- Amt Due/remaining balance of the agreement

There are also three icons at the far right:



This icon will allow the agreement to be reopened.



This icon will take you to the *View Payment History* screen.



This icon will allow you to print the *Agreement Information and Payment History*.

To view the detailed Rental Agreement information, click anywhere on the line displaying the agreement for which you would like to inquire/review.

CLOSED TICKET INQUIRY							
Account	Ticket	Seq	Closed	Closed Rsn	Desc	Amt Due	
1008798	1008798	0	5/06/15	PAYOUT SATISFAC	FEE ACCT	0.00	... 🔍 🖨
1008798	1034490	0	5/06/15	REQUEST PICKUP	TV LCD 32	1076.40	... 🔍 🖨

Navigation: >> << BACK MAIN MENU

## Closed Ticket Inquiry Screen

There are two detailed agreement information screens. To view the additional information on page two, click the **NEXT SCREEN** button.

### CLOSED TICKET INQUIRY – PAGE 1

CLOSED TICKET INQUIRY – PAGE 1

Name: SMITH, DAVID	Account: 1008798	Ticket: 1034490
Closed Reason: REQUEST PICKUP	Closed Date: 5/06/15	
Salesmen: 10	Agreement #: 0	
Acct Manager: 901	Agreement Dt: 10/03/12	
Store: 1      Rule: 1	Source: TV	
Customer Type: R	Agreement Typ: A	
Tax Group: 0001	Payment Terms: W	
Closed By: 998	Deposit Amt: 0.00	
# BOR Items:	# Times Late: 6	

→ NEXT SCREEN
← BACK
🏠 MAIN MENU

### CLOSED TICKET INQUIRY – PAGE 2

CLOSED TICKET INQUIRY – PAGE 2

Name: SMITH, DAVID	Account: 1008798	Ticket: 1034490
Closed Reason: REQUEST PICKUP	Closed Date: 5/06/15	
Rate Of Payment: 17.94	Rate Of Grp: 2.24	Rate Of ESP: 0.00
Rate Of Tax: 1.26	Total Reg Due: 21.44	Next Payment Due: 2/06/13
Agreement Amount: 1,399.32	Agreement Balance: 1,076.40	Balloon Payment:

**RESULTS**

Model #	Serial #	Pmt Amt	Revenue	Agreement Date
EBRCAL32WD14	G182E1445	17.94	322.92	10/03/12

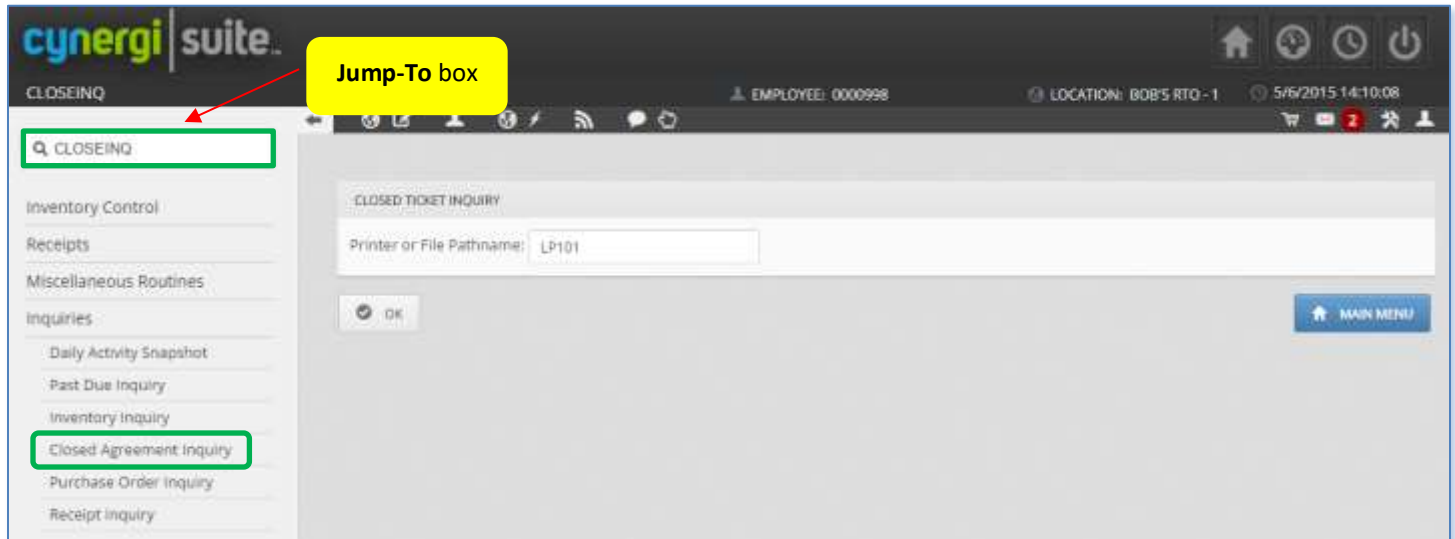
→ NEXT SCREEN
← BACK
🏠 MAIN MENU

Click the **NEXT SCREEN** or **BACK** button to return to the customer’s *Closed Agreement* list. From here you can either inquire on other *Closed Agreements* for the current customer or continue to back out to the *Customer Search* screen.

## Reopen a Closed/Inactive Rental Agreement

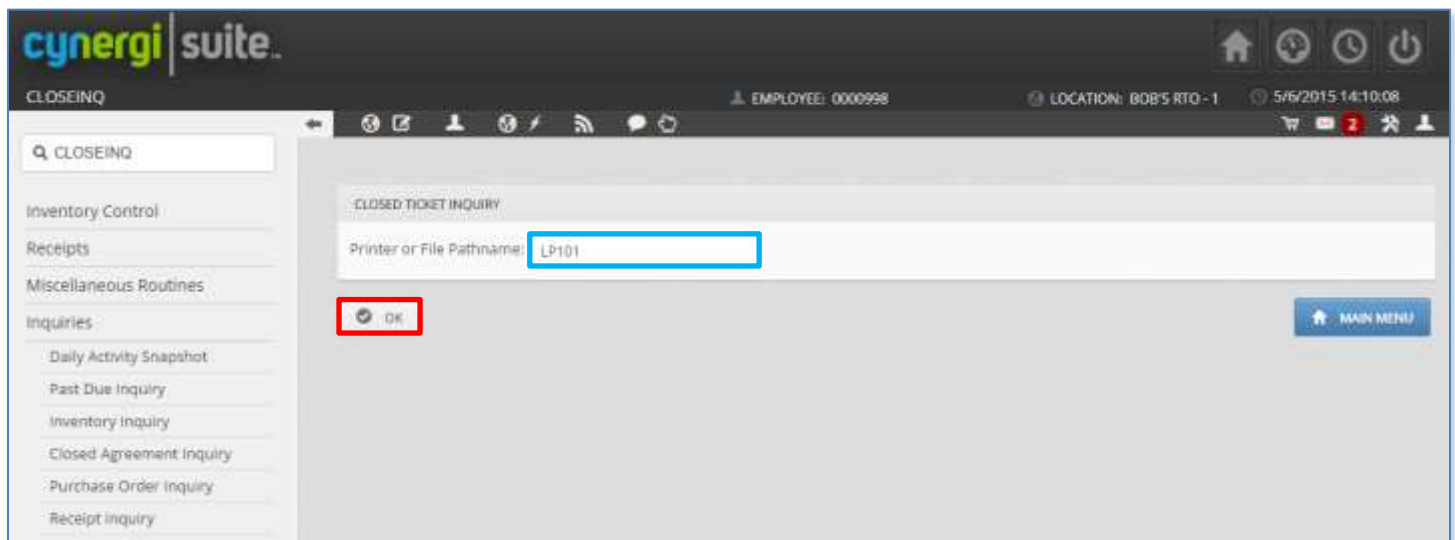
To reopen a Closed/Inactive Rental Agreement, type **CLOSEINQ** into the **Jump-To** box and press the **TAB** or **ENTER** key. You may also select it from your company's cynergi|suite menu.

*Please Note: Your menu option may be different than what is shown below.*



Generally, not all employees are able to reopen a Closed/Inactive Rental Agreement. This feature is often secured to a higher security level. The first prompt will be the **Printer or File Pathname**. The correct printer name should be the default. However, if it isn't, simply enter the printer name you would like to use.

Once you have verified the correct printer name, click the **OK** button to continue.



Enter the customer’s name into the *Customer Search* and click the **SEARCH** button to continue.

*Please Note:* If the customer you are searching for does not have any active rental agreements, the *Store* location must be changed to 0 to include inactive customers in the search.

CUSTOMER SEARCH

Search For: Name ▾ SMITH D Store: 0-BOB'S RTO SEARCH

\*\* ONLY GROUP FOR YOUR PARAMETERS \*\*

Store	Account	Last Name	First Name	Address	City	License	
1	1008798	SMITH	DAVID	1234 MAIN ST.	ANYTOWN		🔍 ✎ ✕
2	1008778	SMITH	DANYALA	5157 C.P. KEEN R	ANYTOWN		🔍 ✎ ✕
4	1008558	SMITH	DENNIS	6416 NEW YORK ST	ANYTOWN		🔍 ✎ ✕
	1007049	SMITH/BECK	DENNIS/SHE	2625 S. 90 TH ST	ANYTOWN		🔍 ✎ ✕

Showing 1 to 4 of 4 entries 1

ADD CUSTOMER PREV 100 NEXT 100 MAIN MENU

The customer’s **Closed/Inactive Rental Agreements** will be displayed.

Click anywhere on the line displaying the *Customer Name* for which you would like to reopen an agreement.

CUSTOMER SEARCH

Search For: Name ▾ SMITH D Store: 0-BOB'S RTO SEARCH

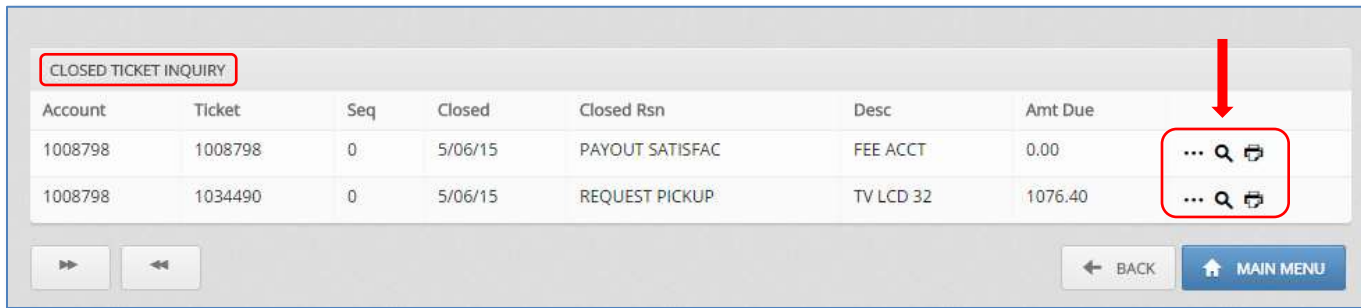
\*\* ONLY GROUP FOR YOUR PARAMETERS \*\*

Store	Account	Last Name	First Name	Address	City	License	
1	1008798	SMITH	DAVID	1234 MAIN ST.	ANYTOWN		🔍 ✎ ✕
2	1008778	SMITH	DANYALA	5157 C.P. KEEN R	ANYTOWN		🔍 ✎ ✕
4	1008558	SMITH	DENNIS	6416 NEW YORK ST	ANYTOWN		🔍 ✎ ✕
	1007049	SMITH/BECK	DENNIS/SHE	2625 S. 90 TH ST	ANYTOWN		🔍 ✎ ✕

Showing 1 to 4 of 4 entries 1

ADD CUSTOMER PREV 100 NEXT 100 MAIN MENU

There are three icons at the far right of the **CLOSED TICKET INQUIRY** screen that may be used.



Will provide the option to reopen the rental agreement.

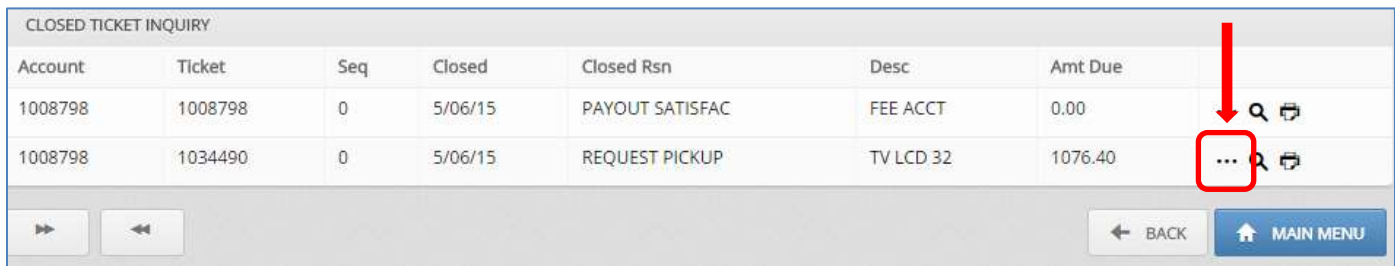


To view the *Payment History* of the rental agreement.



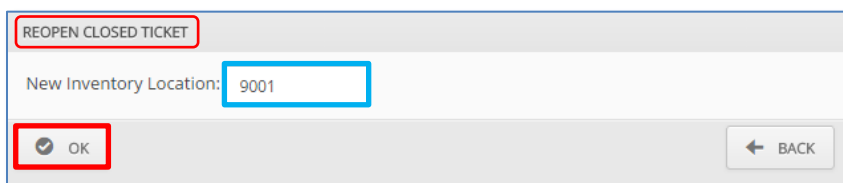
Allows the option to print the *Agreement Information* and *Payment History*.

To open a Closed Agreement, click the  icon.

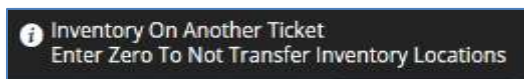


The **REOPEN CLOSED TICKET** screen will display the *New Inventory Location* where the inventory will be upon reopening the Agreement/Ticket. In this example, 9001 is the *Inventory Location* for customer home at store 001.

Click **OK** to continue to the next screen.

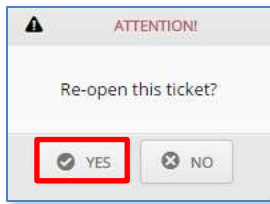


**Please Note:** At this point, if the inventory is no longer available (Idle) when attempting to reopen a closed agreement, the following message will appear at the bottom left of the screen:

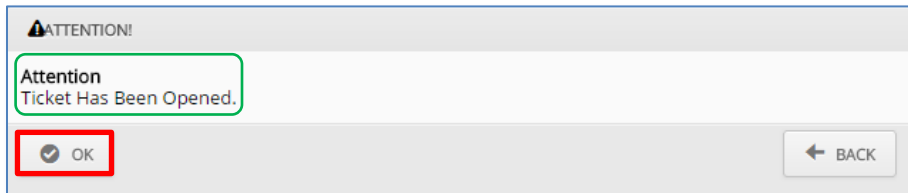


If this is the case, the agreement will not be able to be reopened.

Click **YES** to continue.



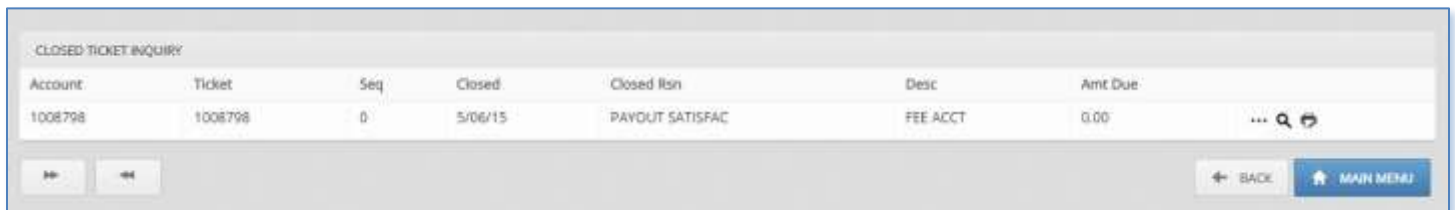
The rental agreement has been reopened. Click **OK** to continue.



The agreement can be printed, but it is not required. Click either **YES** or **NO** to continue.



The reopened agreement will no longer be displayed on the **CLOSED TICKET INQUIRY** list.



The agreement is now active and available in the *Rental Payment (RP)* screen.

**Please Use Caution:** The Agreement Due Date will remain the same as it was when the agreement was closed. Reopening a Closed Agreement does NOT advance the due date. You will need to resolve this based upon how your company handles reopening a Closed Agreement.

