Store Manual

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Chapter 8: Inventory

Web Order Feature

The cynergi|suite store system provides clients the ability to have a series of **Application Program Interfaces (APIs)** available to allow a client's website to interface with the cynergi|suite system for specific customer and product information.

Core Benefits with Web Order

- The web order feature provides the ability for **current or prospective customers** to request or **order** products **online** (through a web browser or kiosk) and integrate these requests into the cynergi|suite store system.
- A new *Web Order Home* screen will **display pending**, **completed**, or **cancelled web orders**.
- A new **notification** at the top right of the cynergi|suite screen will display the number of open pending web orders.
- Pending **new customer** web orders can **easily** be **converted** into a **new agreement** by automatically adding the customer information collected from the website into the cynergi|suite customer record.
- Pending **existing customer** web orders can **easily** be **converted** into a **new agreement.** The customer information collected by the website is available for employees to review and possibly update the existing customer's information.
- Model Numbers and/or Product Descriptions selected by the customer via the website will automatically be pre-populated when the pending web orders are converted into **new agreements**.
- Clients can create or update their own website **ordering page** by executing appropriate APIs as needed, or by utilizing a High Touch developed ***Web Widget*** that can be used within their website.

API Introduction

The information contained within this document is proprietary to High Touch Technologies. The implementation or use of the APIs and functionality described within is subject to applicable licensing fees. The web order feature integrates product orders placed on the Internet by customers (prospective or existing) with the cynergi|suite application. This is done through a series of APIs that are being made available, or through a ***Web Widget*** developed by High Touch.

- The initial phase takes the basic customer and order information gathered from the website and integrates it with the Customer Maintenance program (**RCUSTMNT**) and the New Rental Agreement program (**NEW**) within cynergi|suite.
- Furthermore, any notes or comments from the website can be reviewed in cynergi|suite.
- *<u>Please Note</u>: More fields continue to become available over time.*

Setup and Enabling the Web Order Feature

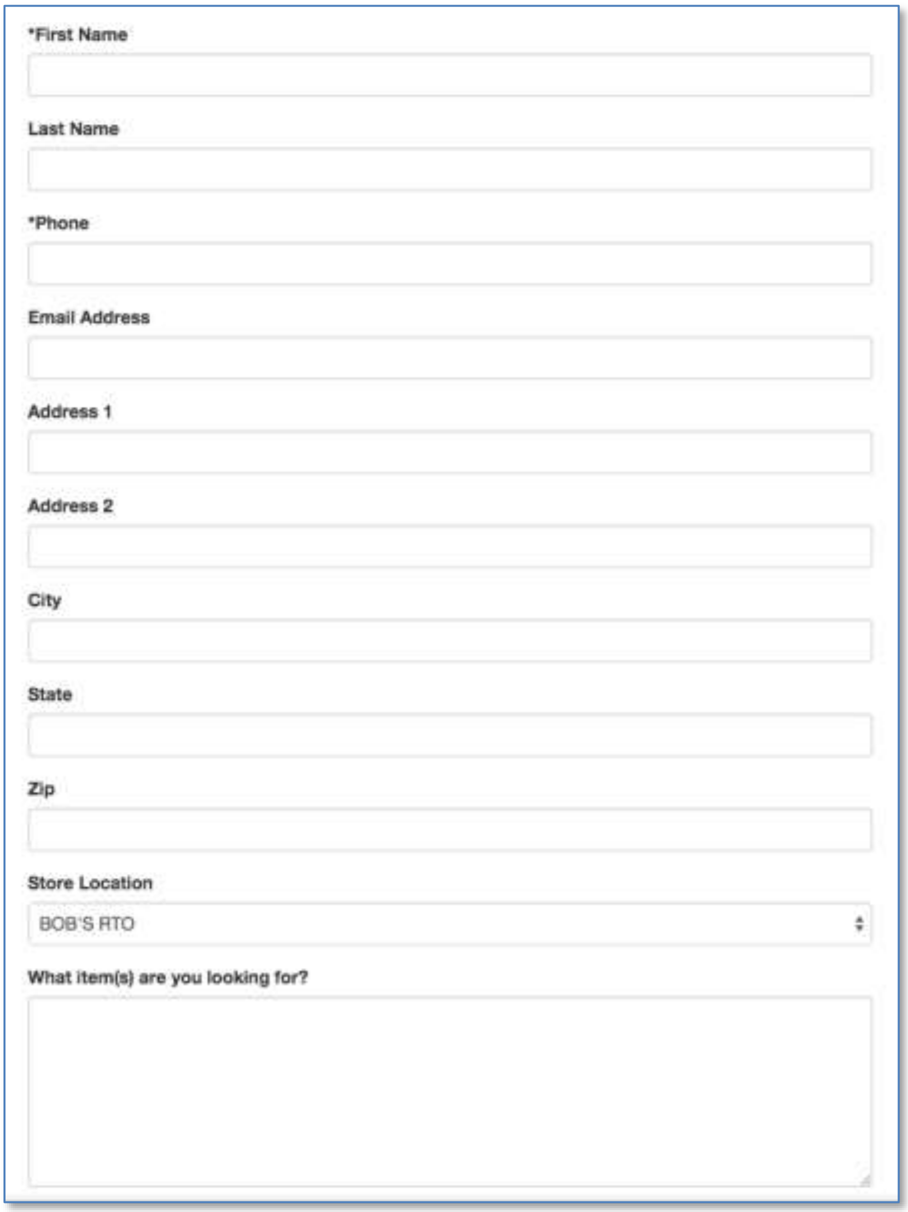
To activate or begin using the web order feature, please contact High Touch Technologies and talk with your **Account Manager** to arrange licensing and get scheduled for this feature to be implemented. Furthermore, you will be provided an authentication key to be used in the API calls.

There are two options for implementing the web order feature:

- From a client's web page, a High Touch provided ***Web Widget*** can be used to integrate with cynergi|suite web order feature.
- For clients with an IT staff, the web page can integrate with cynergi|suite by executing the appropriate APIs as needed.

Placing a Customer Web Order from a Website

A customer (prospective or existing) can access the company website. With the ***Web Widget***, the customer is prompted to enter basic customer information, as seen in the picture below. An option is available for the customer to enter some notes as well. For those clients with an IT staff, Customer selected Model Numbers and Product Descriptions can be captured and passed to the cynergi|suite system. The IT staff can integrate with the appropriate APIs.


*First Name

Last Name

*Phone

Email Address

Address 1

Address 2

City

State

Zip

Store Location

BOB'S RTO

What item(s) are you looking for?

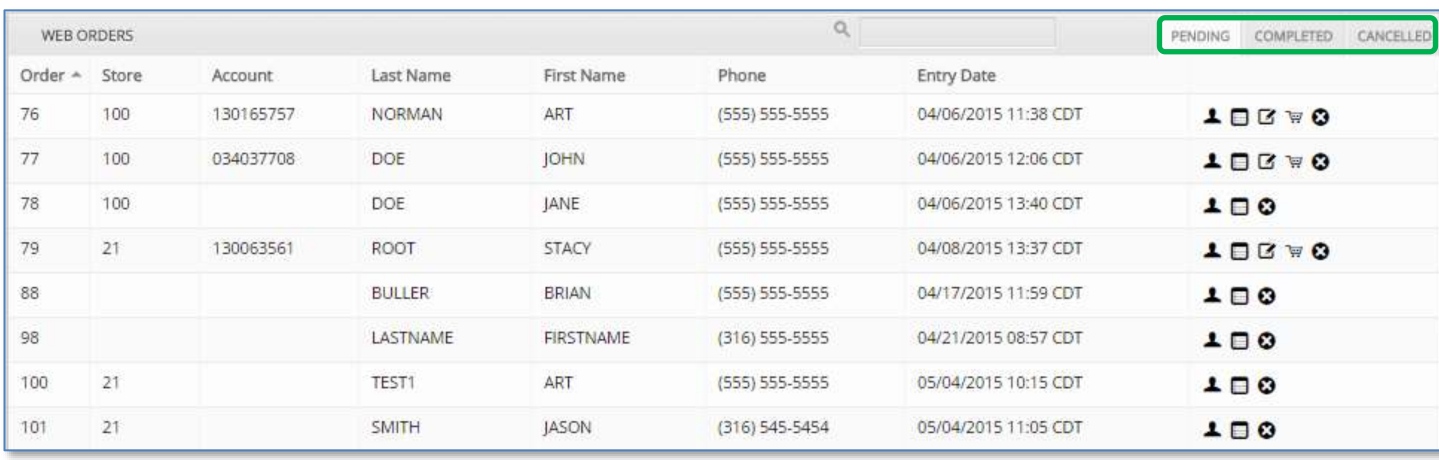
Upon submitting the order, the web page will immediately call the appropriate API to add the customer web order information into the cynergi|suite store system. The order will then be available for processing by an employee at the store location or at a centralized call center.

Accessing and Reviewing the Web Orders Home Screen

You can access the *Web Orders* home screen by simply typing **WEBORDER** into the ***Jump-To*** box and pressing the **TAB** or **ENTER** key. You can also select it from your company's cynergi|suite menu. Furthermore, you may click on the **Web Orders Basket** icon at the upper right side of the *Application Bar*. The number inside the blue circle next to this icon indicates how many pending web orders are available to be processed. This notification is updated every minute to notify when a new web order is present.

Upon entering the *Web Orders* home screen, there are three main tabs available:

- **PENDING** – Lists all customer web orders waiting to be processed. This is the default screen that appears after accessing the *Web Orders* home screen.
- **COMPLETED** – Lists all web orders that were processed and had an agreement created for them.
- **CANCELLED** – Lists any web orders that were cancelled.



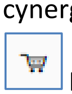
WEB ORDERS — PENDING | COMPLETED | CANCELLED

Order	Store	Account	Last Name	First Name	Phone	Entry Date
76	100	130165757	NORMAN	ART	(555) 555-5555	04/06/2015 11:38 CDT
77	100	034037708	DOE	JOHN	(555) 555-5555	04/06/2015 12:06 CDT
78	100		DOE	JANE	(555) 555-5555	04/06/2015 13:40 CDT
79	21	130063561	ROOT	STACY	(555) 555-5555	04/08/2015 13:37 CDT
88			BULLER	BRIAN	(555) 555-5555	04/17/2015 11:59 CDT
98			LASTNAME	FIRSTNAME	(316) 555-5555	04/21/2015 08:57 CDT
100	21		TEST1	ART	(555) 555-5555	05/04/2015 10:15 CDT
101	21		SMITH	JASON	(316) 545-5454	05/04/2015 11:05 CDT

Each screen will have several sortable columns:

- **Order** – The order number is automatically assigned to every customer web order brought into the cynergi|suite store system. The list initially sorts in sequential order.
- **Store** – This is the store number provided by the customer while creating the order through the website. This will become the ***Default Store Number*** for new customers added through this screen.
- **Account** – This is the cynergi|suite ***Customer Account Number***. This field is initially set to blank for new pending web orders until either a new customer is created or the web order customer is associated with a pre-existing customer in cynergi|suite.
- **Last Name** – This is the web order customer's last name entered on the website.
- **First Name** – This is the web order customer's first name entered on the website.
- **Phone** – This is the web order customer's contact phone number entered on the website.
- **Entry Date** – This is the date and time the customer web order information was entered and submitted through the website.
- **Agreement Number** – This is the ***Agreement Number*** that the web order turns into if it is processed. This column is only available on the **COMPLETED** tab.

The last column consists of several **Action** icons that are available depending upon the status or progress of each web order listed. The actions are as follows:

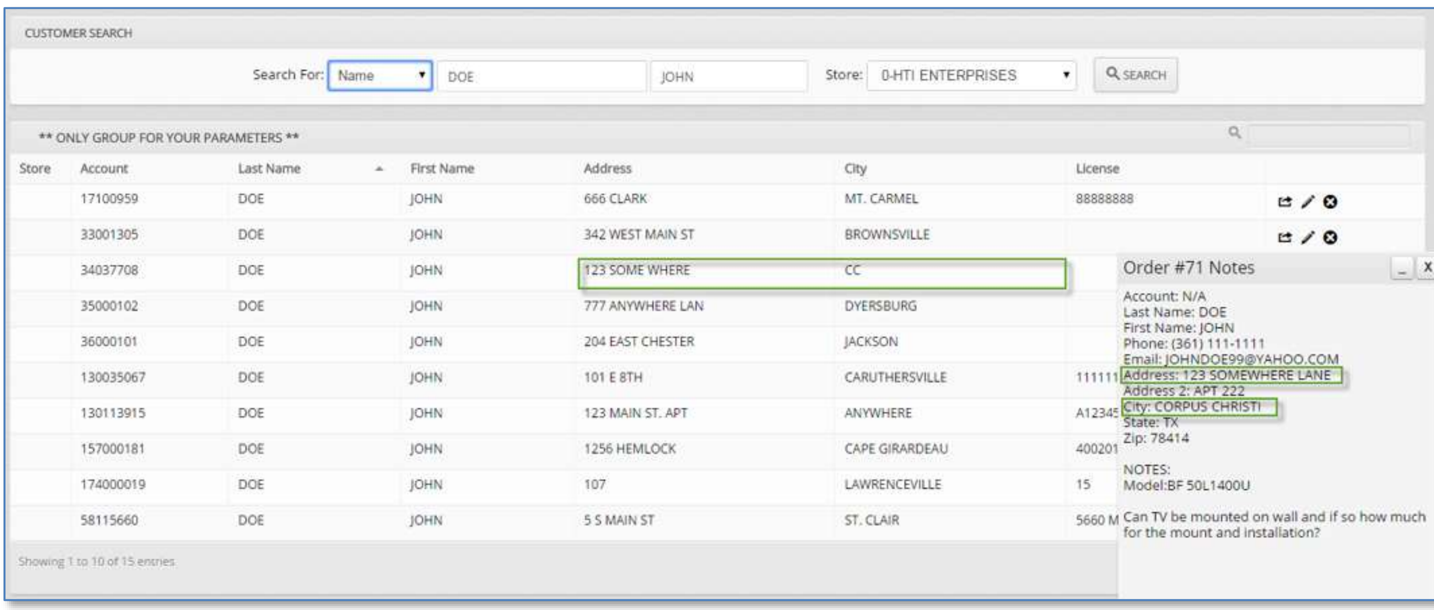
-  **Customer Link** – This icon links the user to the Customer Maintenance screen (***RCUSTMNT***) and opens the notes window for that web order.
    - If the web order customer account number is still blank (not established in cynergi|suite yet), then the link will take the user to a list of all pre-existing customers with the same first and last name.
    - If the customer already exists in the cynergi|suite software, then the user can associate the web order customer with the pre-existing customer record.
    - If the web order customer does not already exist in cynergi|suite, then the user can create a brand new customer record with the information provided from the website. There are several pre-populated fields in the new customer record.
        - Please see **Processing a Pending Web Customer** on the next page for further explanation.
    - Once a web order customer is associated with a customer record (new or pre-existing), the customer account number displays on the pending *Web Orders* home screen. Furthermore, the icon will take the user directly into the customer record to be updated or changed.
-  **Order Notes** – This icon will open up a window to display any notes entered by the web order customer on the website. The notes will also contain basic customer and product information for the web order. The notes window will remain active in foreground and can be moved around on the screen if needed (via drag and drop). *Please Note: When the notes window is open for a particular web order, it will stay open until it is closed or another web order processes and replaces the current notes window.*
-  **Cancel Order** – This icon will cancel the web order and place it in the **CANCELLED** tab. It is used if a web order is placed on the website, but it is decided that the web order will not be processed. The cancelled web order will still be available for review, or it will be available for future processing by accessing the **CANCELLED** tab.
-  **Move to Pending** – This icon is only available for cancelled orders and appears in the **CANCELLED** tab. Clicking this icon will move the cancelled order back to the **PENDING** list for processing.
-  **Rental Agreement** – This icon will link to the new rental agreement program (**NEW**) for the selected web order customer and will display the order notes window. This icon is only available for web orders that have a cynergi|suite customer record already created and/or associated with it.
-  **Rental Payment** – This icon will take you to the rental payments (**RP**) detail screen for that web order customer. This icon is only available for web orders that have a cynergi|suite customer record already created and/or associated with it.

Processing a Pending Web Customer

The first step in processing a pending web order is to identify if the customer already exists in cynergi|suite or if they are a brand new customer. From the pending *Web Orders* home screen, click on the **Customer** icon for the web order you wish to process.

Example 1: Pre-existing cynergi|suite Customer

In this example, the **Customer Details Link** icon for John Doe is clicked, which presents the *Customer Search* list screen of all customers with the last name "DOE" and a first name starting with "JOHN," along with the **Order Notes** window for that web order.

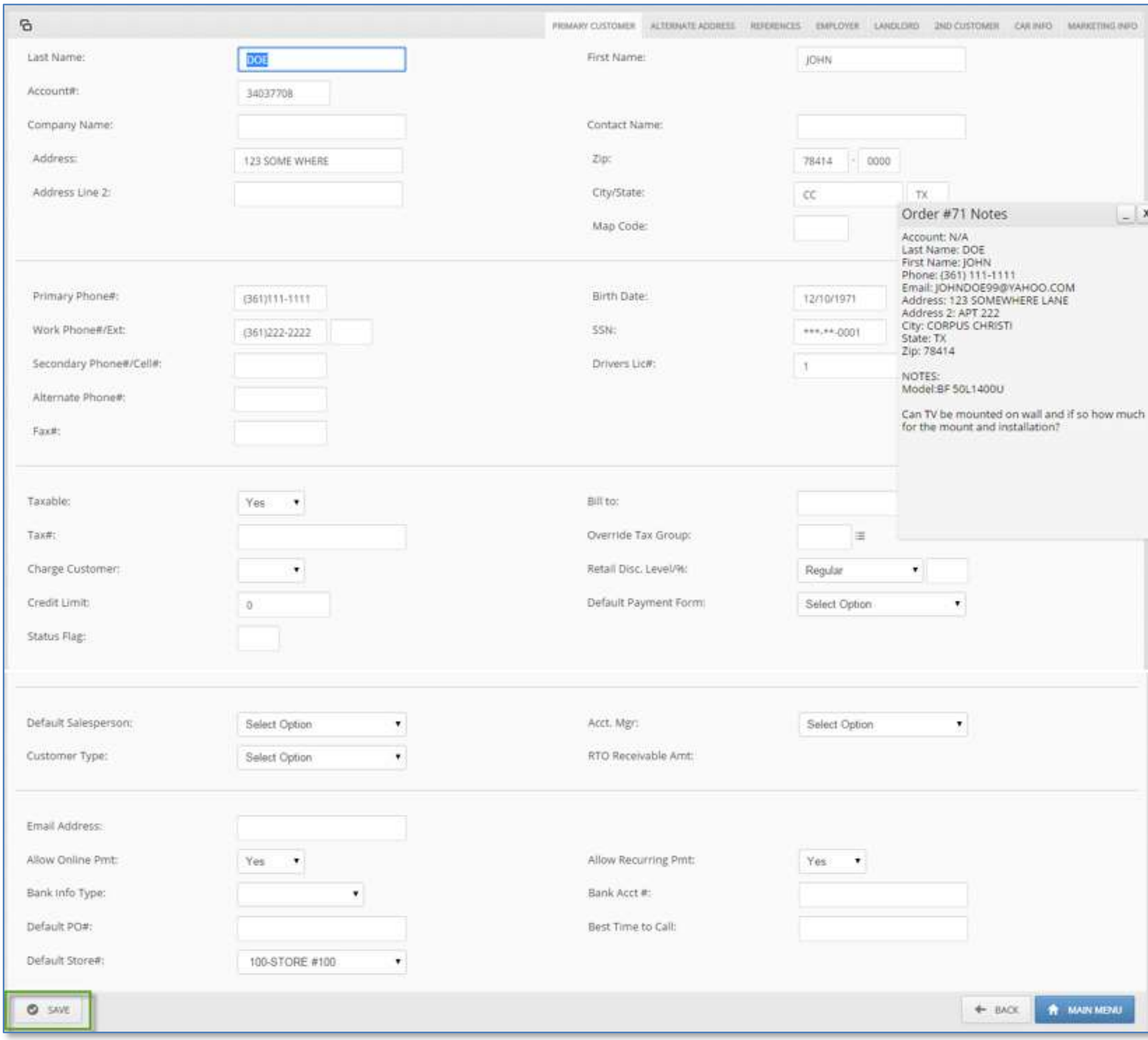


To avoid potentially creating a duplicate customer record, pay close attention to the address and city from the list and compare to the **Order Notes** window to see if there are any possible matches.

- In this example, there are two pages of potential customer matches. Be sure to scroll through all pages when checking for possible matches.
- The **Order Notes** pop-up window can be moved by dragging the window and dropping it somewhere else on the screen so that the next page button can be clicked. It will stay open until it is closed or a new web order is started.

If there appears to be a pre-existing customer matching the web order customer, then click on the customer name to open the detailed customer record screen to see the details.

*<u>Please Note</u>: If it is determined that the customer is not the same person as the web order, simply click the **<u>BACK</u>** button at the bottom of the screen to continue looking for a match or to create a new customer.*

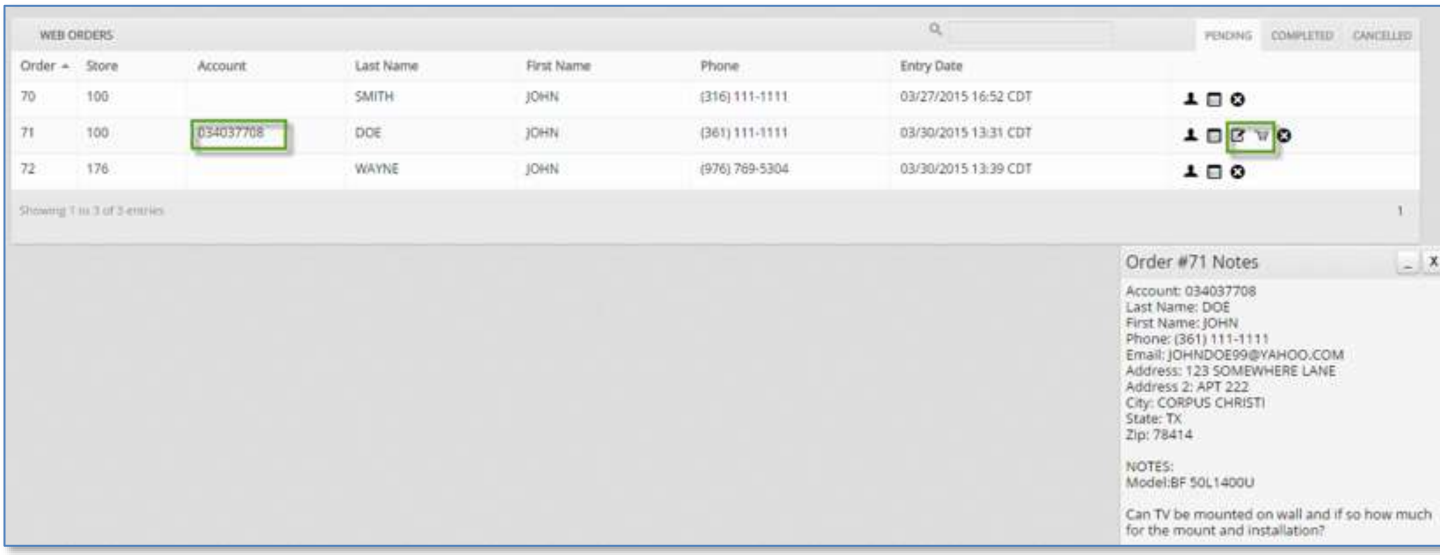


When associating the web customer with a pre-existing customer, the information from the **Order Notes** will not populate or overwrite any data in the original customer record. Therefore, if updates are needed to the original pre-existing cynergi|suite customer, they should be entered at this time. When finished with the updates, click the **SAVE** button at the bottom left of the screen to save the customer information and associate the web order customer with the original pre-existing cynergi|suite customer record.

Please Note: You must click ***SAVE*** *on the* ***PRIMARY CUSTOMER*** *tab in order to save any changes and populate fields on other tabs.*

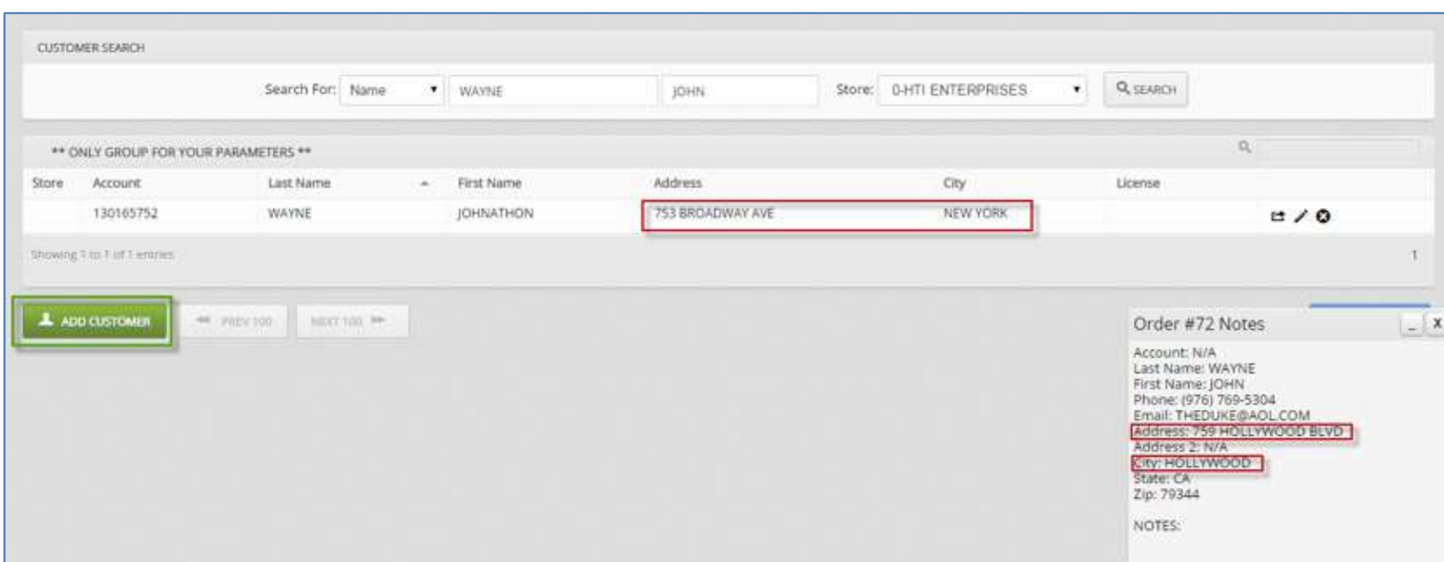
After clicking **SAVE** and returning back to the *Web Orders* home screen, the following will occur:

- The associated **Customer Account Number** will appear.
- The **Rental Agreement** and **Rental Payment** action buttons will appear for that web order.



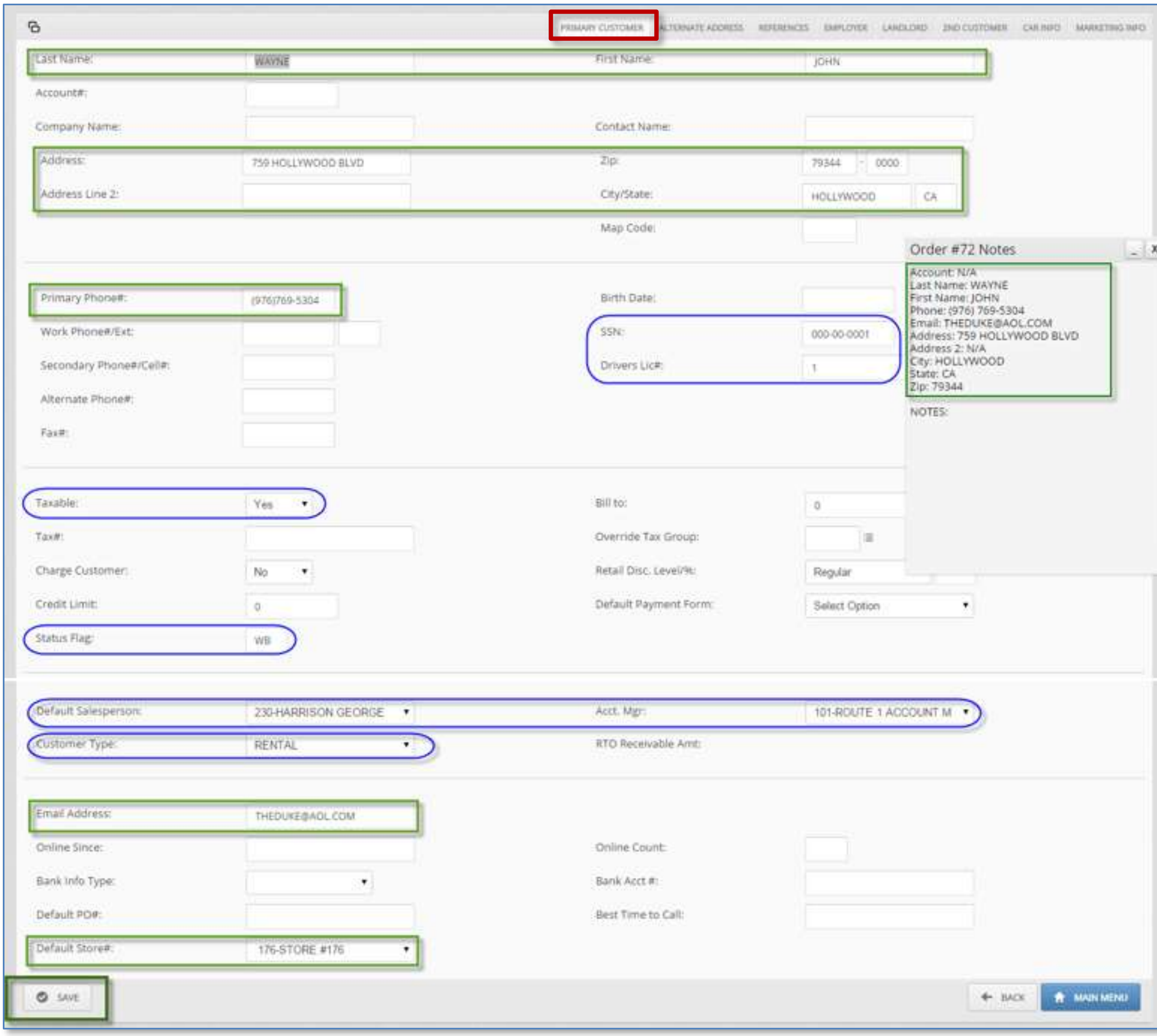
Example 2: New Web Order Customer

This example illustrates creating a new customer from the *Web Orders* home screen that did not previously exist in the cynergi|suite system. The **Customer Details Link** icon for John Wayne is clicked from the *Web Orders* home screen, which presents the *Customer Search* list screen with the last name "WAYNE" and a first name starting with "JOHN." The **Order Notes** are also presented and it is determined with this example that this customer does not exist. Click the **ADD CUSTOMER** button at the bottom of the screen to add the new web order customer into cynergi|suite.



After clicking **ADD CUSTOMER**, the new customer screen will appear. However, some information will already be pre-populated.

- The information gathered from the website via the ***Web Widget*** (represented by the green boxes) will automatically be entered into the appropriate fields.
- If using the ***Web Widget***, only the ***Primary Customer*** tab of the customer record is pre-populated, so other information will need to be entered manually. However, if integrating with cynergi|suite using APIs, the fields on all of the other tabs are also available to be pre-populated with data collected from the website.
- Those fields identified by the blue circles that are not passed via the ***Web Widget*** or the APIs will be pre-populated with the default values defined by the Home Office on the Customer/Inventory API Defaults Interface Control Maintenance record.



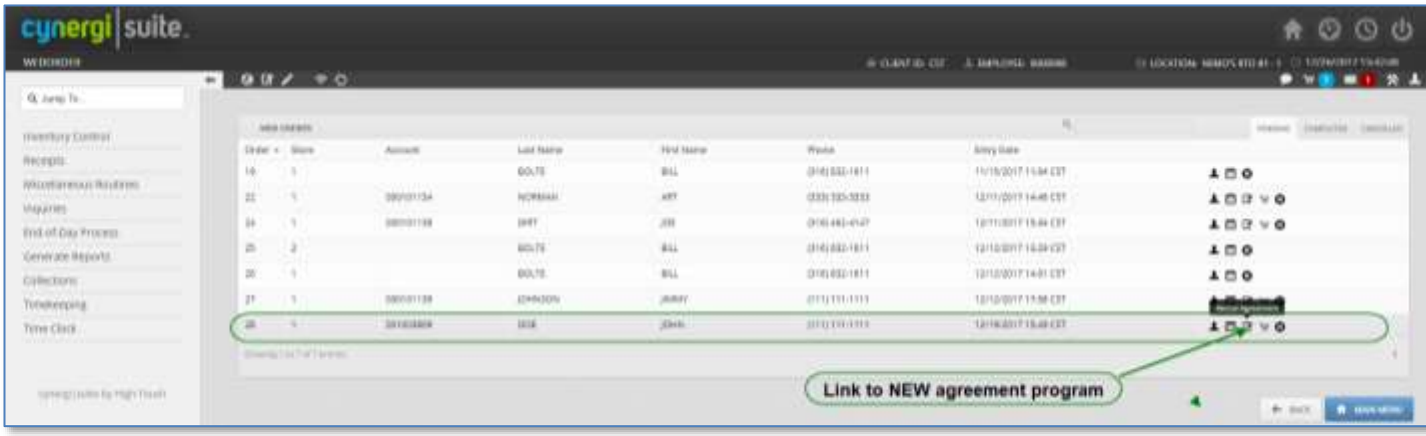
After clicking **SAVE** at the bottom of the screen and returning to the *Web Orders* home screen, the following will occur:

- The associated **Customer Account Number** will appear.
- The **Rental Agreement** and **Rental Payment** action buttons will appear for that web order.

Processing a Pending Web Order

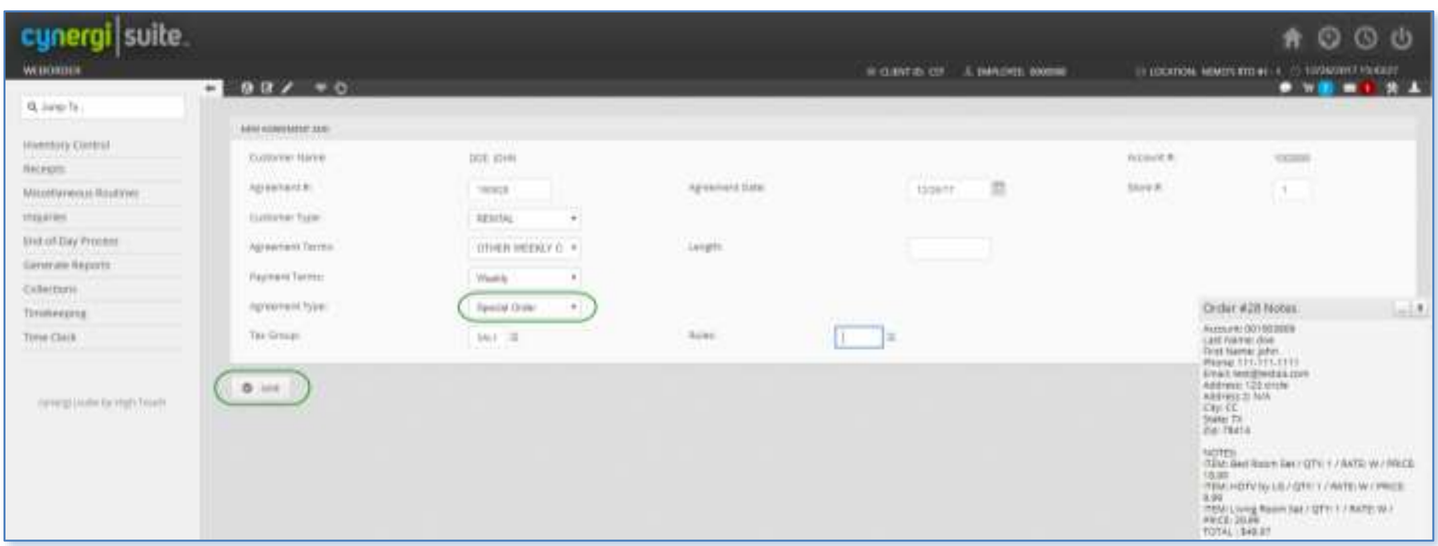
Once a pending web order customer has been created in cynergi|suite, the **Rental Agreement** icon becomes available. Click the icon to go to the *New Agreement Add* screen from the *Web Orders* home screen and have selected model numbers pre-populated for them.

Web Order Screen



The *New Agreement Add* screen will appear with the customer and store number (from the customer's default store number) already pre-populated. Furthermore, the **Order Notes** window will also appear. Continue through the new agreement creation process by selecting the appropriate agreement and payment terms. Upon completion, click the **SAVE** button at the bottom of the screen.

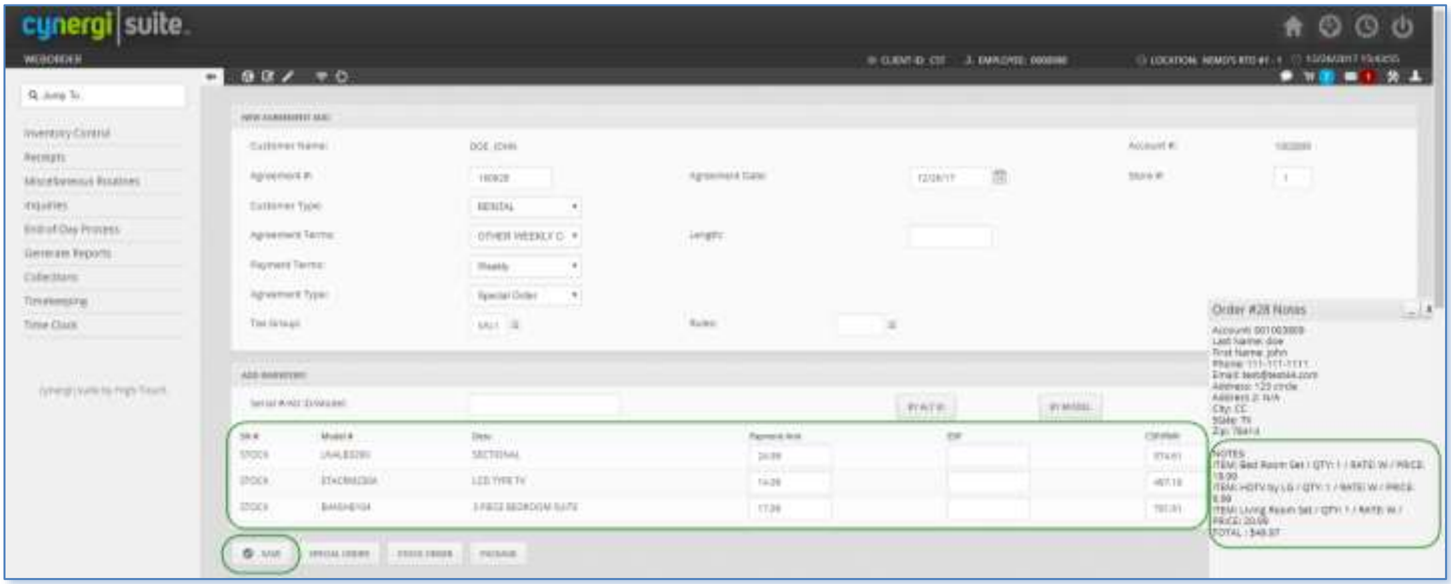
New Agreement Initial Screen (Special Order)



For clients that have integrated with the appropriate APIs, the customer selected model numbers and descriptions will automatically be pre-populated as illustrated in the following screen.

If the user selects an Agreement Type of "*Special Order*" and then clicks on the **SAVE** button, the model numbers will immediately be pre-populated with a serial number of "*STOCK*."

New Agreement Initial Screen with Model Numbers Pre-Populated for Special Order/Stock Type Agreement

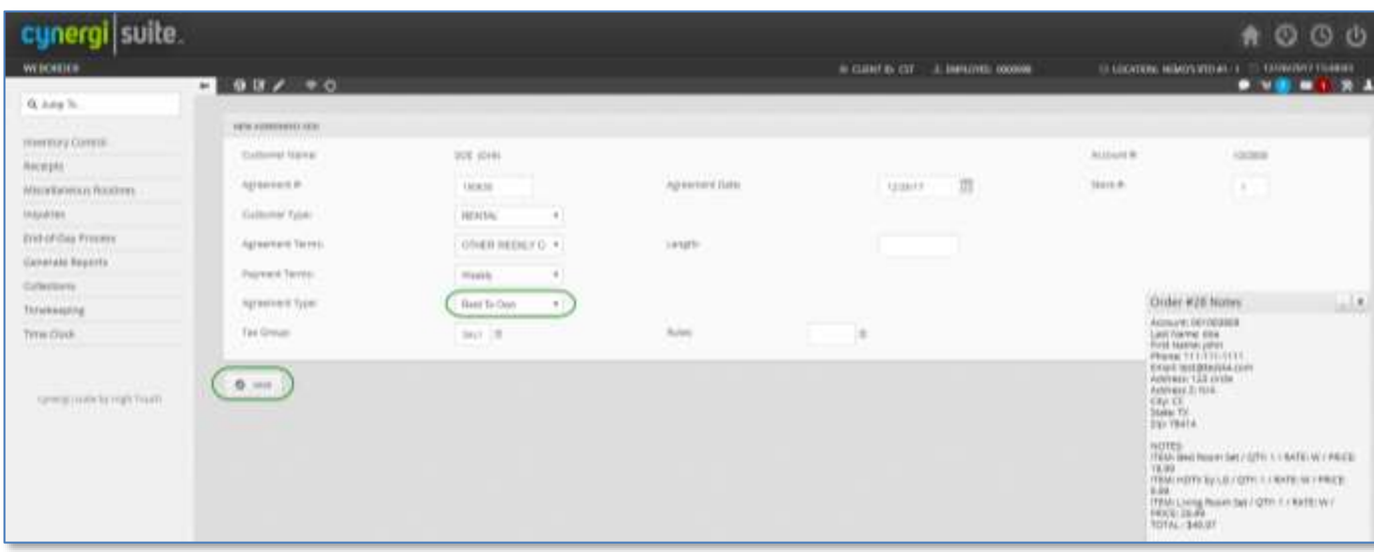


The user should be able to verify the items on the agreement with the items listed in the **Order Notes** window. Once verified that all of the selected items are included on the agreement, the user can click on the **SAVE** button to proceed as usual with creating an agreement.

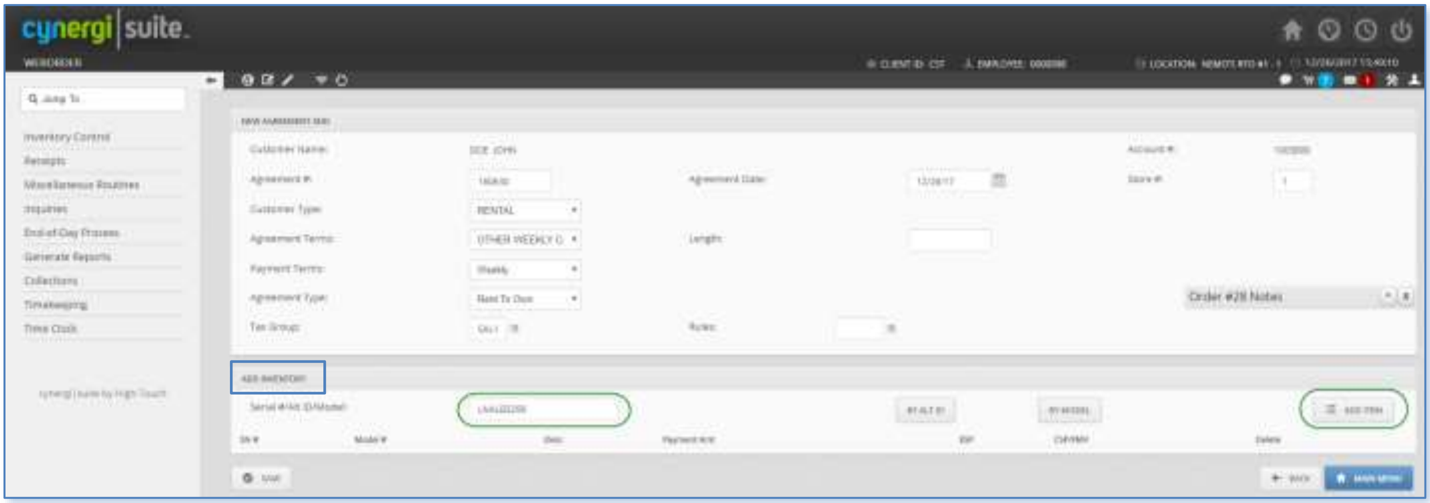
*Please Note: Ideally, the **Order Notes** window should also include the model number for reference.*

If the user selects an Agreement Type of "Rent to Own" and clicks on the **SAVE** button, then the model numbers will preload one at a time for the user to search available inventory for the selected item.

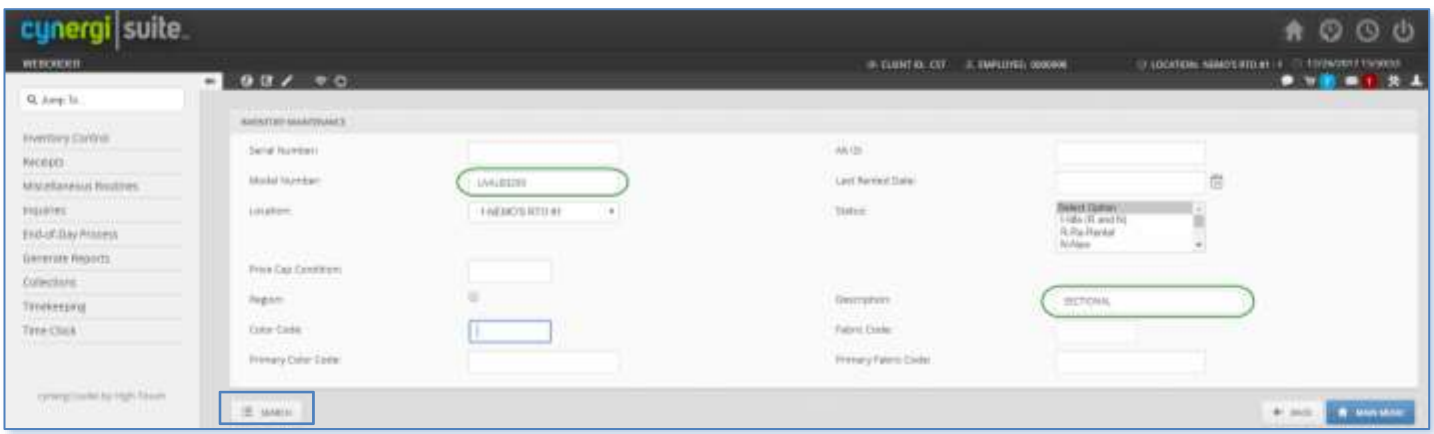
New Agreement Initial Screen (Rent to Own)



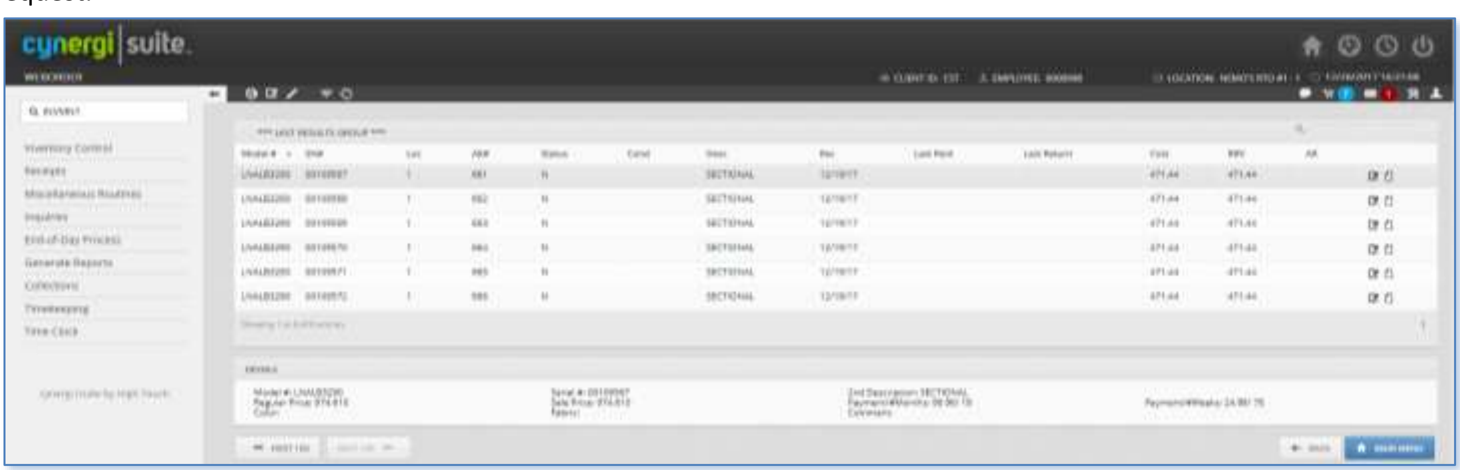
After clicking on the **SAVE** button, the **ADD INVENTORY** section of the screen will appear with the first model number pre-populated.



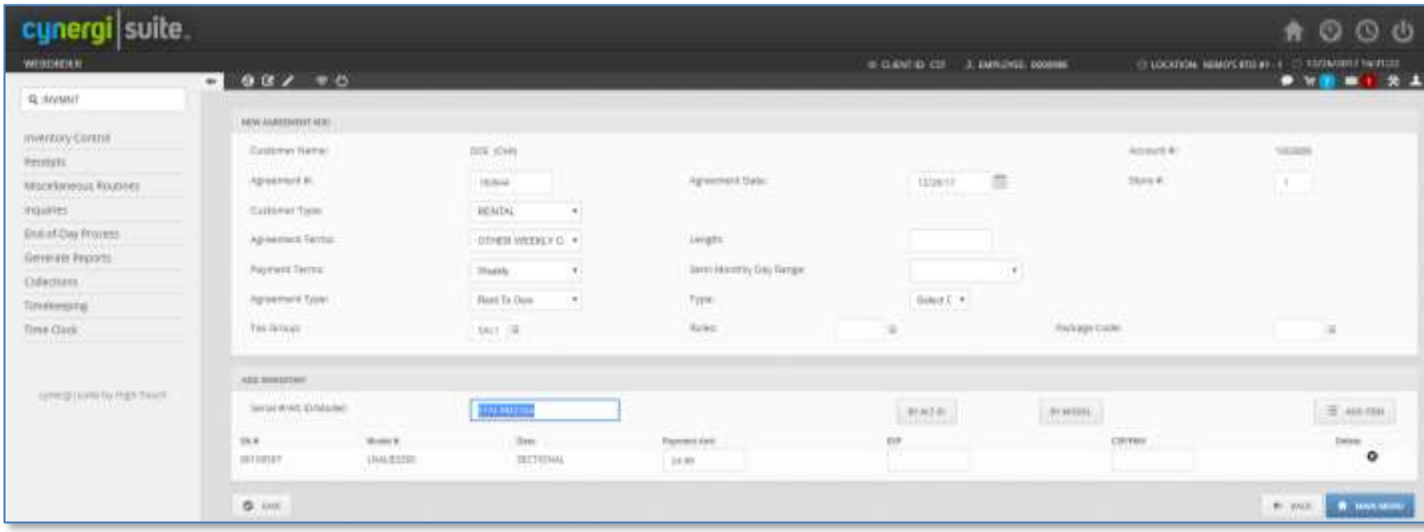
The user clicks on the **ADD ITEM** button to move to the *Inventory Selection* screen (**INVMNT**). On the *Inventory Selection* screen, the model number and description from the web order table will automatically be pre-populated.



The user then clicks on the **SEARCH** button to see if there are any of the selected items in stock. If there are no inventory available for a particular model number, the user can choose to remove the model number on the *Inventory Search* screen and search only by description to see if there is a comparable or suitable alternative to the customer's request.



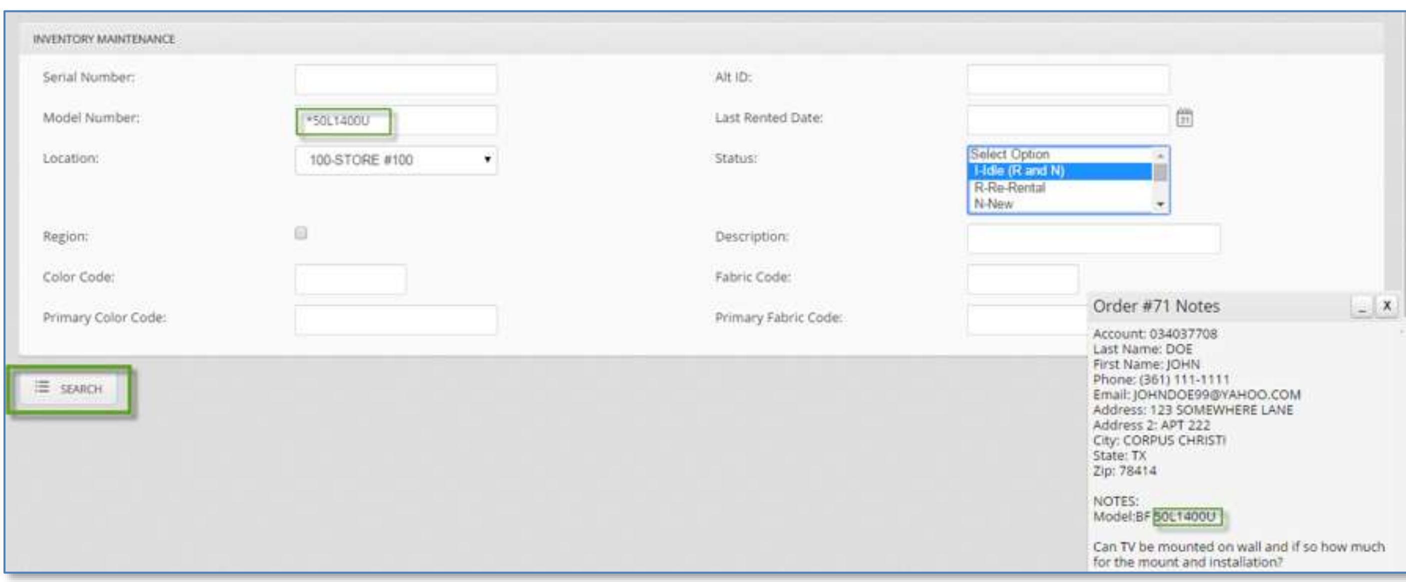
The user selects the desired item to add to the agreement. The process then repeats for the next item. This process continues until there are no more items selected by the online shopper to pre-populate the agreement.



After adding inventory, the user clicks the **SAVE** button to continue adding the agreement as normal.

For clients that have not integrated with the appropriate APIs but are instead using the High Touch provided ***Web Widget***, model numbers and descriptions will **NOT** be passed through the web order function and will need to be entered manually into the new agreement as follows.

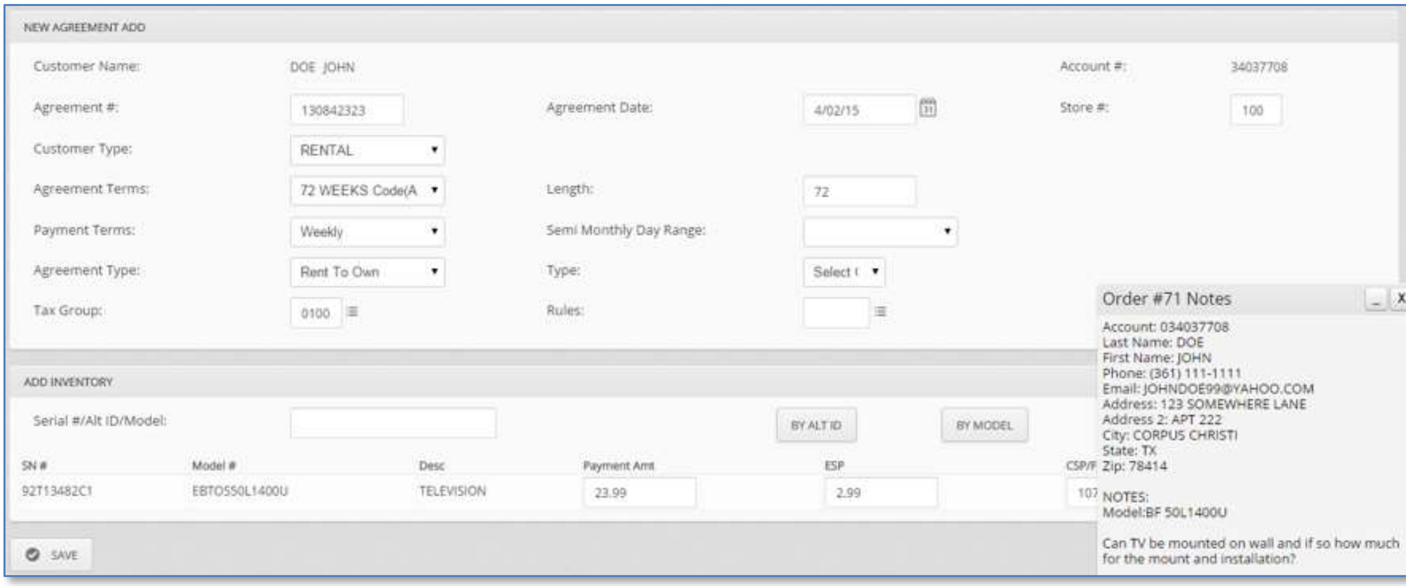
While continuing through the agreement creation process, the Inventory Maintenance screen will appear to select the inventory for the agreement. You can reference the Model Number and/or the Description information within the **Order Notes** window to search for and select the appropriate inventory.



When all desired inventory units have been selected for the web order, the new agreement process continues as normal. If the customer is not present during this process, the initial payment may need to be handled in a different manner.

The following methods for processing the initial payment can be used:

- Process a zero dollar or a $0.01 receipt
- Customer Deposit or Receivable may be applied
- Take the payment over the phone
- Defer the initial payment



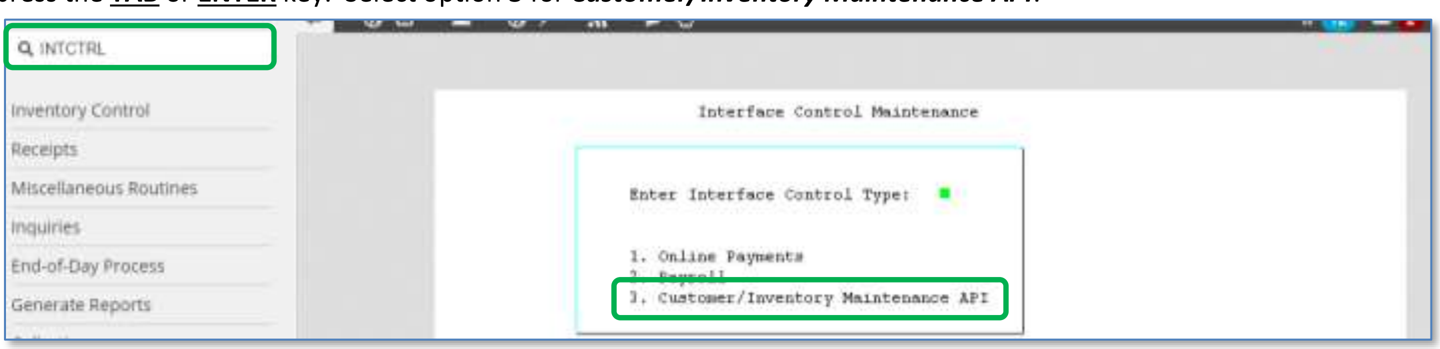
After the web order agreement process is complete, the screen will go back to the main *Web Orders* home screen and the completed web order will be moved to the **COMPLETED** tab.

Web Order Setup

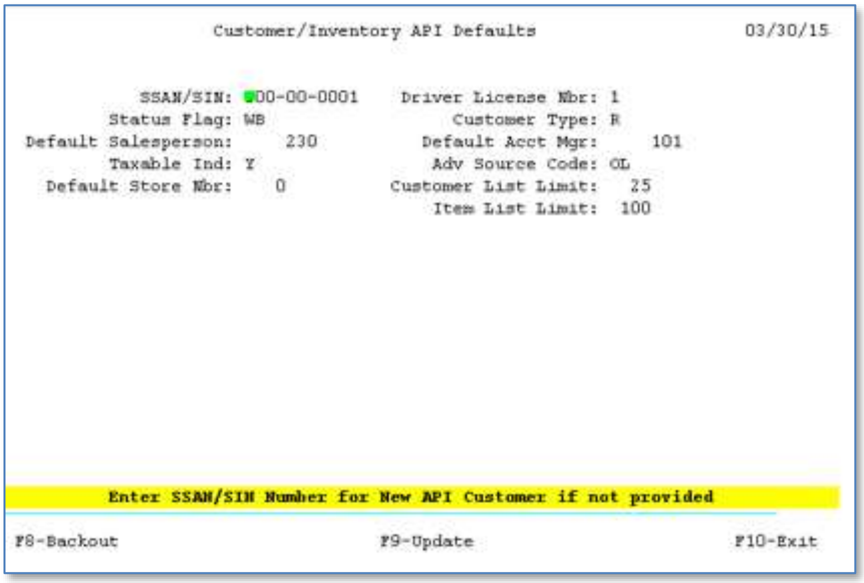
Before implementing the web order, all of the necessary API calls will need to be programmed into the customer facing webpages that collect customer and order information. An alternative would be to utilize the High Touch provided ***Web Widget***.

Before utilizing the web order feature, it is recommended to define some user defaults in the *Customer/Inventory Maintenance API* screen of the *Interface Control Maintenance* program (**INTCTRL**). These user-defined defaults can provide initial values for customer records created through the Web Order API for data fields that may (or cannot) be collected from the website.
Please Note: These field defaults are optional. If not defined or passed via the API, the fields will remain blank on the customer records created through the web order feature until the data is manually entered by the employee.

To define the default values, type **INTCTRL** into the ***Jump-To*** box at the upper left side of the cynergi|suite screen and press the **TAB** or **ENTER** key. Select option **3** for ***Customer/Inventory Maintenance API***.



The Customer/Inventory API Defaults screen will appear. Update the defaults based on preference.


Customer/Inventory API Defaults 03/30/15

SSAN/SIN: 000-00-0001 Driver License Nbr: 1
Status Flag: WB Customer Type: R
Default Salesperson: 230 Default Acct Mgr: 101
Taxable Ind: Y Adv Source Code: OL
Default Store Nbr: 0 Customer List Limit: 25
Item List Limit: 100

Enter SSAN/SIN Number for New API Customer if not provided

F8-Backout F9-Update F10-Exit

Customer/Inventory API Definitions

- **SSAN/SIN:** Default "Social Security Number" or "Social Identification Number" (Canada). Although the web order APIs pass social security numbers using encryption for security reasons, clients may still desire not to collect this info from a website. If a default SSAN/SIN number is entered on this screen, any customers that are added through the Web Widget or web order APIs without a social security number will have their SSAN/SIN automatically pre-populated with the value entered in this field.
- **Driver's License:** Default Driver's License Number. Although the web order APIs pass driver's license numbers using encryption for security reasons, clients may still desire not to collect this info from a website. By entering a default driver's license number on this screen, any customers that are added through the Web Widget or web order APIs will have their driver's license number automatically pre-populated with the value entered in this field.
- **Status Flag:** Default Status Flag. The "status flag" is a two-character user-defined free-form field on the customer record for customer labeling. The web order and Customer Maintenance APIs do pass and accept the status flag. However, if a status flag is not passed via the API, then the value entered here will automatically be pre-populated for customers added through web order or the Customer Add API.
- **Customer Type:** The customer type is the default Agreement/Ticket type for any agreements that are added for the customer. The valid values for customer type are included in a client defined table, so the API does not pass or accept the customer type. However, if a value is entered on this screen, then that value will automatically be pre-populated for customers added through the web order or the Customer Add API. To see a list of available customer types, leave the field blank and press **ENTER**.
- **Default Salesperson:** A value entered here will automatically be pre-populated for customers added through web order or the Customer Add API. To see a list of available salespersons, key in "9999999" and press enter. Press **F1** to see more names in the list if necessary.
- **Default Acct Mgr:** A value entered here will automatically be pre-populated for customers added through web order or the Customer Add API. To see a list of available account managers, key in "9999999" and press enter. Press **F1** to see more routes in the list if necessary.

- **Taxable Ind:** The taxable indicator can be passed via the API. A value entered here will automatically be pre-populated for customers added through web order or the Customer Add API, but only if the taxable indicator is not passed in the API. It is recommended that the value here always be set to “Y.”
- **Adv Source Code:** The “advertising source code” is a two character client defined code, so this field is not passed via the API. However, a value entered here will automatically be pre-populated for customers added through web order or the Customer Add API. To see a list of available advertising source codes, key in “??” and press **ENTER**. Press **F1** to see more codes in the list if necessary.
- **Default Store Nbr:** The “default store number” can be passed via the API. A value entered here will automatically be pre-populated for customers added through web order or the Customer Add API, but only if the default store number is not passed in the API.
- **Customer List Limit:** This is the maximum number of customer records that will be returned in a single call of the Customer List API. The Customer List API allows the client to get a list of pre-existing customers by name, with matching indicators for identifying fields like zip code, date of birth, last four digits of SSAN, and up to two phone numbers.

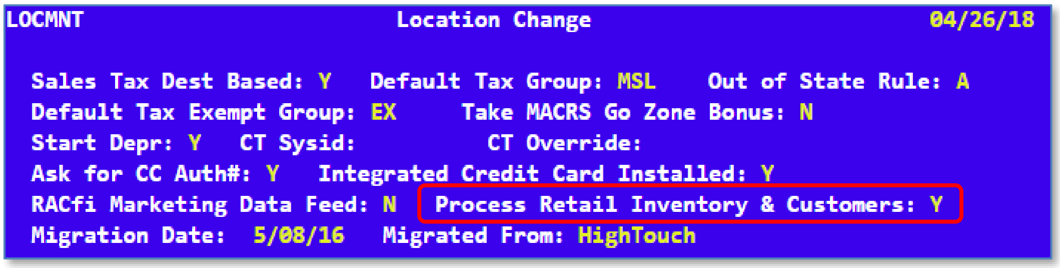
  Please Note: Too large of a number may cause the API to time out, while a small number may require excessive calls to the API for a complete list. It is recommended to start at the default value of 25 and adjust if needed.
- **Item List Limit:** This is the maximum number of item (model number) records that will be returned in a single call of the “Catalog Load” API. The Catalog Load API allows the client to get active model number information to assist in building an online catalog.

  Please Note: Too large of a number may cause the API to time out, while a small number may require excessive calls to the API for a complete list. It is recommended to start at the default value of 100 and adjust if needed.

Process Retail Inventory and Customers

Retail Inventory is defined as inventory items that were previously rented from a retail store, then returned to a Rent To Own store where they must be manually received. These Inventory units can be identified as "Retail" Inventory during the manual receiving process.

To enable receiving **Retail** inventory there is a setting on the **LOCMNT** record that must be set.
Location Maintenance (LOCMNT) Process Retail Inventory and Customers Switch. Setting the switch to a "**Y**," will allow the **Retail** Inventory Items to be manually received.



Please Note: The setting will need to be changed for each location that will be manually receiving Retail Inventory.

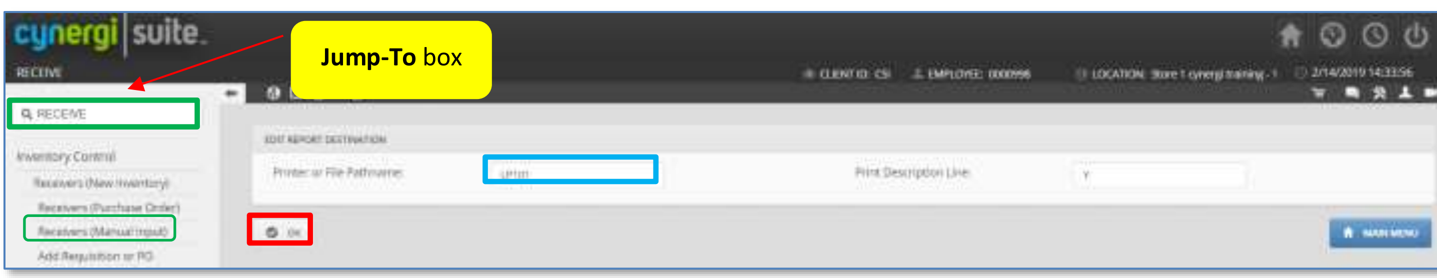
Retail Inventory units, will have a **Retail Inventory indicator** that will be set to "**Y**." They will also have additional fields for a specific **Retail Inventory Number**, and **Retail Inventory Remaining Value**. These three indicators are available on several cynergi|suite reports.

Inventory Control Process Retail Inventory

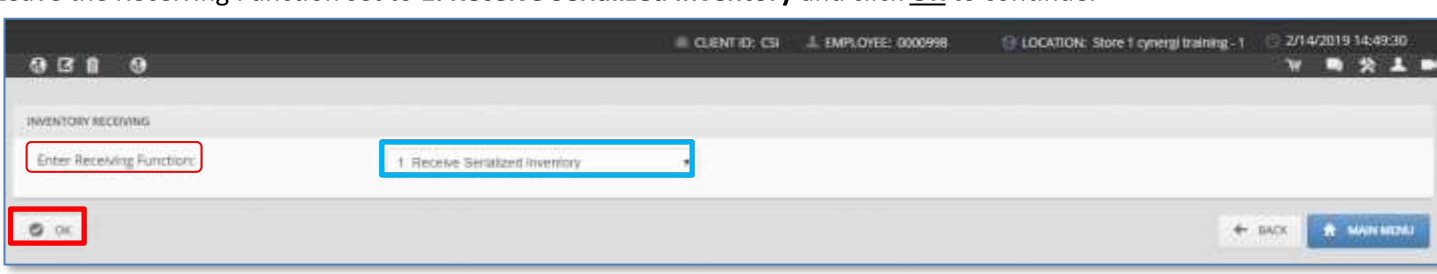
Receive (Manual Input) of Retail Inventory

To begin, type **RECEIVE** into the ***Jump-To*** box and press the **TAB** or **ENTER** key. You may also select Receivers (Manual Input) from the cynergi|suite menu.
Please Note: Your menu option may be different from what is shown below.

The **Printer or File Pathname** will default to the store printer, which may be changed if needed. Click **OK** to continue.

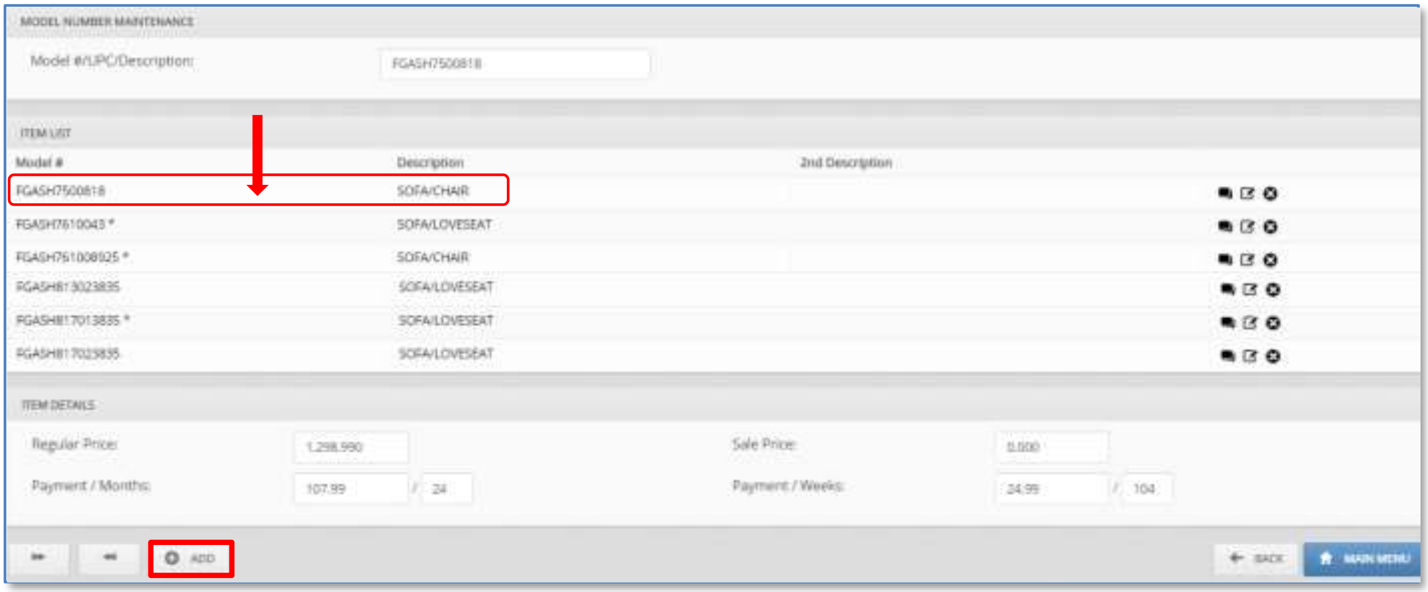


Leave the Receiving Function set to **1. Receive Serialized Inventory** and click **OK** to continue.



Enter the cynergi|suite model of the "Retail" inventory unit to be received, and then click **<u>SEARCH BY MODEL</u>**.

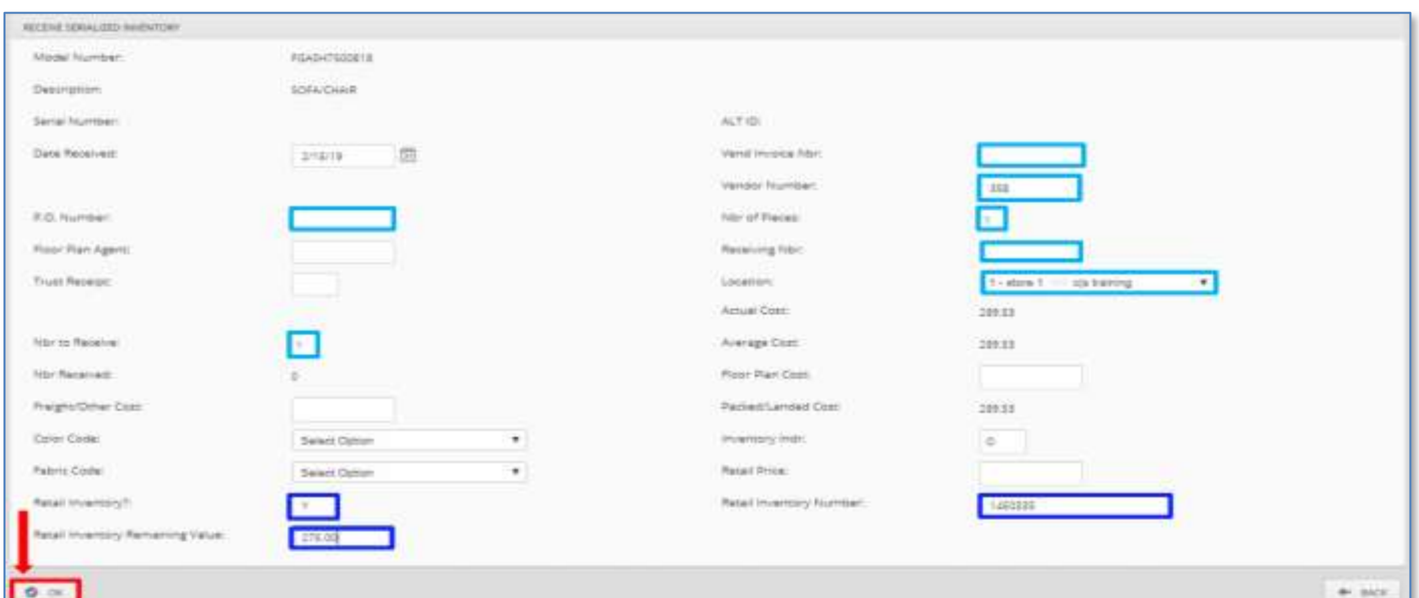
If the model exists, select it from the list. If the model does not exist, it will need to be added. A new model can be added by clicking the **<u>ADD</u>** button at the bottom of the screen.



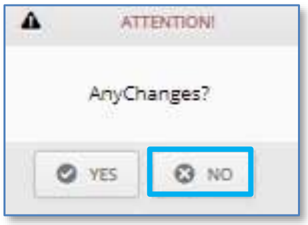
Enter the receiving information in the standard fields as needed. Enter the "Retail" inventory information into the three Retail fields at the bottom of the screen.

- **Retail Inventory?** – Enter "Y"
- **Retail Inventory Number** – Enter the retail identifying number (Should be provided from Retail Store)
- **Retail Inventory Remaining Value** – Enter the remaining value of the retail Inventory item, at the time the item is manually received (Should be provided from Retail Store).

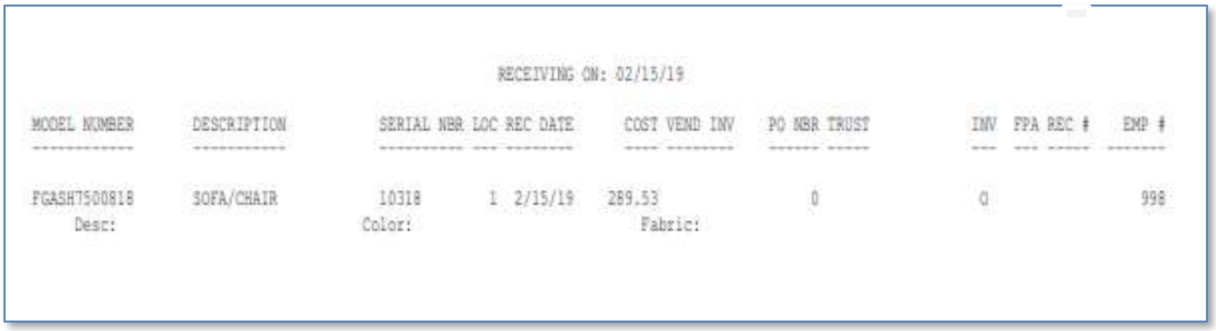
Click **<u>OK</u>** to continue.



Click **NO** to continue.



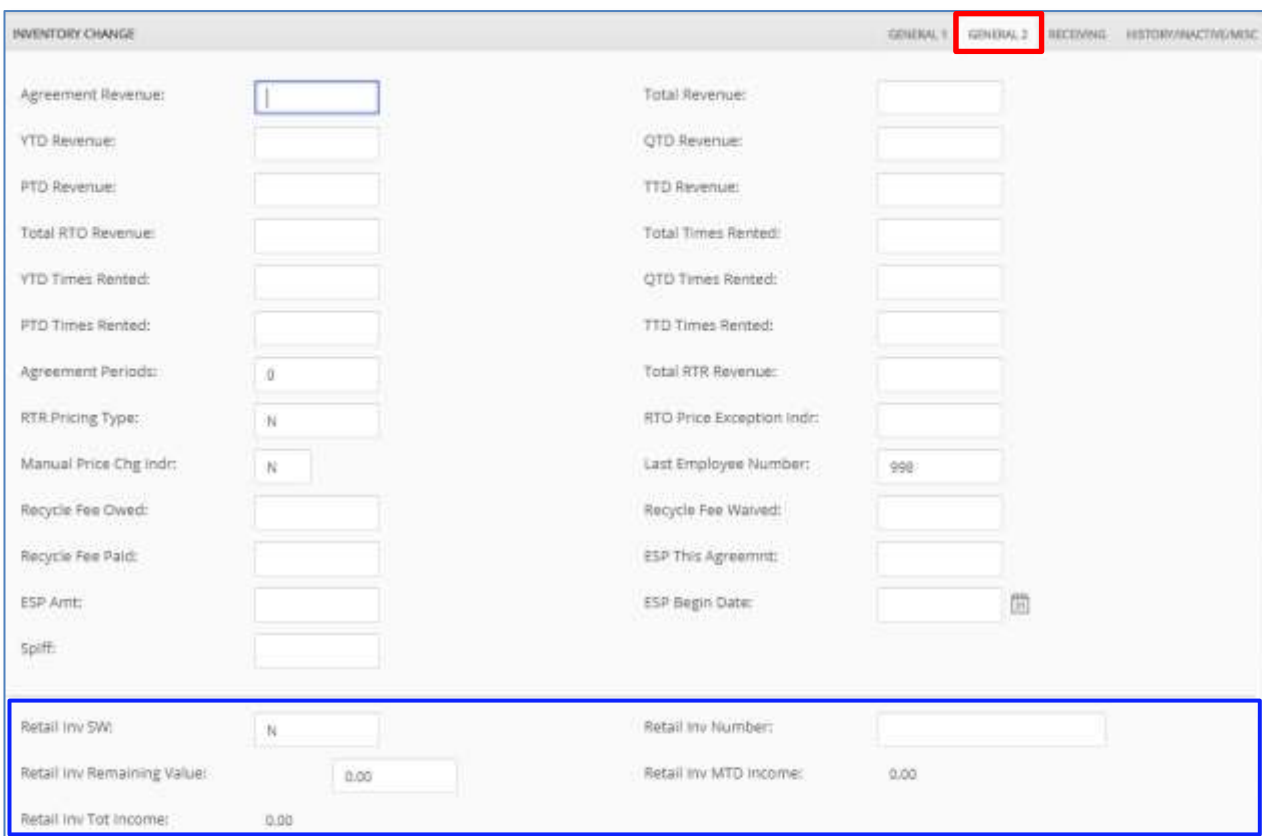
The Receiving Document will print. The **Manual Receiving process is complete**.



After the "Retail" Inventory unit has been received, the Retail information can be found under the ***GENERAL 2*** tab of the inventory inquiry (**INVMNT**).

GENERAL 2 Tab

- **Retail Inv SW** – Retail Inventory switch, Yes/No
- **Retail Inv Number** – The Retail Identifying Number
- **Retail Inv Remaining Value** – Remaining value of the retail Inventory item, at the time received
- **Retail Inv MTD Income** – The Month-To-Date Income for the retail Inventory item
- **Retail Inv Tot Income** – The total income for the retail Inventory item

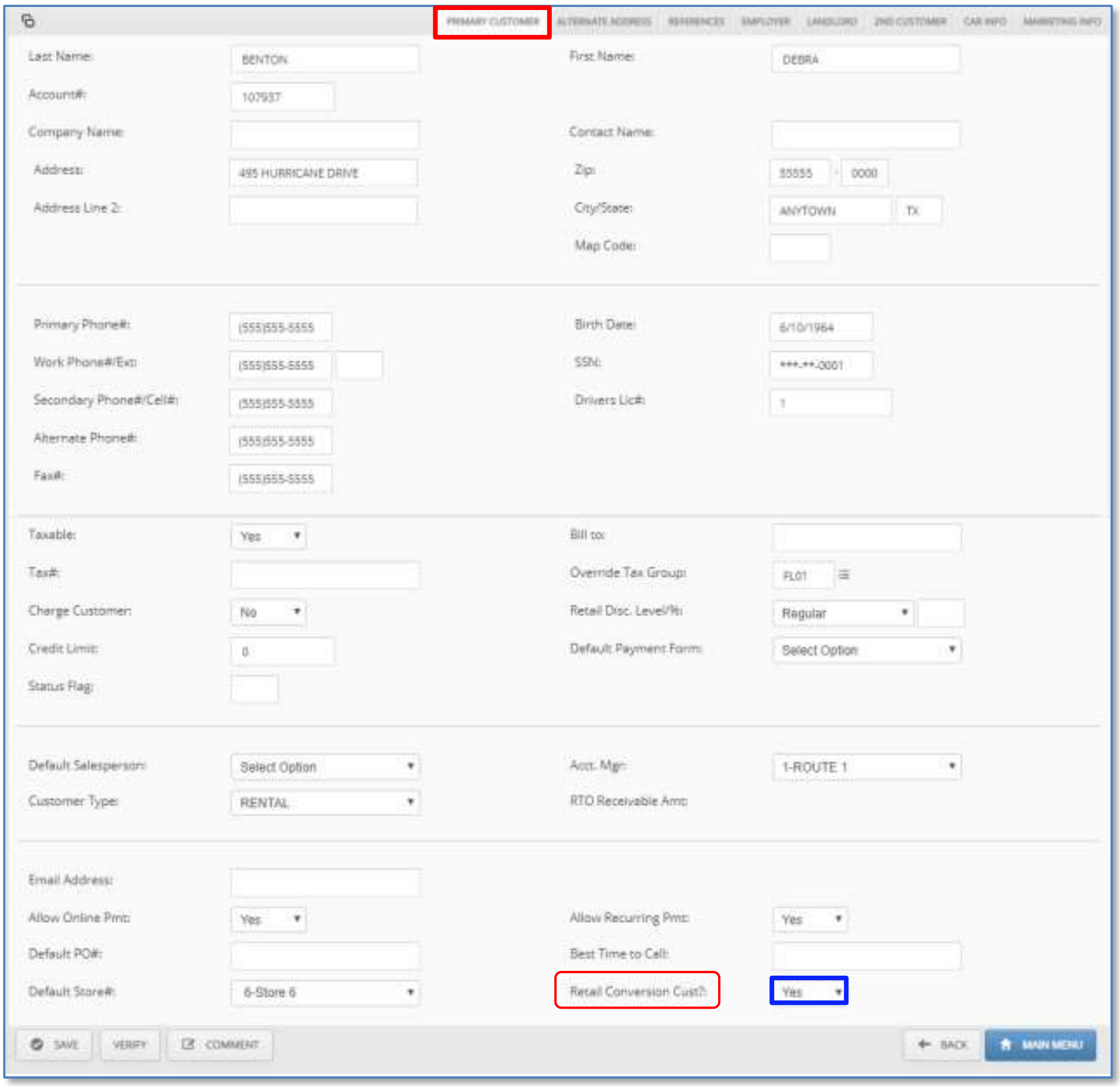


Retail Conversion Customer Add

When a Retail Customer returns their items to a Rent to Own store, their customer information may be added into the Rent to Own store, and identified as a "**Retail Conversion Customer**." Additional reporting is available to track Retail Conversion Customers.

Use the same Customer Add process as normal. On the Primary Customer Information tab, at the bottom of the screen, there is a **Retail Conversion Cust?** field. Set this field to "Yes" to track the customer as a "Retail Conversion" customer.

- **Retail Conversion Cust?** – Yes/No field identifying if the customer is a Retail customer



Retail Inventory and Customer Reporting

TRANSACTION AUDIT TRAIL Report (**TRAUDRPT**) shows the Retail inventory information in the **RECEIVER** (purchases) section.

RECEIVER section:

- Retail Inv SW – Retail Inventory = Y or N
- Retail Inv Num – Retail Inventory Number
- Retail Inv Rem Value – Retail Remaining Value

DELIVERY section:

- Retail Conversion Cust?

RUN DATE: 05/10/18 HIGH TOUCH PAGE: 1
TIME: 10:52:44 Transaction Audit Trail TRAUDRPT

Transactions Date: Thursday 05/10/2018
Location: 1 Projected Turns: N

RECEIVER

PO#/ Recv#	Loc	Inv Indr	Prod Code	Manufacturer	Model#	Description	Retail Inv.	Retail Num	Retail Rem Value	Serial#	Alt ID	Actual Cost	Life	RegCash Price	Sale Price	Rate Code	--Weekly--- Rate/Term	--Monthly-- Rate/Term	Employee Last,Frst
N/A	1	RTO	AA	ABS ABS JEWELRY	AAAB512	AIRCONDITIONER AIR CONDITIONER	Y	AIRCOND-DY	0.00	111111	00125835	0.00	24	359.91	359.91	0978	9.99/ 78	39.99/ 18	****,****
		RTO	AD	AMA AMANA	ADAMANDG233AWW	FULL SIZE GAS DRYER FULL SIZE GAS DRYER	Y	FGASDR-DY	500.00	222222	00125836	279.95	24	587.58	587.58	1391	13.99/ 91	55.99/ 21	****,****
		RTO	AD	GEN GENERAL ELECTRI	ADGENGFD45ESSKWW	7.5', STEAM, FRONT LOAD ELEC FRONT LOAD DRYER	Y	FRLOADELEC-DY	600.00	33333333	00125837	0.00	24	0.00	0.00	24104	24.99/104	99.99/ 26	****,****

DELIVERY

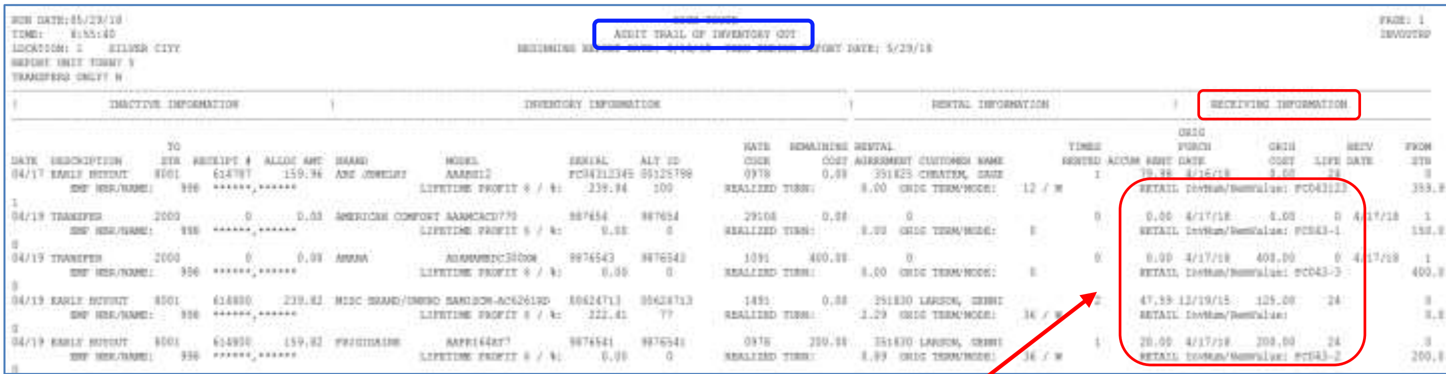
RA#	Location From	Location To	Acct# RT	Customer Customer 2 Address City ST Zip	Primary Ph Secondary Ph Retail Cust	Manufacturer	Model# Description	Serial#	Alt ID	Cost Actual	Cost Remain	Proj Turns	RA Date Next Due Pay Out	Rate/Term Weekly Monthly	Fees 1-Time	Fees Waiv ESP	Free Days Money	RcptTtl Balance CashPrc	Employee Last,Frst
0000351862	9001	1	1003226 2	ADAME, MARTHA 871 SULIVAN OGDEN UT 84404	(801)644-9883 N	COA COASTER CO	LTCOA3127 1 PIECE COFFEE/END TABLE	100277	00100277	103.00	103.00	2.5	5/10/18 5/17/18 5/30/18	10.99/ 24 43.99/ 5	0.00	1.10 0.00	0 0.00	0.00 0.00 131.88	****,****
0000351861			1003226 2	ADAME, MARTHA 871 SULIVAN OGDEN UT 84404	(801)644-9883 N	COA COASTER CO	LTCOA3127 1 PIECE COFFEE/END TABLE	100277	00100277	105.00	105.00	2.5	5/10/18 5/17/18 11/14/18	10.99/ 24 43.99/ 5	20.00	1.10 0.00	0 0.00	21.21 263.76 131.88	****,****
0000351863	1	9001	4000173 2	ABRAHAM, JUSTIN 110 S MAIN MAGNA UT 84044	(801)979-6330 Y	SYM SYMPHONIC	BMSYMMAXIMUS MAXIMUS PLUSH	4183	4183	0.00	0.00	0.0	5/10/18 5/10/18 5/29/19	24.99/ 52 39.99/ 12	20.00	2.50 0.00	0 0.00	21.24 1299.48 649.74	****,****

AUDIT TRAIL OF INVENTORY IN report (**INVINRPT**) shows the Retail Inventory number under the **RETAIL INFO** heading.

RUN DATE:04/19/18 HIGH TOUCH PAGE: 1
TIME: 10:02:51 AUDIT TRAIL OF INVENTORY IN INVINRPT
LOCATION: 1 SILVER CITY BEGINNING REPORT DATE: 4/16/18 THRU ENDING REPORT DATE: 4/17/18
TRANSFERS ONLY? N

RECEIVING INFORMATION					INVENTORY INFORMATION						RENTAL INFORMATION		RETAIL INFO
DESCRIPTION	RECEIVE DATE	FROM STR	ORIGINAL PURCH DT	ORIGINAL COST	LIFE	BRAND	MODEL	SERIAL	ALT ID	RATE CODE	RENTAL AGREEMENT	CUSTOMER NAME	INVENTORY NUM
RECEIVER	4/16/18	1	4/16/18	359.91	0	ABS JEWELRY	AAABS12	FC043	00125797	0978	0		FC04312345
	4/16/18	1	4/16/18	0.00	0	ABS JEWELRY	AAABS12	FC04312345	00125798	0978	0		FC043123
	4/16/18	1	4/16/18	400.00	0	HOTPOINT	ADHOTHTDX100EDWW	SA802539D	00125799	1091	0		FC043DY
	4/16/18	1	4/16/18	200.00	24	ASHLEY	LLASHL201944	00615043	00125800	0478	0		FC043DY
	4/16/18	1	4/16/18	100.00	0	SOUTHERN	LRSOU565-1/2-PWR	100276	00125801	1378	0		FC043DY
	4/17/18	1	4/17/18	279.95	0	AMANA	ADAMANDG233AWW	QA54321	00125802	1391	0		QA12345
	4/17/18	1	4/17/18	0.00	0	AMERICAN COMFORT	AAAMCACD770	987654	987654	29104	0		FC043-1
	4/17/18	1	4/17/18	200.00	0	FRIGIDAIRE	AAFRI64AT7	9876541	9876541	0978	0		FC043-2
	4/17/18	1	4/17/18	400.00	0	AMANA	ADAMAMEDC300XW	9876542	9876542	1091	0		FC043-3
	4/17/18	1	4/17/18	400.00	0	AMANA	ADAMAMEDC300XW	9876543	9876543	1091	0		FC043-3

AUDIT TRAIL OF INVENTORY OUT report (**INVOUTRP**) shows the **Retail Inventory Number** / **Retail Remaining Value** under the Receiving Information section of the report.



Detail view

RECEIVING INFORMATION

TIMES RENTED	ACCUM RENT	ORIG PURCH DATE	ORIG COST	LIFE	RECV DATE	FROM STR
1	79.98	4/16/18	0.00	24		0
	RETAIL InvNum/RemValue: FC043123					359.9
0	0.00	4/17/18	0.00	0	4/17/18	1
	RETAIL InvNum/RemValue: FC043-1					150.0
0	0.00	4/17/18	400.00	0	4/17/18	1
	RETAIL InvNum/RemValue: FC043-3					400.0
2	47.59	12/19/15	125.00	24		0
	RETAIL InvNum/RemValue:					0.0

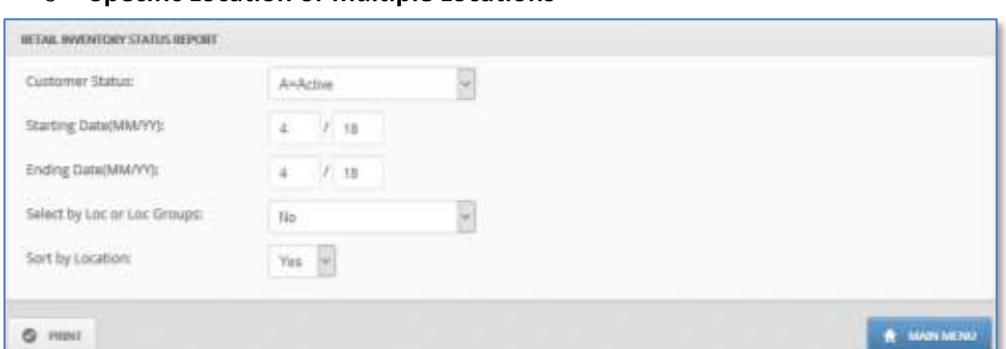
The **AUDIT TRAIL RECAP** Report shows the Retail Inventory Remaining Value.

AUDIT TRAIL RECAP

# UNITS	DESCRIPTION	ORIG COST	REMAIN COST	SOLD	EARLY BUYOUT	ACCUM RENT	TOTAL INCOME	REALIZED TURN	RETAIL INV REM VALUE
0	CREDIT	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	DONATION	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	GUARANTEED REPLACEMENT	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	MIKE TEST	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	Marketing	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	Marketing	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	PROMOTION/ADVERTISING	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	Store Break In	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

The **Retail Inventory Status** Report (**RETINVRP**) may be generated using any of the following options:

- **Customer Status** – Active, In-Active, or Both
- **Starting and Ending Dates –** By Month and Year
- **Specific Location or multiple Locations**



The **Retail Inventory Status** report consists of four individual sections**:**

1) **IDLE ITEMS**
2) **ITEMS THAT COLLECTED MONIES**
3) **INACTIVE ITEMS**
4) **RETAIL CONVERTED CUSTOMERS**

1) **IDLE ITEMS:** includes any inventory unit that is Active and Idle at the time the report is generated.

RUN DATE: 05/29/18
TIME: 13:20:32
Location: 1 SILVER CITY

IDLE ITEMS:

Unit #	Retail Inv #	Purchase Date	Retail Rem Value	#Days Idle	#Times On Rent	Total Monies Collected
00615234	FC043DY	12/11/13	200.00	0	3	0.00
100271	LAMP	4/11/18	80.00	0		0.00
100272	BRSLMP	4/11/18	50.00	0		0.00
100273	BRSLMP	4/11/18	50.00	0		0.00
100274	BRSLMP	4/11/18	50.00	0		0.00
100277	DY01234	4/20/18	200.00	0	1	10.99
100605	12345	4/06/18	250.00	0		0.00
222222	FGASDR-DY	5/10/18	500.00	0		0.00
333333333	FRLOADELEC-DY	5/10/18	600.00	0		0.00
418	FC043-0418	4/18/18	1000.00	0		0.00
41818	FC043-0418	4/18/18	500.00	0		0.00
AC1212	12345	5/23/18	75.00	0	1	0.00
AC1213	12345	5/23/18	100.00	0		0.00
AC1214	12345	5/23/18	100.00	0		0.00
AC1215	12345	5/23/18	100.00	0		0.00
AC1216	12345	5/23/18	100.00	0		0.00
AIR123		4/26/18	350.00	0		0.00
M44109363		12/09/14	0.00	18	3	0.00
SA802539D	FC043DY	4/16/18	400.00	0		0.00
WB1212	121212	5/23/18	150.00	0		0.00
WB1213	121212	5/23/18	150.00	0		0.00
WB1214	121212	5/23/18	150.00	0		0.00
			5155.00	18	8	10.99

Column descriptions:

- **Unit #** – The primary inventory identifier or serial number
- **Retail Inv #** – The Retail Inventory Number
- **Purchase Date** – Inventory unit original purchase date.
- **Retail Rem Value** – Remaining Value of the Retail Inventory unit, at the time received.
- **#Days Idle** – Number of days the inventory has been idle at the time the report is generated.
- **#Times On Rent** – The number of times the inventory has been on rent.
- **Total Monies Collected** – Total Rental income collected over the life of the inventory.

2) **ITEMS THAT COLLECTED MONIES:** includes any Retail Inventory that collected Rental, EPO, or Cash Sale income during the selected date range.

RUN DATE: 05/29/18
TIME: 13:20:58
Location: 1 SILVER CITY

HIGH TOUCH
INVENTORY STATUS REPORT

ITEMS THAT COLLECTED MONIES (5/18 thru 5/18)

Unit #	Retail Inv #	Purchase Date	Retail Rem Value	#Days Idle	#Times On Rent	Total Monies Collected	Current RA #	Customer Name	Retail Cust?
100277	DY01234	4/20/18	200.00	0	1	10.99	351862	ADAME, MARTHA	N
100278	DY123456	4/20/18	2000.00	0	1	29.99	351840	WALKER, JAMES	N
100600	1234	4/06/18	350.00	0	1	87.98	351761	ADAMS, DUSTIN	Y
100601	12345	4/06/18	250.00	0	1	110.99	351762	ALICEA, MELISSA	N
100602	12345	4/06/18	250.00	0	1	11.99	351763	ADAMS, DUSTIN	Y
4182	FC043-0418	4/18/18	1000.00	0	1	99.99	351852	ABARCA, ADELA	Y
9876541	FC043-2	4/17/18	200.00	0	1	179.82	351830	LARSON, GENNI	Y
9876542	FC043-3	4/17/18	400.00	0	1	197.82	351830	LARSON, GENNI	Y
FC043	FC04312345	4/16/18	359.91	0	1	789.21	351823	YSID, USER1	Y
FC04312345	FC043123	4/16/18	359.91	0	1	239.94	351825	CHEATEM, GAGE	N
FCQA54321		4/20/18	0.00	0	1	119.97	351839	CHEATEM, GAGE	N
QA54321	QA12345	4/17/18	587.58	0	1	111.98	351827	CHEATEM, GAGE	N
			5957.40	0	12	1990.67			

Column descriptions:

- **Unit #** – The primary inventory identifier or serial number.
- **Retail Inv #** – The Retail Inventory Number.
- **Purchase Date** – Inventory unit original purchase date.

- **Retail Rem Value** – The Remaining Value of the Retail Inventory unit, at the time received.
- **#Days Idle** – Number of days the inventory has been idle, if idle at the time the report is generated.
- **#Times On Rent** – The number of times the inventory has been on rent.
- **Total Monies Collected** – Is dependent on the Inventory Status at the time the report is generated.
  - If the inventory is **Active**, Total Monies Collected = Total Rental Income collected over the life of the inventory
  - If the Inventory is **In-Active**, Total Monies Collected = Total Rental income, plus any EPO or Cash Sale income collected over the life of the inventory.
- **Current RA #** – The most recent RA #, if the inventory is on rent, idle, active, or inactive as a result of an EPO at the time the report is generated.
- **Customer Name** – Primary customer name linked to the Current RA #.
- **Retail Cust?** – Based on the Current RA # above. This field will be set to **Yes**, if this is a Retail Converted Customer and **No** if they are not.
- **RA Date** – The rental agreement date linked to the Current RA #.
- **MTD Monies Collected** – Is dependent on the Inventory Status at the time the report is generated.
  - If the inventory is **Active**, MTD Monies Collected = Total Rental Income collected during the months in the selected date range.
  - If the Inventory is **In-Active**, MTD Monies Collected = Total Rental income, plus any EPO or Cash Sale income collected during the months in the selected date range.

3) **INACTIVE ITEMS**: includes retail inventory that became inactive during any of the months in the selected date range.

RUN DATE: 05/29/18 HIGH
TIME: 13:20:58 INVENTORY S
Location: 1 SILVER CITY

INACTIVE ITEMS (5/18 thru 5/18):

Unit #	Retail Inv #	Purchase Date	Retail Rem Value	#Days Idle	#Times On Rent	Total Monies Collected	Inactive Date	Inactive Reason
100277	DY01234	4/20/18	200.00	0	1	10.99	5/10/18	CAN'T AFFORD
100600	1234	4/06/18	350.00	0	1	87.98	5/29/18	CHARGEOFF
AC1212	12345	5/23/18	75.00	0	1	0.00	5/23/18	CAN'T AFFORD
FCQA54321		4/20/18	0.00	0	1	119.97	5/29/18	CHARGEOFF
			625.00	0	4	218.94		

Column descriptions:
- **Unit #** – The primary inventory identifier or serial number.
- **Retail Inv #** – The Retail Inventory Number.
- **Purchase Date** – Inventory unit original purchase date.
- **Retail Rem Value** – The Remaining Value of the Retail Inventory unit, at the time received.
- **#Days Idle** – The number of days the inventory has been idle, if the inventory is idle at the time the inventory was inactivated.
- **#Times On Rent** – The number of times the inventory has been on rent at the time the inventory was inactivated.
- **Total Monies Collected** – Total Rental Income, EPO, or Cash Sale Income collected over the life of the inventory.
- **Inactive Date** – Date the inventory became inactive.
- **Inactive Reason** – Will be populated as follows
  - If the inventory unit was Transferred, the Inactive Reason will be TRANSFER.
  - If the inventory unit was Charged Off, the Inactive Reason will show the Charge Off Reason selected at the time of Charge Off.

4) **RETAIL CONVERTED CUSTOMERS (ACTIVE, INACTIVE or BOTH):** May include Active, Inactive, or BOTH, depending on the selection of the *Retail Conversion Customer* field when the report is generated.

RUN DATE: 05/29/18
TIME: 13:20:58
Location: 1 SILVER CITY

HIGH TOUCH
INVENTORY STATUS REPORT

RETAIL CONVERTED CUSTOMERS (ACTIVE & INACTIVE)

Customer Name	RA #	RA Date	Unit #	Retail Inv #	Retail Rem Value	Total Monies Collected	Active/ Inactive	Inact Date
PINTO, KEVIN	277160	4/15/16	9724453248		0.00	0.00	INACTIVE	6/11
PINTO, KEVIN	277161	4/15/16	00624733		0.00	0.00	INACTIVE	6/11
PINTO, KEVIN	277162	4/15/16	00624736		0.00	0.00	INACTIVE	6/16
PINTO, KEVIN	338958	5/13/16	00625263		0.00	0.00	INACTIVE	5/19
PINTO, KEVIN	338959	5/13/16	00621956		0.00	0.00	INACTIVE	6/14
PINTO, KEVIN	339145	5/19/16	00625263		0.00	0.00	INACTIVE	6/18
PINTO, KEVIN	340060	6/18/16	00624736		0.00	0.00	INACTIVE	11/21
PINTO, KEVIN	340063	6/18/16	00621956		0.00	0.00	INACTIVE	8/23
PINTO, KEVIN	351740	3/30/18			0.00	0.00	INACTIVE	3/30
PINTO, KEVIN	351741	3/30/18			0.00	0.00	INACTIVE	3/30
PINTO, KEVIN	351742	4/02/18			0.00	0.00	INACTIVE	4/02
PINTO, KEVIN	351743	4/02/18			0.00	0.00	INACTIVE	4/02
PINTO, KEVIN	351744	4/02/18			0.00	0.00	INACTIVE	4/02
PINTO, KEVIN	351747	4/02/18			0.00	0.00	ACTIVE	
AALBU, MICHELLE	351622	10/17/17	00615887		0.00	0.00	ACTIVE	
AALBU, MICHELLE	351627	10/20/17	00115520		0.00	0.00	INACTIVE	11/22
AALBU, MICHELLE	351676	11/21/17			0.00	0.00	INACTIVE	5/16
AALBU, MICHELLE	7001887	10/20/17			0.00	0.00	ACTIVE	
AARON, CHRIS	351485	7/20/17	M54215363		0.00	0.00	INACTIVE	9/01
AARON, CHRIS	351486	7/20/17			0.00	0.00	ACTIVE	
AARON, CHRIS	1002419	7/20/17			0.00	0.00	INACTIVE	9/01
ABARCA, ADELA	351493	7/21/17	C33730963		0.00	0.00	ACTIVE	
ABARCA, ADELA	351494	7/21/17			0.00	0.00	ACTIVE	

Column descriptions:

- **Customer Name** – The primary customer name.
- **RA #** – Rental Agreement number.
- **RA Date** – Rental Agreement date.
- **Unit #** – Primary inventory identifier or serial number.
- **Retail Item #** – The Retail Inventory Number.
- **Retail Rem Value** – The Remaining Value of the Retail Inventory unit at the time received.
- **Total Monies Collected** – Is dependent on the Inventory Status at the time the report is generated.
  - If the inventory is **Active**, Total Monies Collected = Total Rental Income collected over the life of the inventory
  - If the Inventory is **In-Active**, Total Monies Collected = Total Rental income, plus any EPO or Cash Sale income collected over the life of the inventory.
- **Active/Inactive** – Customers Status.
  - Will be set to ACTIVE if the customer has at least one active rental agreement.
  - Will be set to INACTIVE if the customer has at least one inactive rental agreement and no active rental agreements.
- **Inactive Date** – Rental agreement inactive date.
- **Inactive Reason** – Will be populated as follows:
  - If the inventory unit was Transferred, the Inactive Reason will be TRANSFER.
  - If the inventory unit was Charged Off, the Inactive Reason will show the Charge Off Reason selected at the time of Charge Off.

Receive New and Returned/Refurbished Units

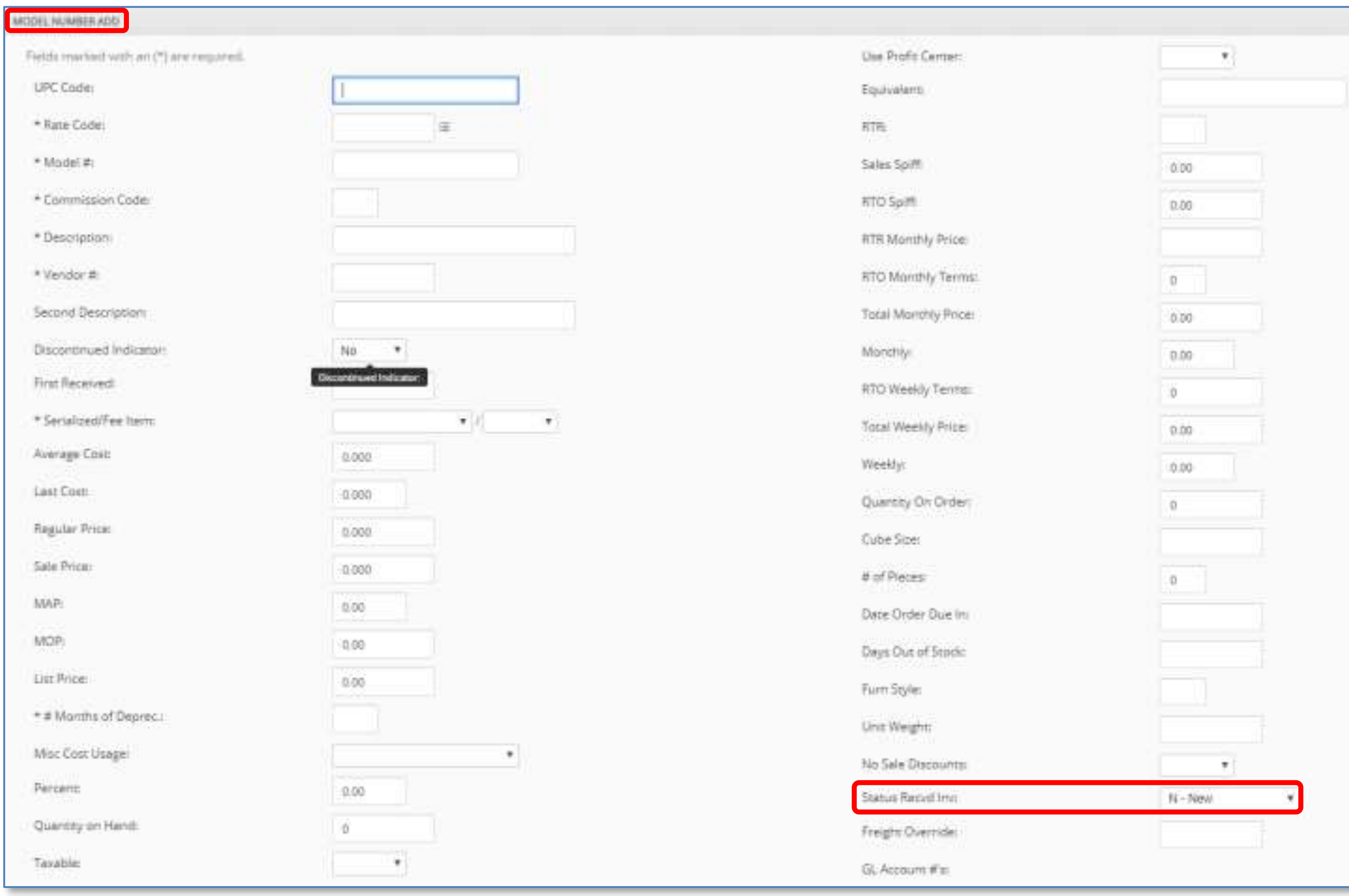
An indicator exists in each Model Number record to allow receiving inventory in with an **Inventory Status** of ***New*** or ***Returned/Refurbished***. Please reference the **Add a Model Number** section of **Chapter 16: Home Office and Setup** for additional information.

Adding or Updating a Model Number (ITEMMNTS)

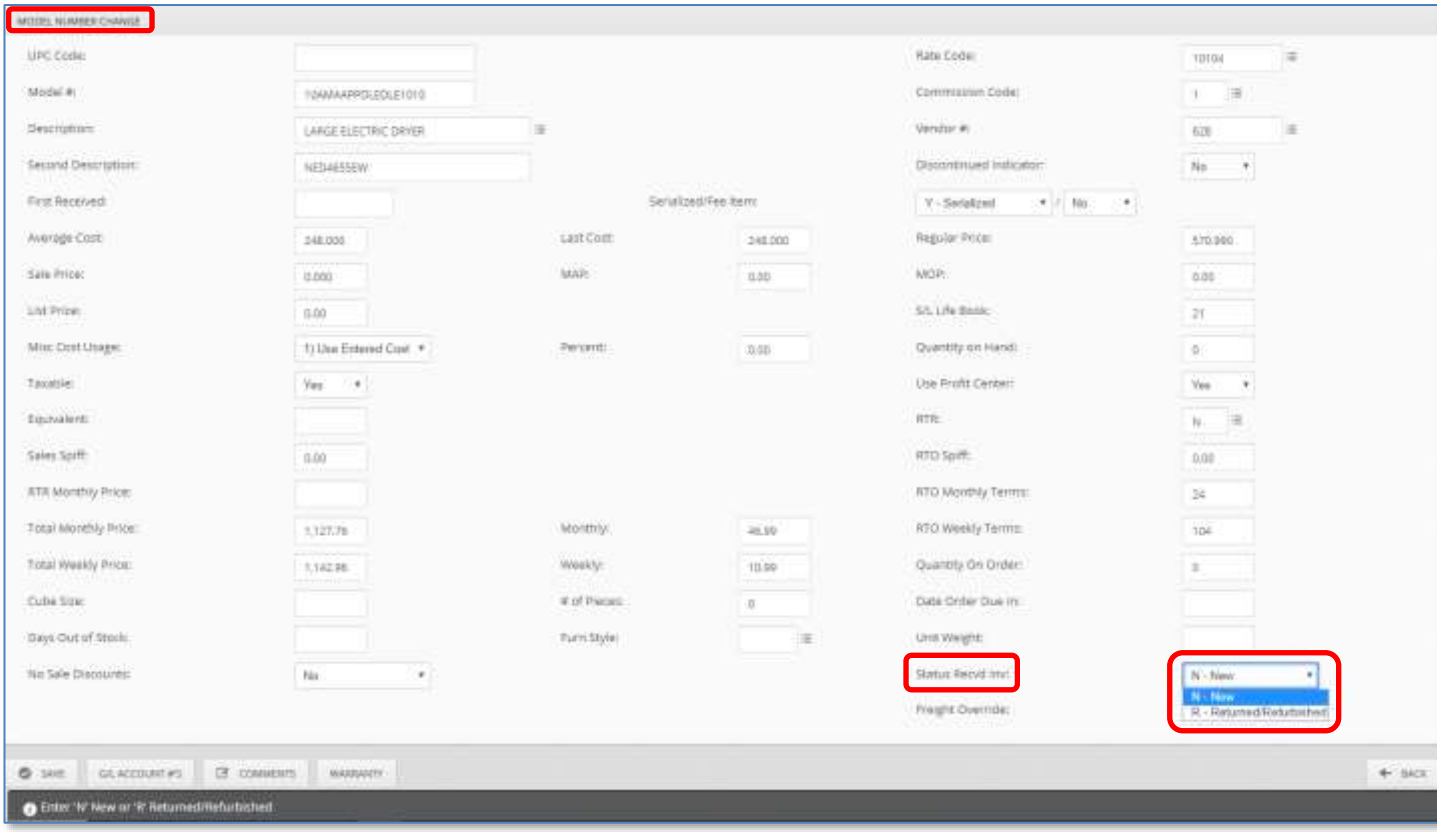
From the **ITEMMNTS** screen, the ***Status Received Inv*** is shown on the Model Number. This indicator has **two** available selections:

- **N = New**
- **R = Returned/Refurbished**

The ***Status Received Inv*** indicator will automatically default to **New** when entering the screen to "add" a Model Number.



The ***Status Received Inv*** indicator can also be modified to **New** or **Returned/Refurbished** upon entering the screen to edit or change the Model Number.



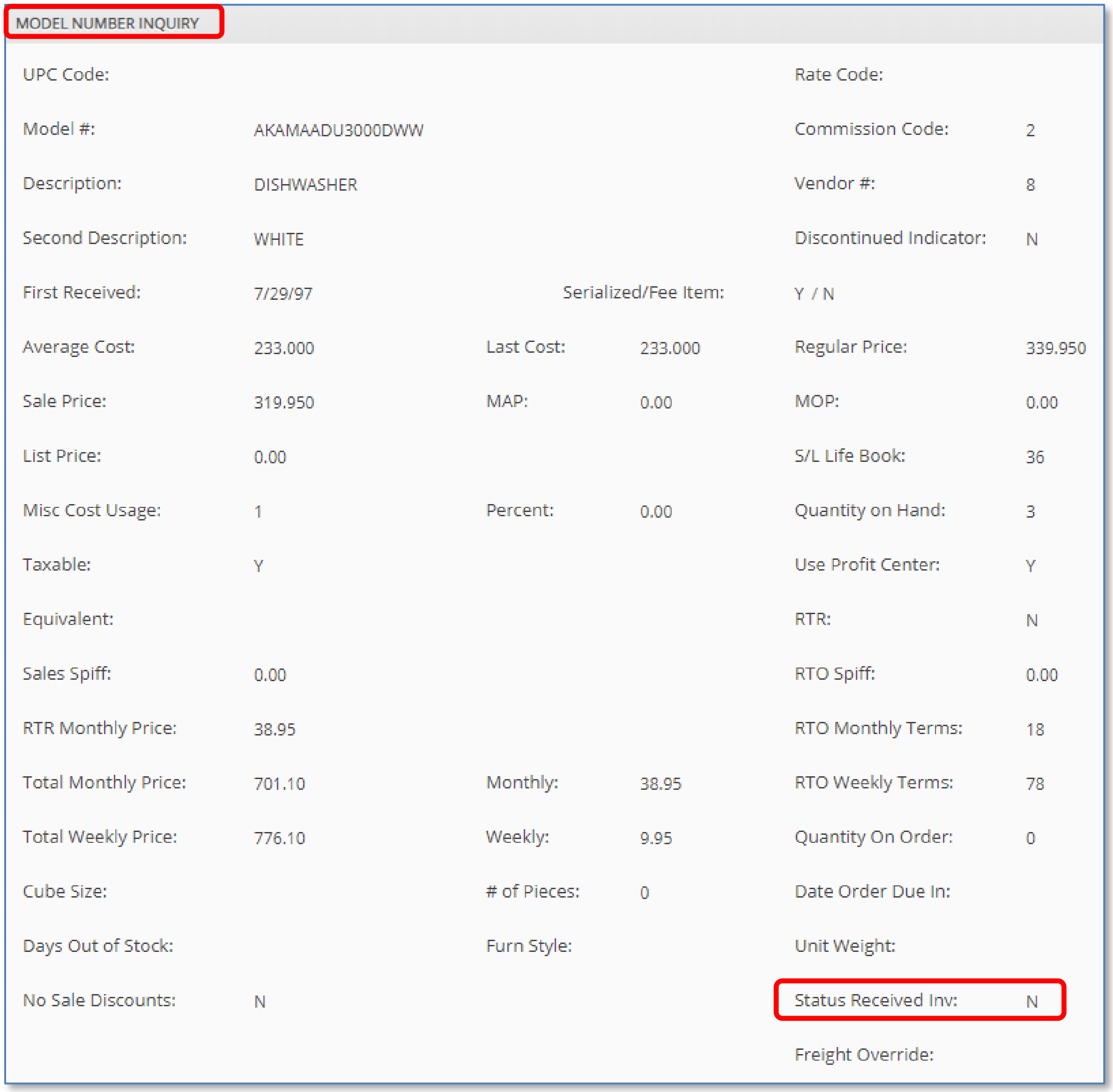
*Please Note: You may update the **Status Received Inv** indicator to **N – New** or **R – Returned/Refurbished**.*

Receiving in Inventory and Model Number Inquiry

The indicator will be displayed while receiving inventory in from the ***New Inventory Purchase Order*** (**POINLOAD**) or ***Manual Receiver Input*** (**RECEIVE**) programs.

- When an item is being received into the cynergi|suite store system, the indicator will automatically populate the ***Inventory Status*** field based upon the ***Status Received Inv*** indicator flag of the Model Number.
- *Please Note: The **Status Received Inv** indicator on the Model Number that is received in will also become the **Inventory Status** field on the actual inventory unit.*

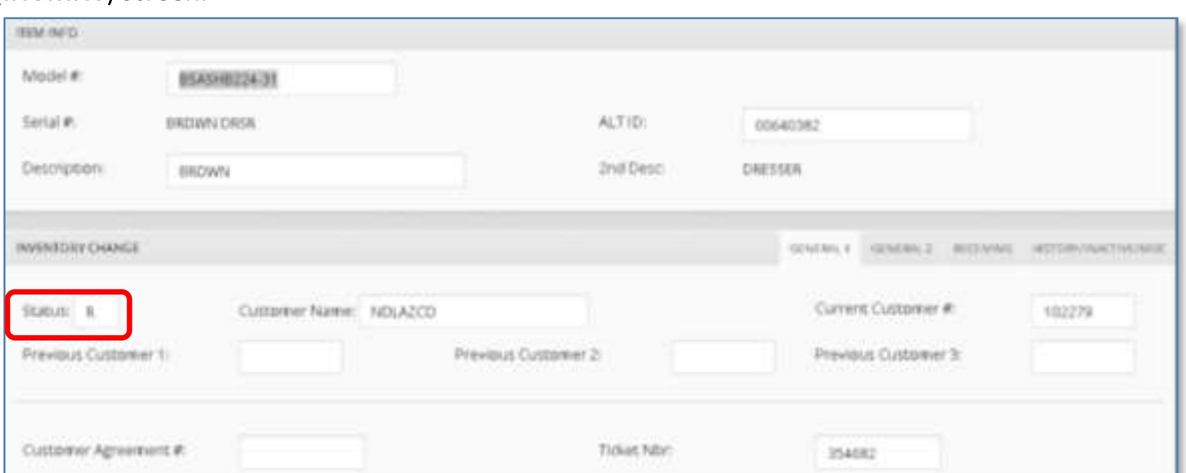
The ***Model Number Inquiry*** screen that appears prior to the item being received into the cynergi|suite system will display the ***Status Received Inv*** indicator flag.



MODEL NUMBER INQUIRY

UPC Code:				Rate Code:	
Model #:	AKAMAADU3000DWW			Commission Code:	2
Description:	DISHWASHER			Vendor #:	8
Second Description:	WHITE			Discontinued Indicator:	N
First Received:	7/29/97		Serialized/Fee Item:	Y / N	
Average Cost:	233.000	Last Cost:	233.000	Regular Price:	339.950
Sale Price:	319.950	MAP:	0.00	MOP:	0.00
List Price:	0.00			S/L Life Book:	36
Misc Cost Usage:	1	Percent:	0.00	Quantity on Hand:	3
Taxable:	Y			Use Profit Center:	Y
Equivalent:				RTR:	N
Sales Spiff:	0.00			RTO Spiff:	0.00
RTR Monthly Price:	38.95			RTO Monthly Terms:	18
Total Monthly Price:	701.10	Monthly:	38.95	RTO Weekly Terms:	78
Total Weekly Price:	776.10	Weekly:	9.95	Quantity On Order:	0
Cube Size:		# of Pieces:	0	Date Order Due In:	
Days Out of Stock:		Furn Style:		Unit Weight:	
No Sale Discounts:	N			Status Received Inv:	N
				Freight Override:	

The **Status** of the inventory unit will display "**N**" or "**R**" in the **Inventory Change** section of the Inventory Maintenance (**INVMNT**) screen.



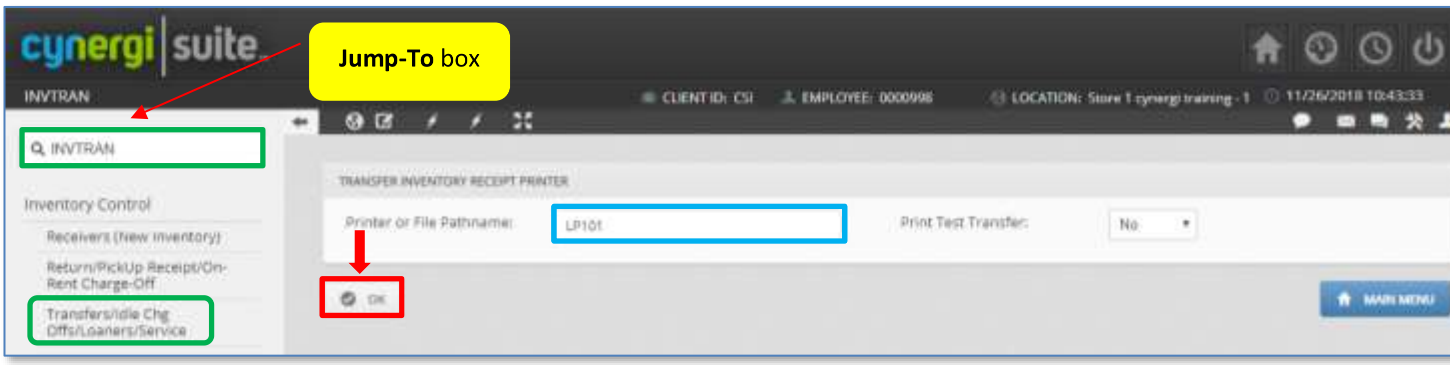
Charge Off Idle Inventory Unit

*<u>Please Note</u>: Idle Inventory Charge Offs are done by transferring the unit from the "**Idle**" location to a "**Charge Off**" location.*

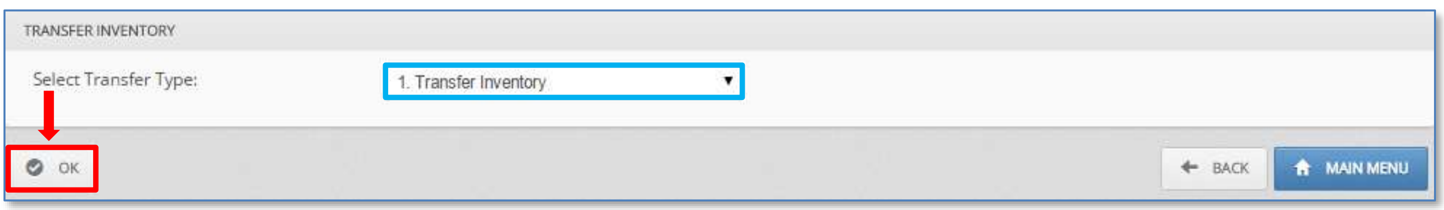
To charge off an idle Unit from one store to another, type **INVTRAN** into the ***Jump-To*** box and press the **<u>TAB</u>** or **<u>ENTER</u>** key. You may also select it from your company's cynergi|suite menu.
<u>Please Note</u>: Your menu option may be different than what is shown below.

The first screen will display the default printer name.

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

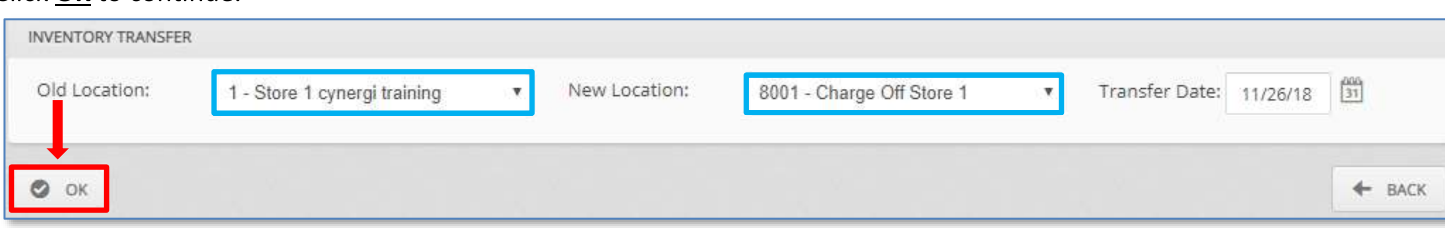


The default selection <u>1. Transfer Inventory</u> will already be set. Click **<u>OK</u>** to continue.

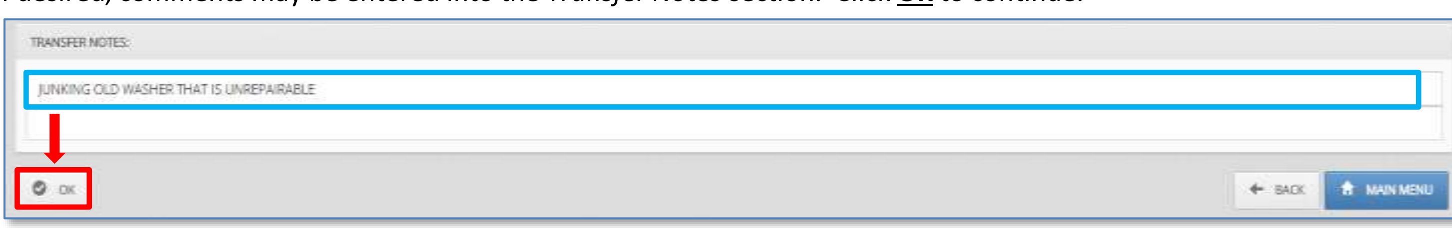


Use the pick list to select the "*Old Location*" and the "*New Location*." The "*Old Location*" should be your store's idle location and the "New Location" should be the **Charge Off location** of the store to which the unit is being transferred.
<u>Please Note</u>: The Charge Off Location for your company may be set up differently from this example.

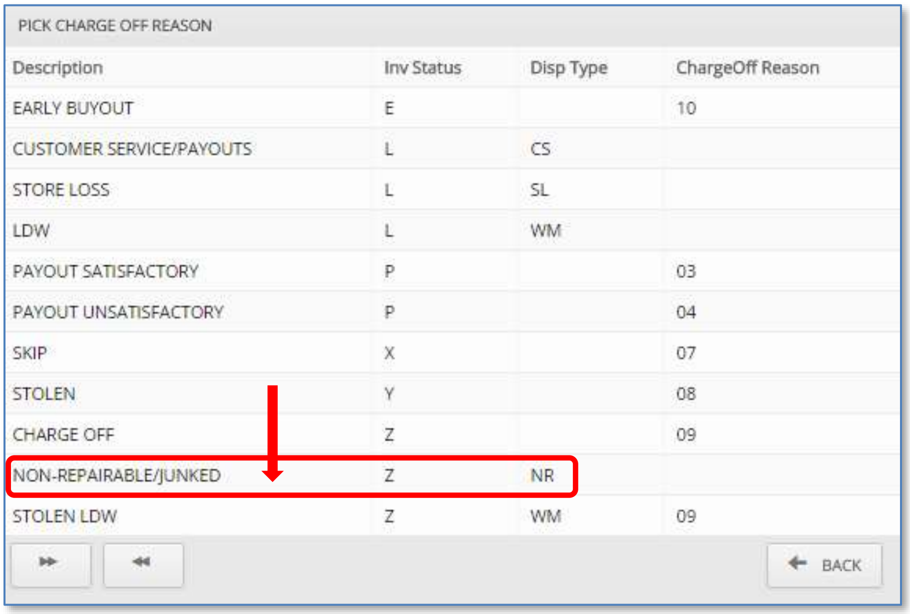
Click **<u>OK</u>** to continue.



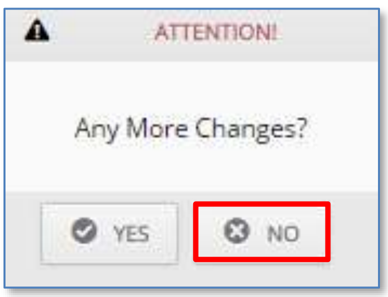
If desired, comments may be entered into the *Transfer Notes* section. Click **<u>OK</u>** to continue.



Choose the *Charge Off* reason from the pick list. To select the charge off reason, click anywhere on the line.

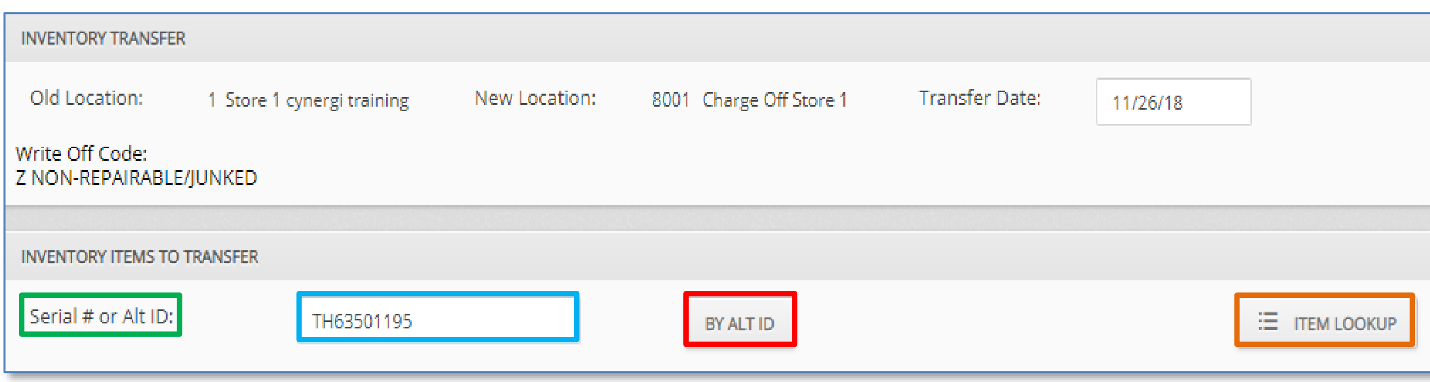


At the *Any More Changes* prompt, click **NO** to continue. If changes are needed, then click **YES** to go back.

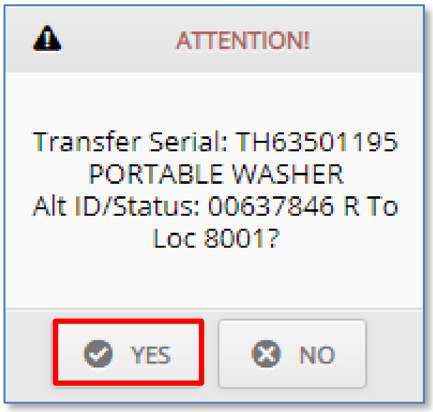


Enter the **Serial Number** or **Alt ID** of the unit that is being charged off.

- If using the *Serial Number*, key the **Serial Number** into the box and press **ENTER**.
- If using the *Alt ID*, key the **Alt ID** number into the box and then click the **BY ALT ID** button.
- If you are unsure of either, *Item Lookup* may also be used to search and choose the inventory to be transferred.

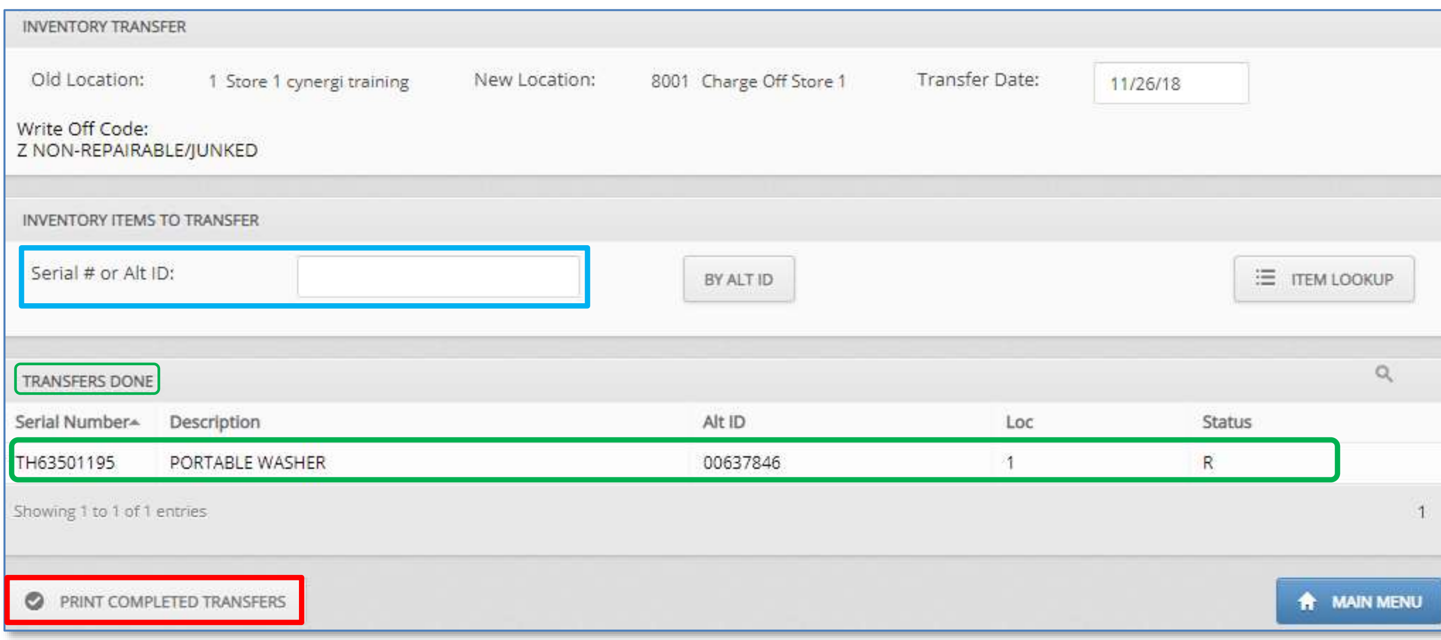


The Transfer confirmation message will appear displaying the unit *Serial Number* and *Description*. Click **YES** to confirm.



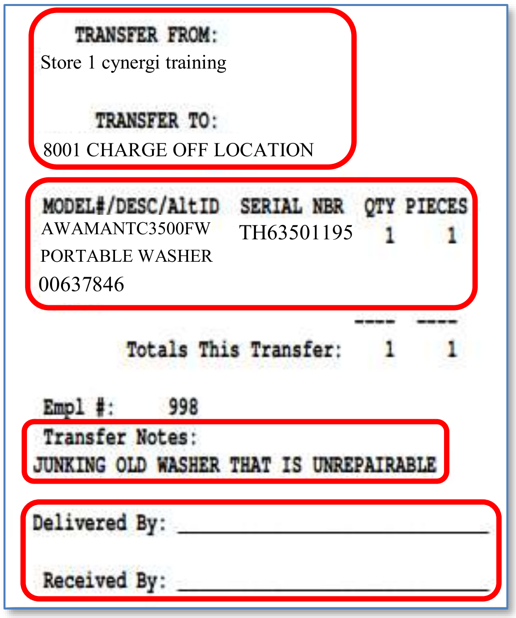
Upon confirming the transfer message, please note the following:

- The completed charge off (transfer) will be displayed at the bottom of the screen in the *Transfers Done* section.
- Additional units may be charged off by keying in the **Serial Number** or **Alt ID** number and then repeating the previous steps.
- When all units have been charged off (transferred), click the **PRINT COMPLETED TRANSFERS** button.



The *Charge Off Transfer Receipt* will print with following information:

- *Transfer From* and *Transfer To* locations
- Inventory *Model number*, *Description*, *Serial Number*, and *Alt ID*
- *Transfer Notes*
- Signature lines *Delivered By* and *Received By*



TRANSFER FROM:
Store 1 cynergi training

TRANSFER TO:
8001 CHARGE OFF LOCATION

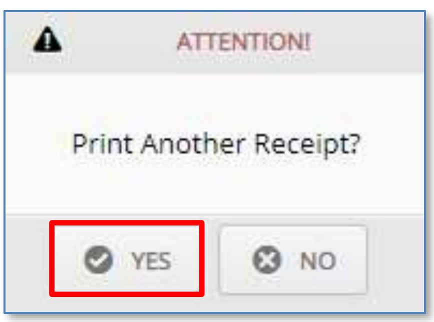
MODEL#/DESC/AltID	SERIAL NBR	QTY	PIECES
AWAMANTC3500FW PORTABLE WASHER 00637846	TH63501195	1	1
Totals This Transfer:		1	1

Empl #: 998
Transfer Notes:
JUNKING OLD WASHER THAT IS UNREPAIRABLE

Delivered By: ____________________

Received By: ____________________

At the *Print Another Receipt* prompt, click **YES** if you need another copy or click **NO** to go back to the beginning of the **INVTRAN** screen (Inventory Transfer) to key in a new transfer.

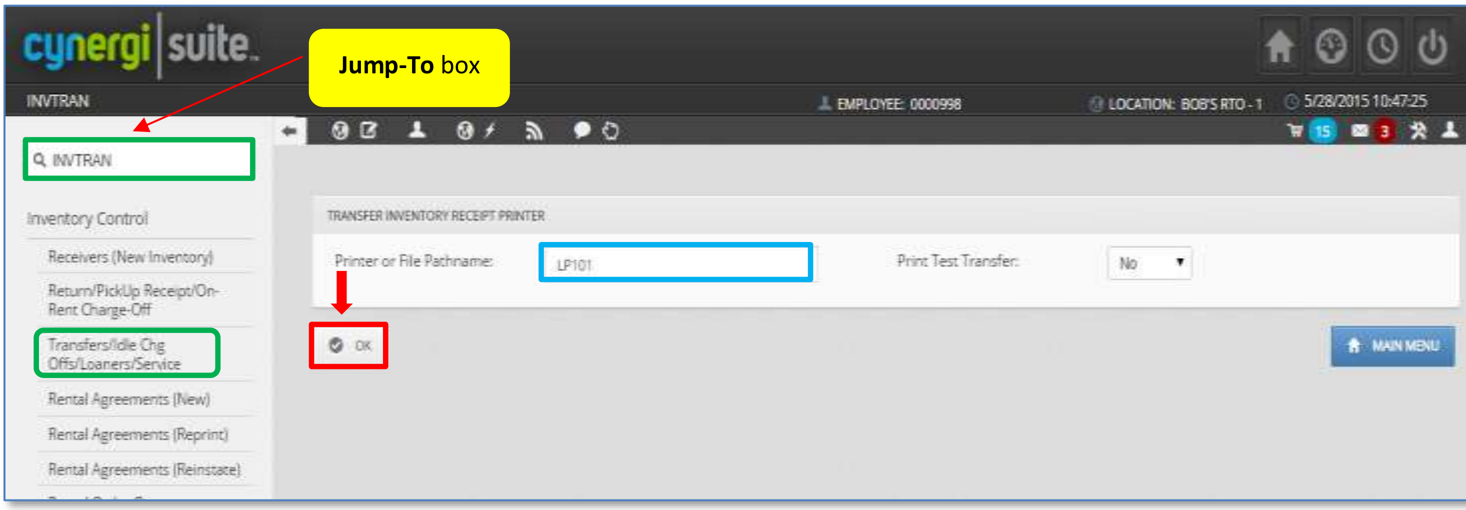


Idle Inventory Transfer from Store to Store

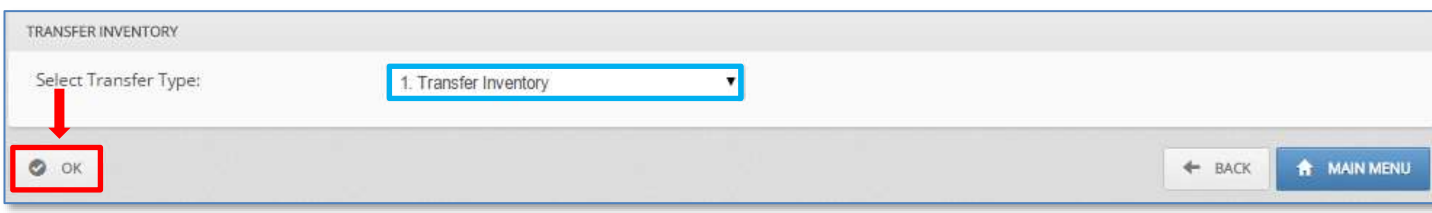
To transfer an idle unit from one store to another, type **INVTRAN** into the ***Jump-To*** box and press the **TAB** or **ENTER** key. You may also select it from your company's cynergi|suite menu.
Please Note: Your menu option may be different than what is shown below.

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 and click **OK** to continue.

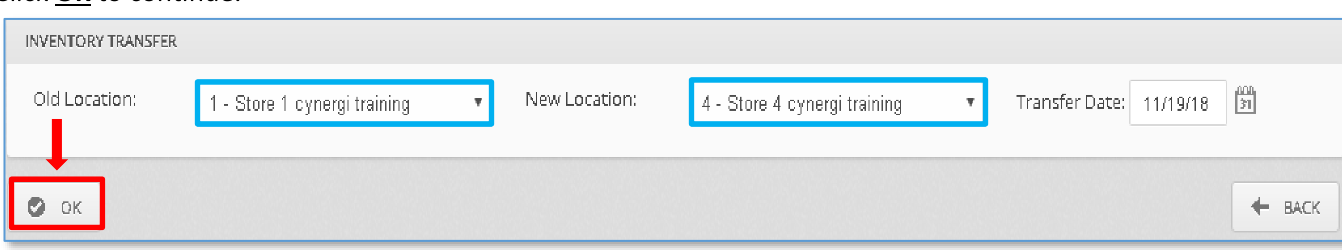


The default selection 1. Transfer Inventory will already be set. Click **OK** to continue.

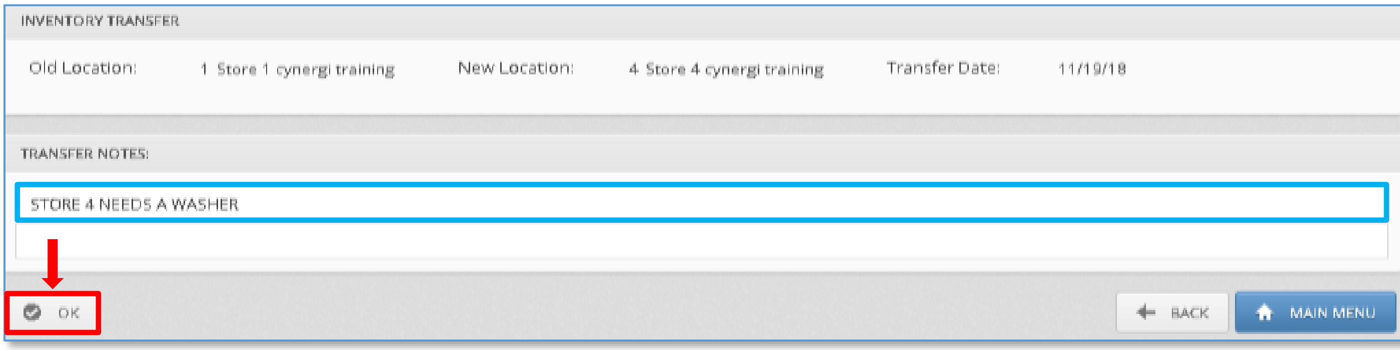


Use the pick list to select the ***Old Location*** and the ***New Location***. The ***Old Location*** should be your store's idle location and the ***New Location*** should be the idle location of the store to which the unit is being transferred.

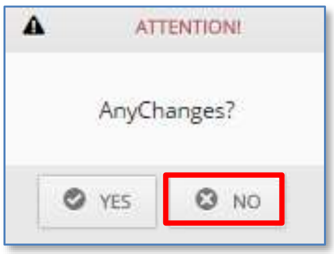
Click **OK** to continue.



If desired, comments may be entered into the *Transfer Notes* section. Click **OK** to continue.

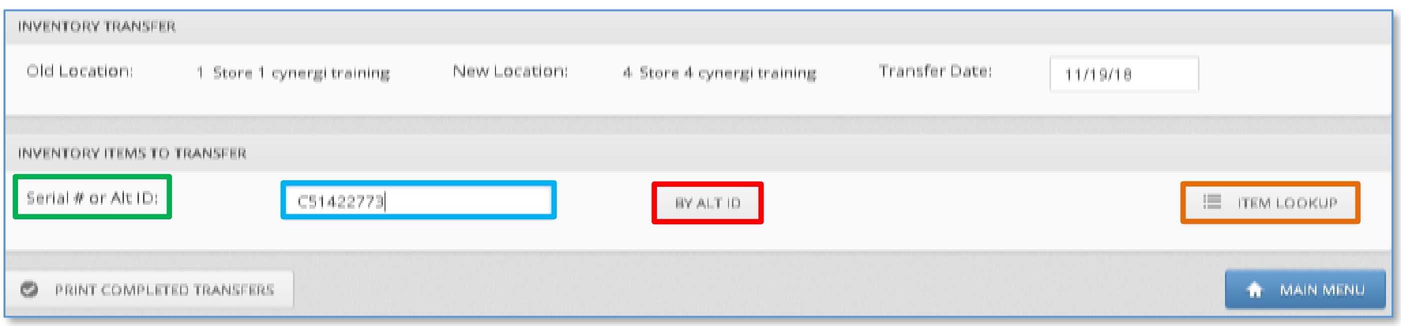


At the *Any Changes* prompt, click **NO** to continue. If changes are needed, then click **YES** to go back.

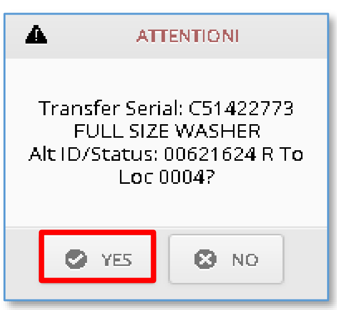


Enter the **Serial Number** or **Alt ID** of the unit that is being transferred.

- If using the *Serial Number*, key the **Serial Number** into the box and press **ENTER**.
- If using the *Alt ID*, key the **Alt ID** number into the box and then click the **BY ALT ID** button.
- If you are unsure of either, *Item Lookup* may also be used to search and choose the inventory to be transferred.

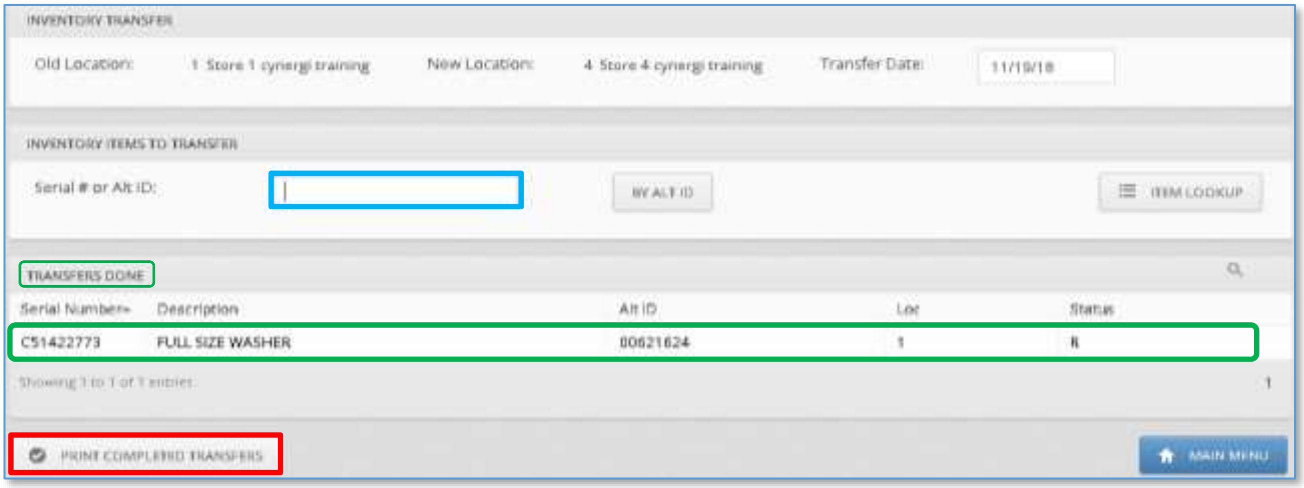


The Transfer confirmation message will appear displaying the unit *Serial Number* and *Description*. Click **YES** to confirm.

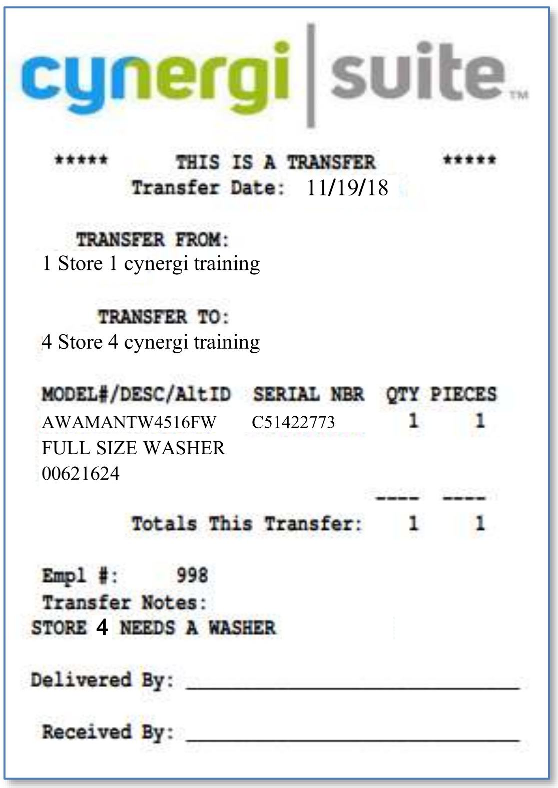


Upon confirming the transfer message, please note the following:

- The completed transfer will be displayed at the bottom of the screen in the *Transfers Done* section.
- Additional units may be transferred by keying in the **Serial Number** or **Alt ID** number and then repeating the previous steps.
- When all units have been transferred, click the **PRINT COMPLETED TRANSFERS** button.



The *Transfer Receipt* will print on the printer with the signature lines *Delivered By* and *Received By*.


cynergi | suite

***** THIS IS A TRANSFER *****
Transfer Date: 11/19/18

TRANSFER FROM:
1 Store 1 cynergi training

TRANSFER TO:
4 Store 4 cynergi training

MODEL#/DESC/AltID	SERIAL NBR	QTY	PIECES
AWAMANTW4516FW FULL SIZE WASHER 00621624	C51422773	1	1
Totals This Transfer:		1	1

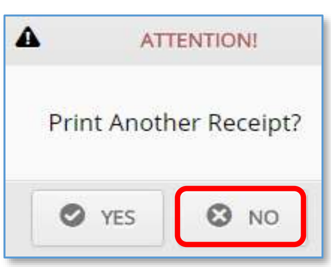
Empl #: 998
Transfer Notes:
STORE 4 NEEDS A WASHER

Delivered By: ______________________________

Received By: ______________________________

<u>Please Note</u>: If transfers are NOT made directly to the Transfer-In store but to an idle transfer store sub-location, then the Transfer-In store will need to initiate the transfer from their idle store sub-location to their idle location.

At the *Print Another Receipt* prompt, click **<u>NO</u>** if another receipt is not needed. Press the **<u>YES</u>** button if another receipt is needed.



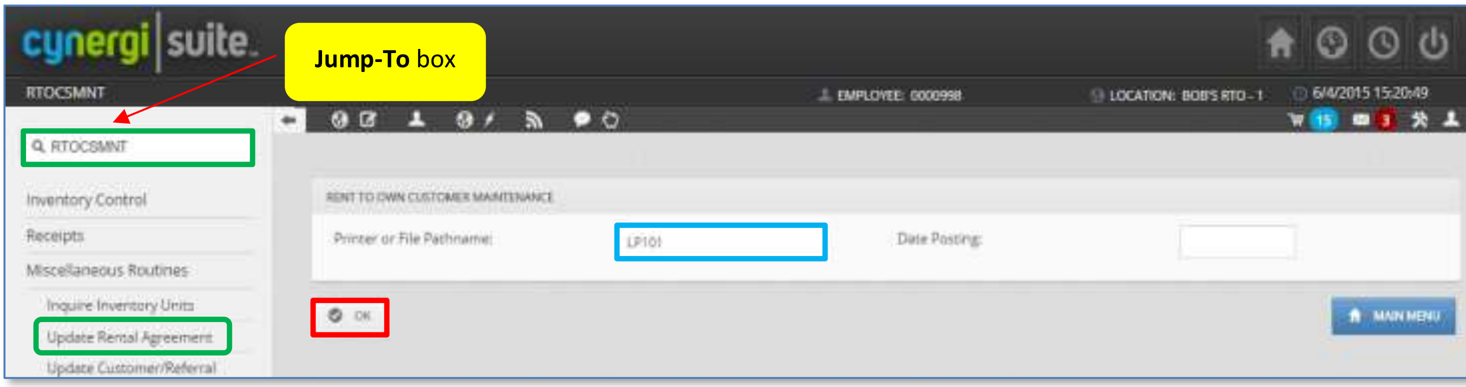
On Rent Inventory Transfer from Store to Store

On rent transfers are typically done when a customer with active agreements in one store would like to make their payments at a different store. This typically is referred to as a *Customer Transfer*. However, in the cynergi|suite store system, it is a *Rental Agreement Transfer*. A Rental Agreement change/update is required to transfer (reassign) the agreement and inventory to a different store.

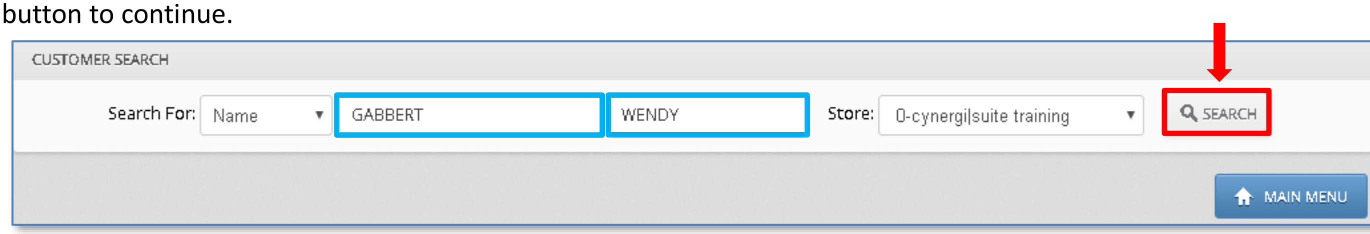
To transfer a Rental Agreement from one store to another, type **RTOCSMNT** into the ***Jump-To*** box and press the **TAB** or **ENTER** key. You may also select it from your company's cynergi|suite menu.
Please Note: Your menu option may be different than what is shown below.

The first screen will display the default printer name.

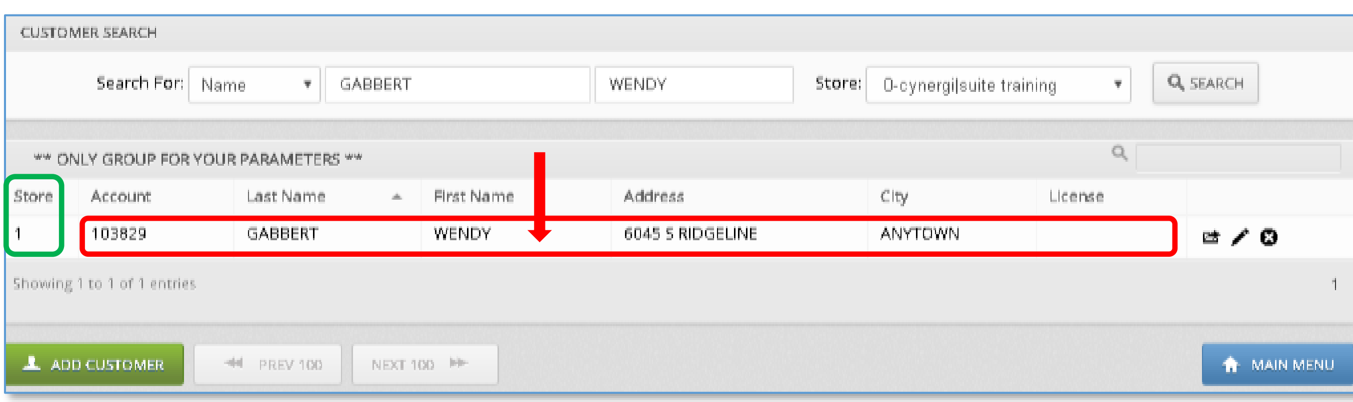
- If the printer name is correct click **OK** to continue.
- If you wish to print to a different printer, enter the printer name you wish to print to and click **OK** to continue.



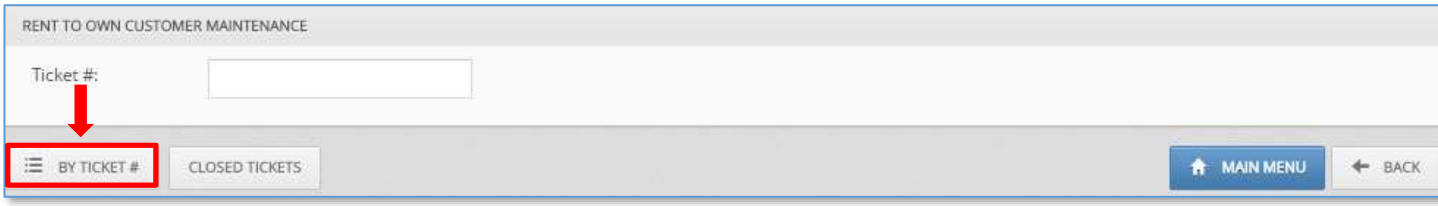
Enter the Last Name first, then the First Name, and then select the "**0**" Location, for Store Search box. Click the **SEARCH** button to continue.



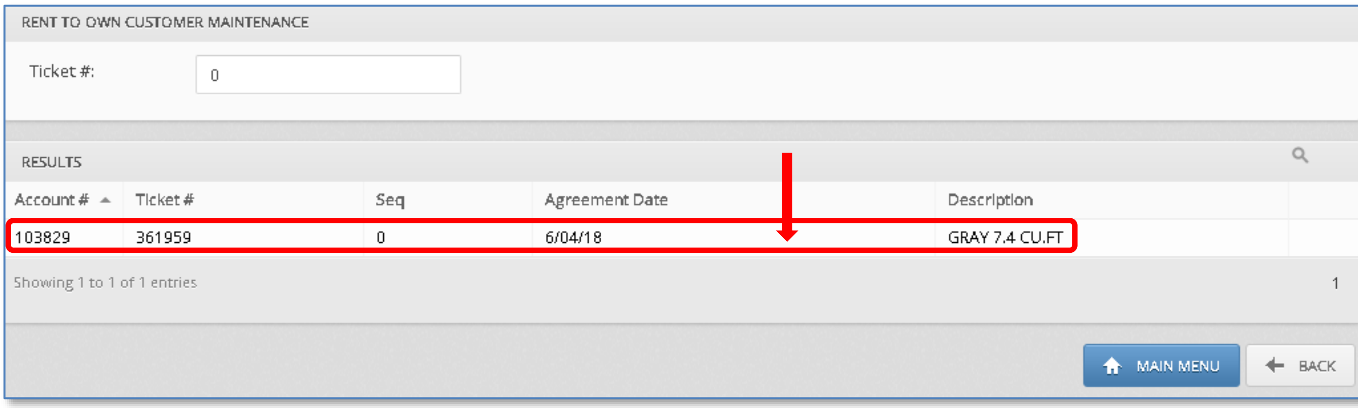
Click anywhere on the line displaying the customer information to select the customer.
Please Note: This example is displaying a Store 1 customer that will transfer their agreement to Store 2.



Click the **BY TICKET #** button to display the customer's rental agreements.

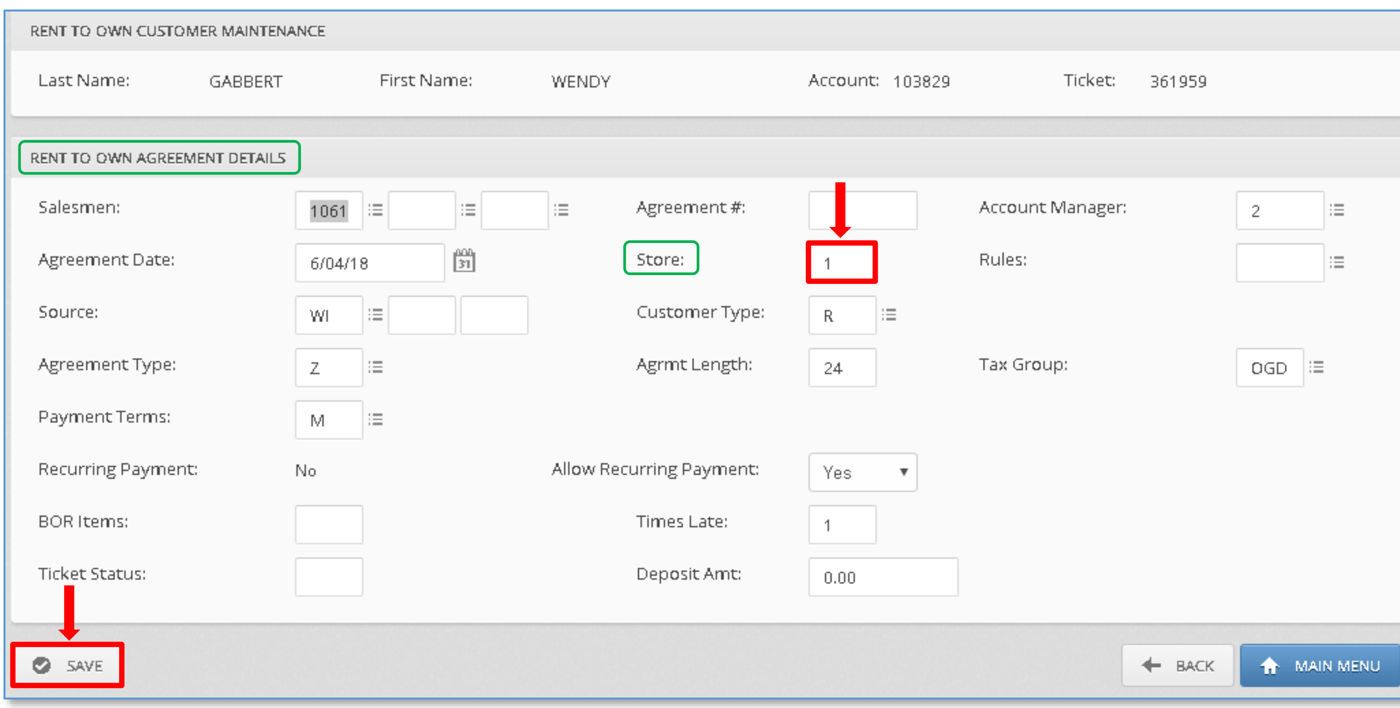


Click on the line displaying the rental agreement to be transferred.



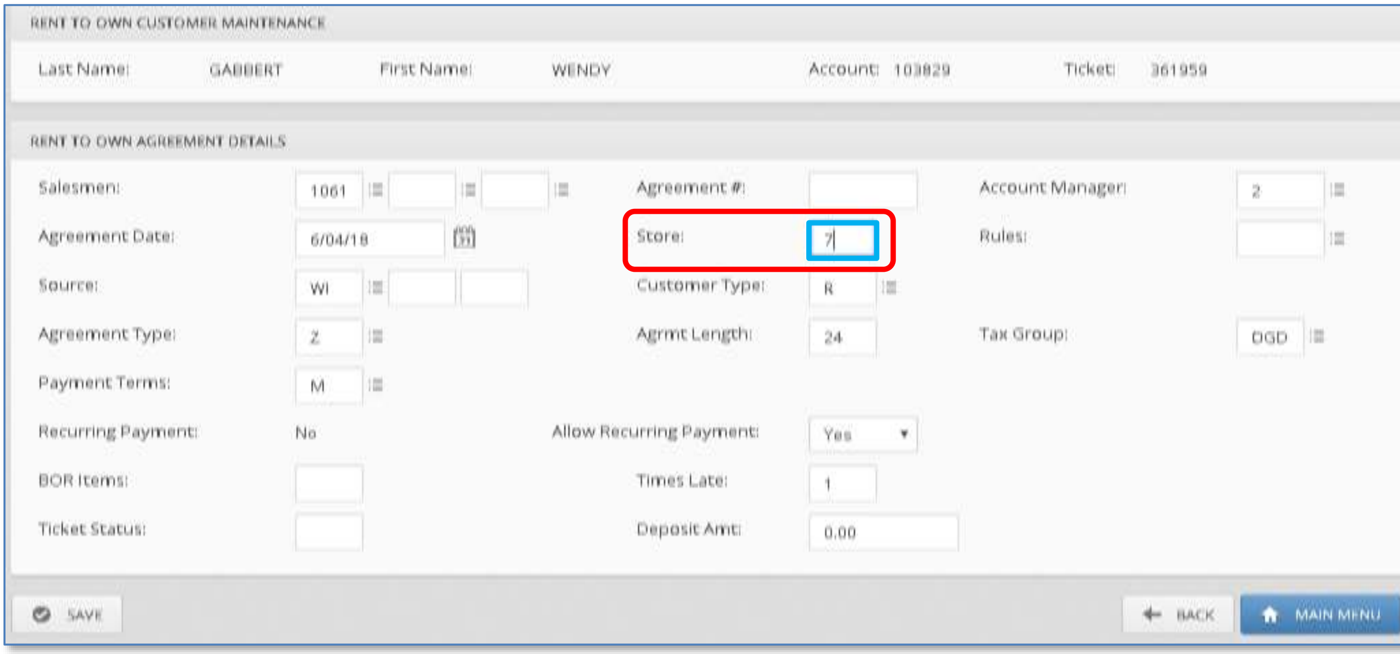
The *Rent to Own Agreement Details* screen will display the "Current Store" the agreement is assigned to. <u>Change the current store number to the new store number where the agreement is being transferred to</u>.

Click **SAVE** to continue.

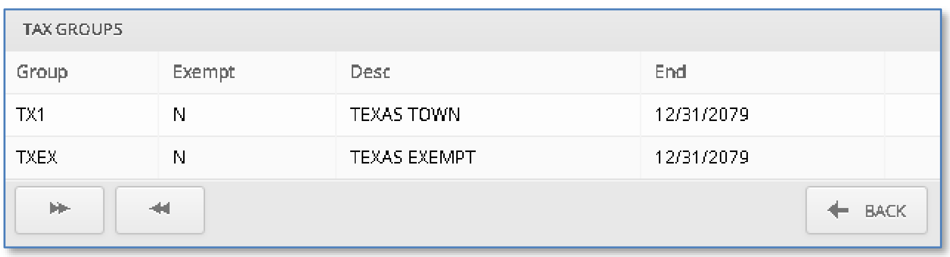


Example of changing an Agreement from Store 1 to Store 7

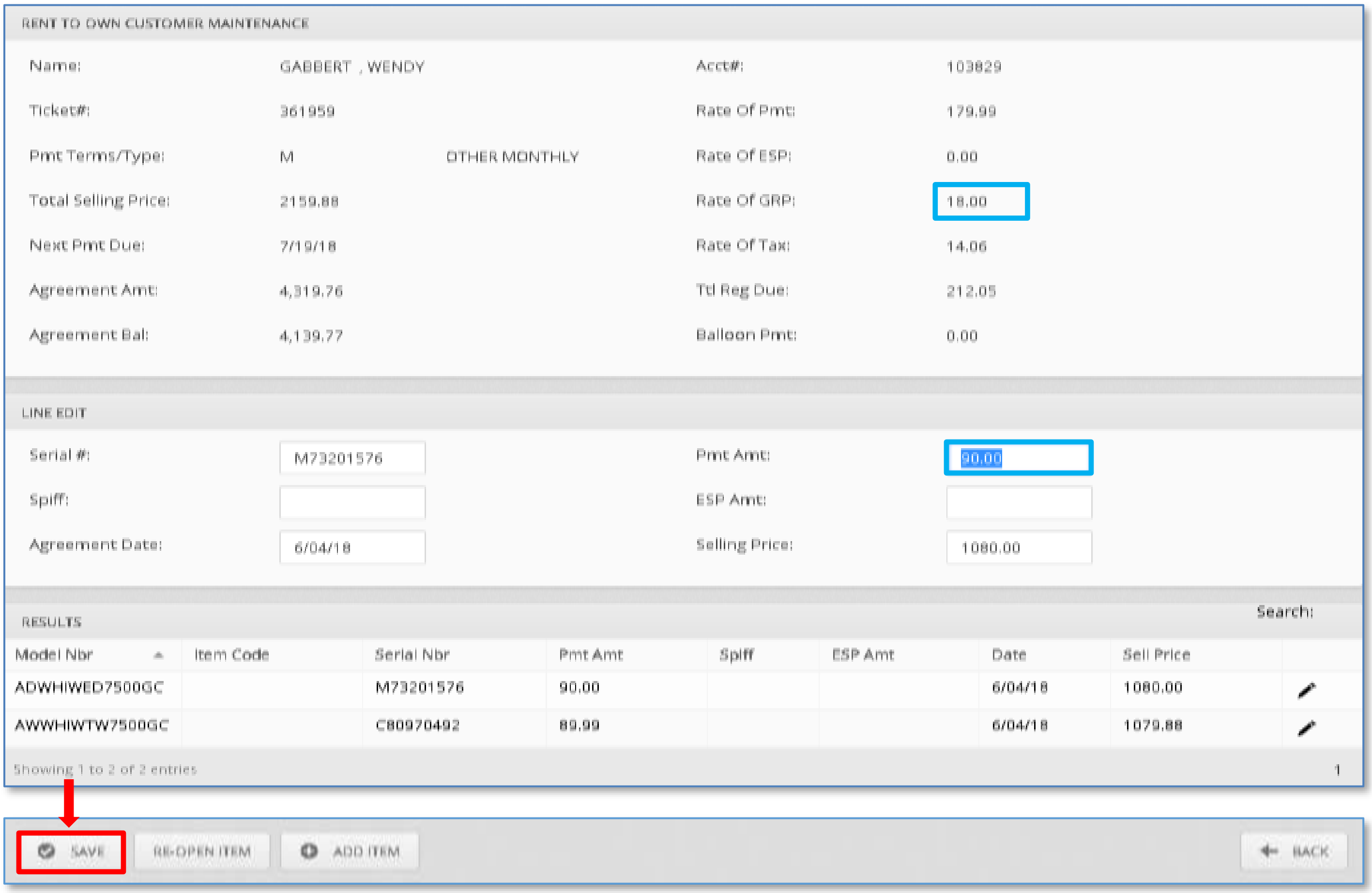
Simply update the Store number field.



If the tax group is different for the customer, you may be prompted to select a different tax group. Select the appropriate tax group.



Press the **SAVE** button.



<u>Please Use Caution</u>: Depending on security levels, the next screen may allow the option to change the rental payment amount and GRP/Waiver amount on the agreement. Typically, it is recommended to not change anything in this screen.

The Transfer Receipt will print which shows the *Old Store Number* and *New Store Number*. There are also signature lines available for tracking.

Cynergi|Suite Training
123 May Street — Ticket Nbr: 361959
Anytown, TX 55555 — Old Store Nbr: 1
361-993-1790 — New Store Nbr: 7

Customer: Salesman: 998
Gabbert Wendy This is an RTO Account Transfer
123 W Anywhere Street
Anywhere,TX 55555
103829 11/19/18

Transfer By: ________________ Received By: ________________

The option to reprint the rental agreement is available.

- **<u>YES</u>** will reprint the original agreement.
- **<u>NO</u>** will complete the agreement transfer process.

Inventory Transfer via Pending Transfer Locations

Pending Transfer Locations will be the holding area for an inventory unit that is transferred from one store to another. This will prevent inventory units from being transferred from one store's "Idle" to another store's "Idle" without their knowledge or approval.

To do transfers like this, each store will have a Pending Transfer Location.
For example, if a company has four stores, the Pending Transfer Locations would be:
3001 – Pending = Store **1** Pending Transfer Location
3002 – Pending = Store **2** Pending Transfer Location
3003 – Pending = Store **3** Pending Transfer Location
3004 – Pending = Store **4** Pending Transfer Location

In this example, Store 1 needs to transfer an idle inventory unit to Store 4. They will transfer the inventory unit from Location 1 to Pending Location 3004. The unit will remain in Location 3004 "Pending" until Store 4 completes the transfer from their Pending Transfer Location (3004) to Location 4. Store 1 cannot transfer the unit from Location 1 directly to Location 4, nor can they transfer the unit from 3004 to 4. Only Store 4 can complete the transfer from their Pending Transfer Location 3004 to their idle location (4).

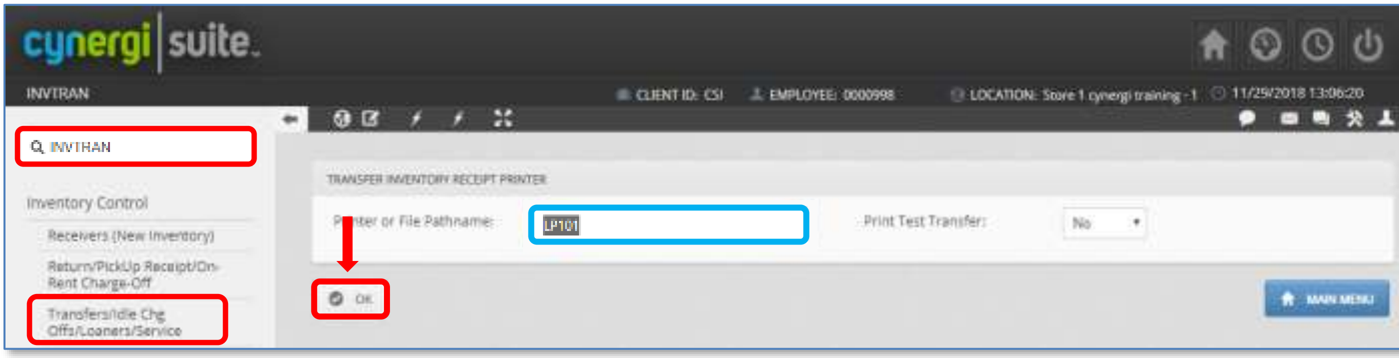
The New Transfer Path for the example above looks like this:

1) The Transfer "**OUT**" Store (1) will begin the transfer process by Transferring the Unit from Location **1** to Pending Location **3004.**
2) The Transfer "**IN**" Store (4) will complete the Transfer by Transferring the Unit from Location **3004** to Location **4.**

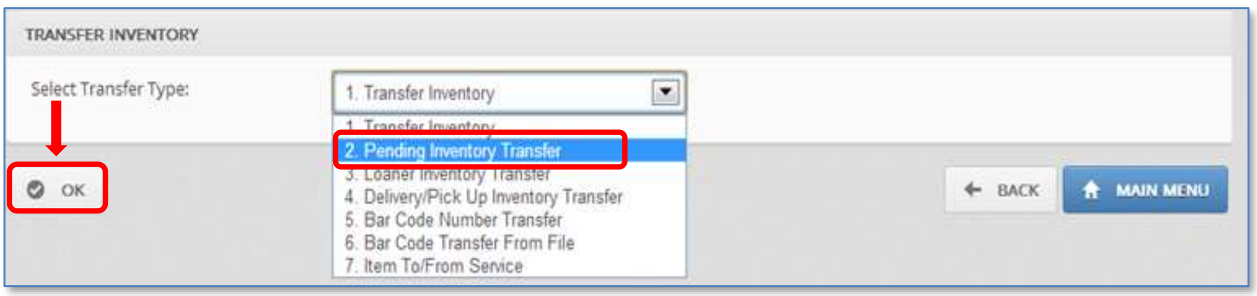
Please Use Caution: Units transferred to any Pending Transfer Location will remain in that Pending Location until the transfer in store completes the process. It is strongly recommended that Home Office/Operations Managers and/or Regionals use reports to monitor inventory units that are in these pending locations.

Step 1: Transferring OUT to the Receiving Store's Pending Transfer Location

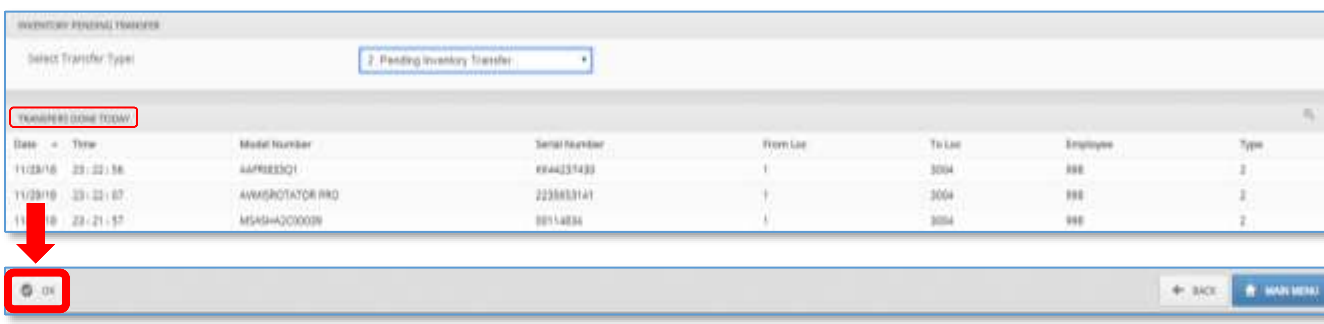
From the Inventory Control Menu, either choose **Transfers/Idle Chg Offs/Loaners/Service** or type **INVTRAN** in the ***Jump-To*** box. On the *Transfer Inventory Receipt Printer* pop-up window, change the Printer or File Pathname, if necessary. Click **OK** to continue.



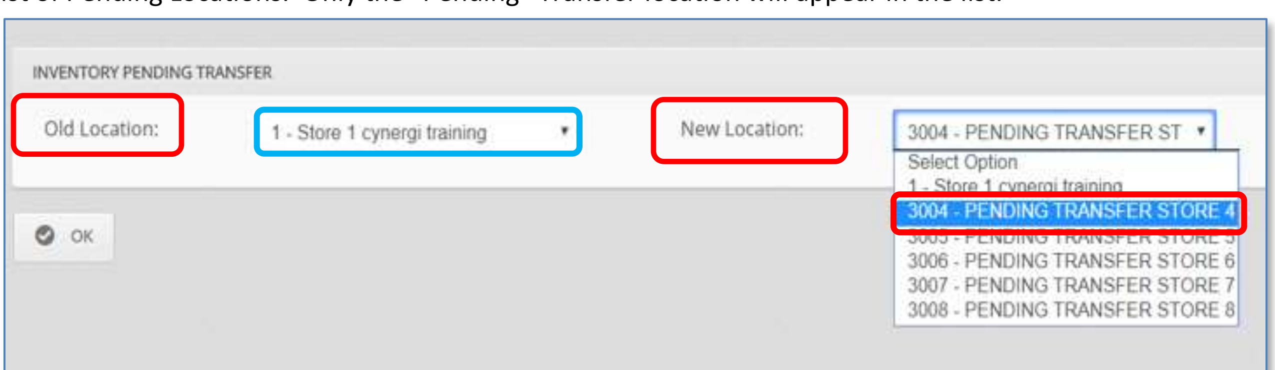
Use the drop-down selection and choose **2. Pending Inventory Transfer**, then click **OK**.



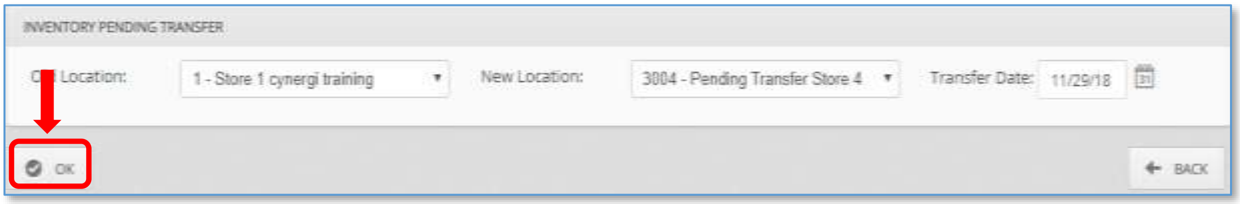
The next screen will show all Transfers that have already been done today. Click **OK** to move to the next screen.



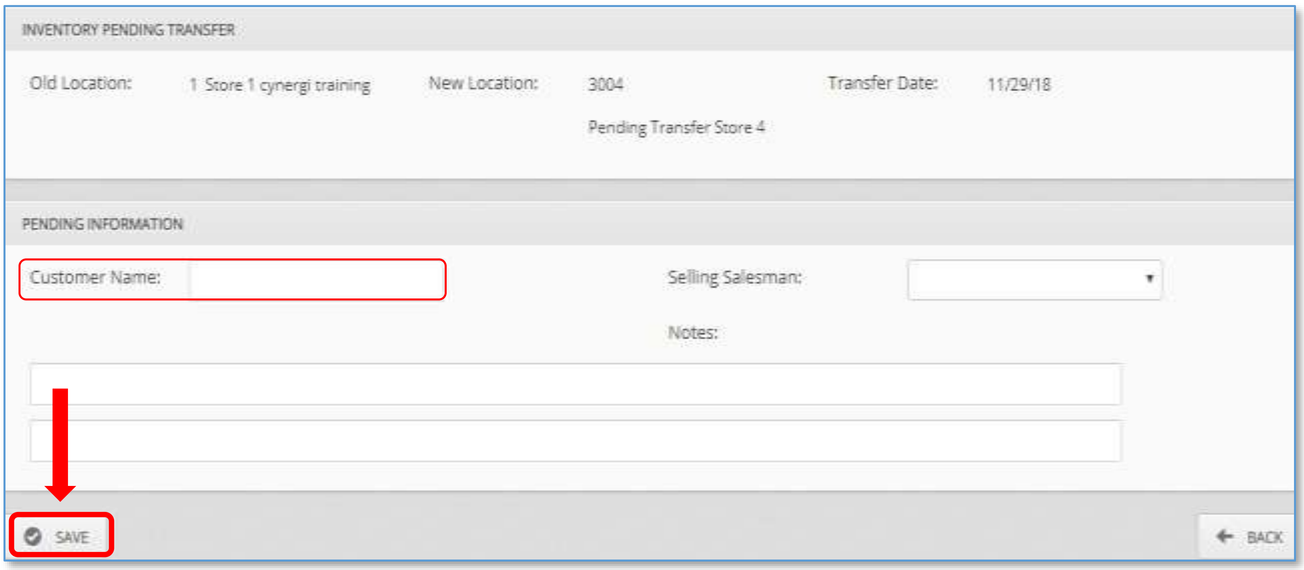
Select the Transfer "OUT" Location (**Old Location**) and then select the Transfer "TO" Location (**New Location**) from the list of Pending Locations. Only the "Pending" Transfer location will appear in the list.



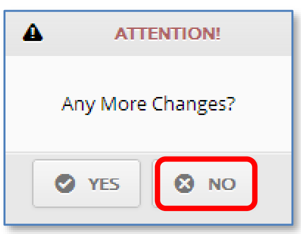
Once you have selected a Pending Location click **OK** to continue.



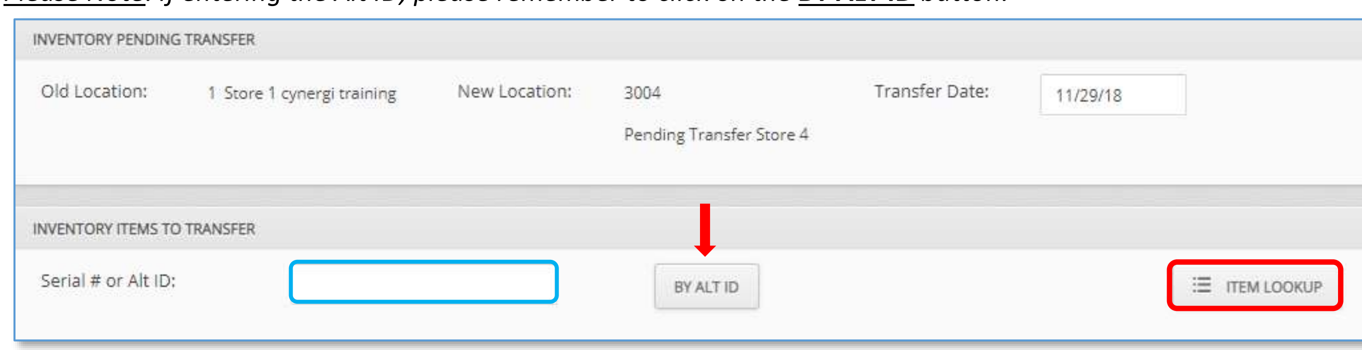
The next screen is prompting for a customer name since this is an idle unit and does not have a customer associated with it. Click **SAVE** to move past this screen.



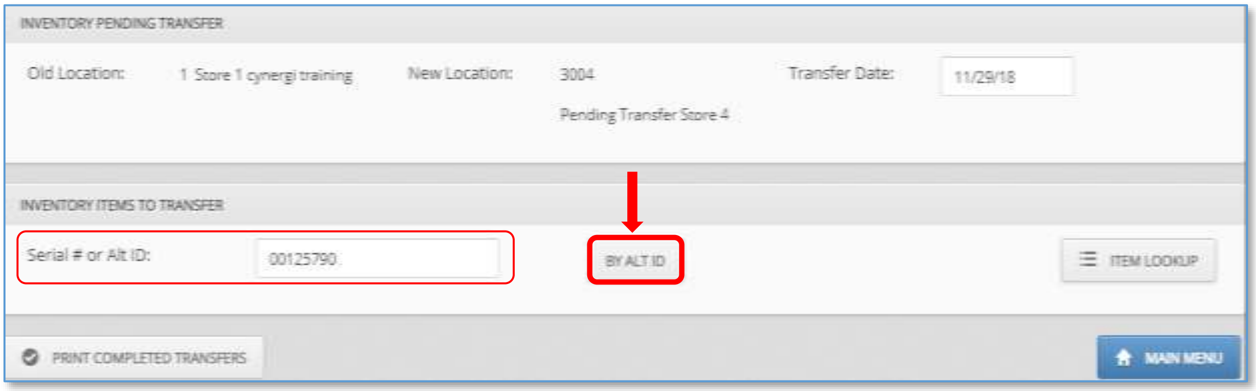
Answer **NO** to the *Any More Changes* prompt to move to the next screen.



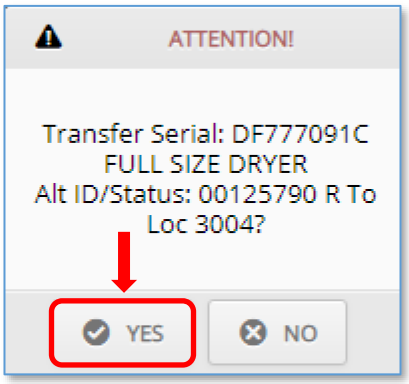
Enter the **Serial #** or **Alt ID** or choose a unit through the **ITEM LOOKUP** option.
*Please Note: If entering the Alt ID, please remember to click on the **BY ALT ID** button.*



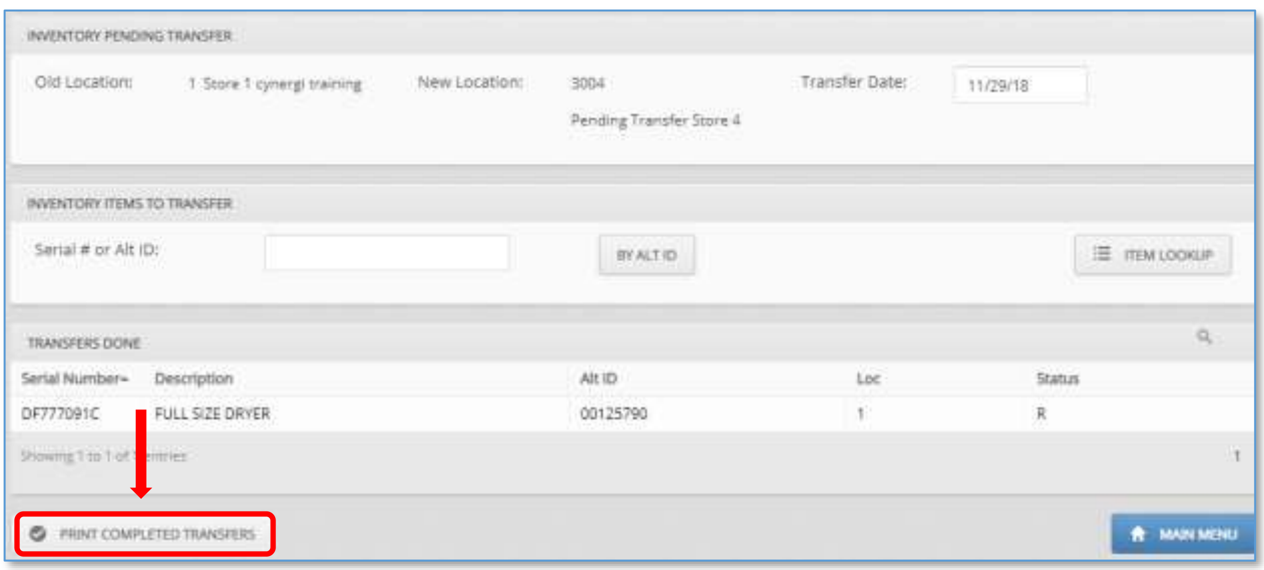
Example using Alt ID



The transfer confirmation screen will appear. Click **YES** to confirm and complete the transfer out.



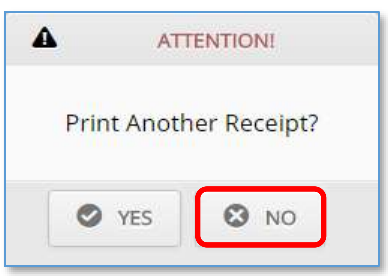
The Transfer to the Pending Location is complete. Click on the **PRINT COMPLETED TRANSFERS** button to print the transfer receipt.



The Pending Transfer receipt will print.

```
****  TEST RECEIPT - corts1 ****
*****      THIS IS A PENDING     *****
              Pending Date: 11/29/18

     PENDING FROM:
 Store 1 cynergi training

     PENDING TO:
PENDING TRANSFER STORE 4

MODEL#/DESC/AltID      SERIAL NBR QTY   PIECES
ADGENGTDS560EFWS       DF777091C    1        1
FULL SIZE DRYER
00125790                          ----   ----

Totals This Transfer:               1        1

Empl #: 998
Pending Customer:
Slsman:                N
Transfer Notes:

Delivered By: ______________________________

Received By: _______________________________


****  TEST RECEIPT - corts1 ****
```

At the *Print Another Receipt* prompt, click **NO** if another receipt is not needed.

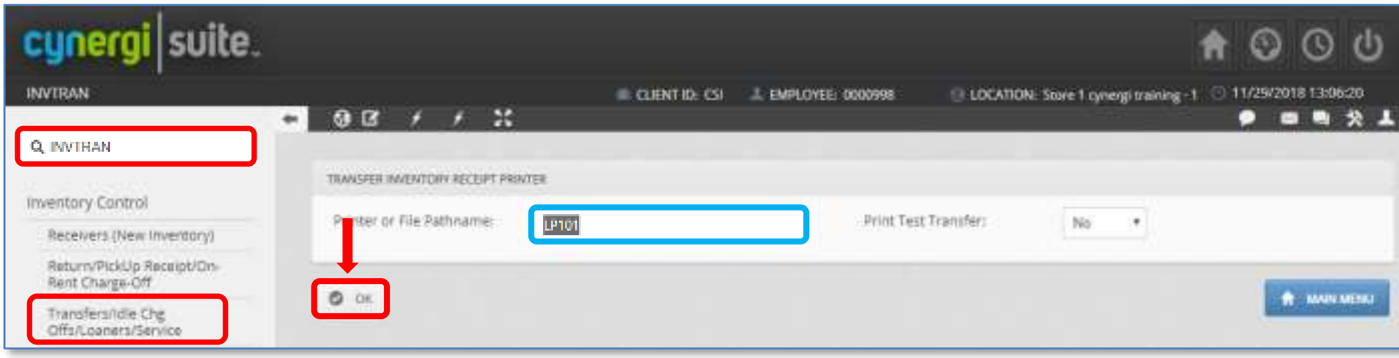


You are now finished with the Transfer "OUT" to the other store's Pending Transfer Location.

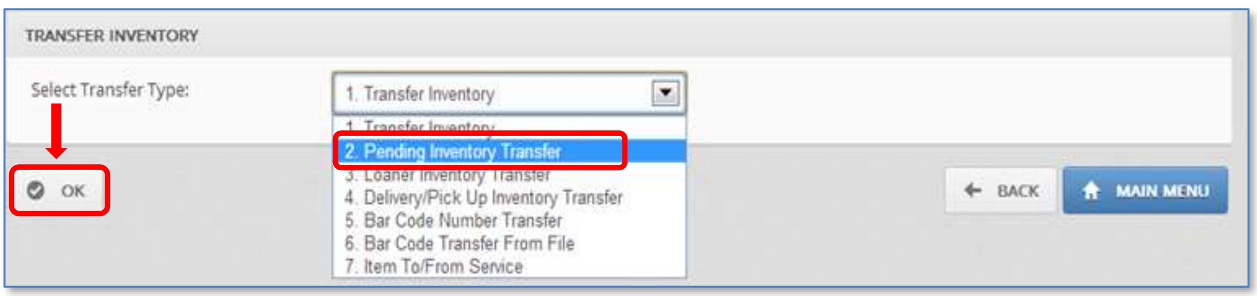
Step 2: Completing the Transfer from the Pending Location to the Store's Transfer IN Idle Location

Please Note: This next step is going to be done at the Pending Transfer Location, in this case store 004. The Transfer "IN" Store (4) will complete the transfer by Transferring the Unit from location 3004 (Pending Transfer) to the store location 4.

From the Inventory Control Menu, either choose **Transfers/Idle Chg Offs/Loaners/Service** or type **INVTRAN** in the ***Jump-To*** box. On the *Transfer Inventory Receipt Printer* pop-up window, change the Printer or File Pathname, if necessary. Click **OK** to continue.



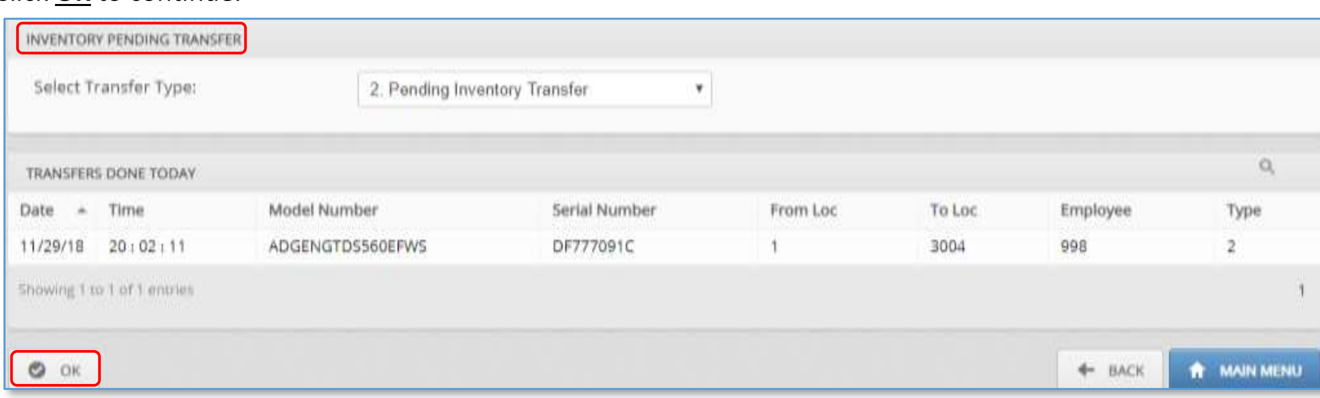
Use the drop-down selection and choose **2. Pending Inventory Transfer**, then click **OK**.



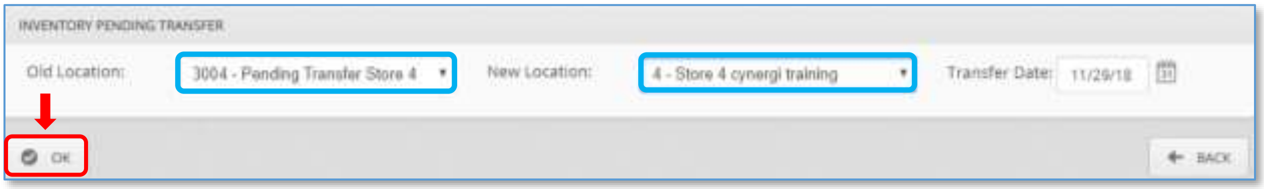
A list of all transfers done during the business day will be shown for reference.

*Please Note: This display is only showing the model number and the Serial Number. This **Transfers Done Today** screen does not display the Alt ID, if that was your original selection.*

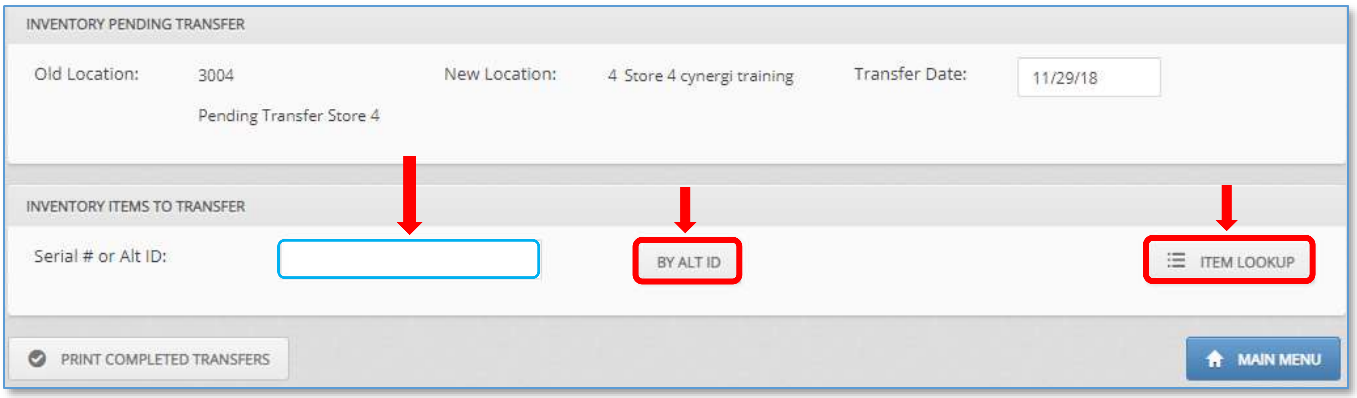
Click **OK** to continue.



To move the inventory unit from your store's pending location to the store's Idle location, select the Pending Location of your store, then select the Idle Location for your store. Click **OK** to continue.

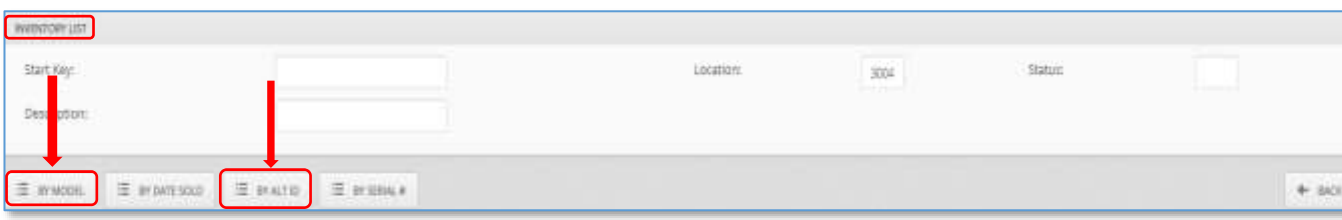


Use the **ITEM LOOKUP** button to find the Inventory Units in your Pending Location, or key in the Serial number or Alt ID if you know it.

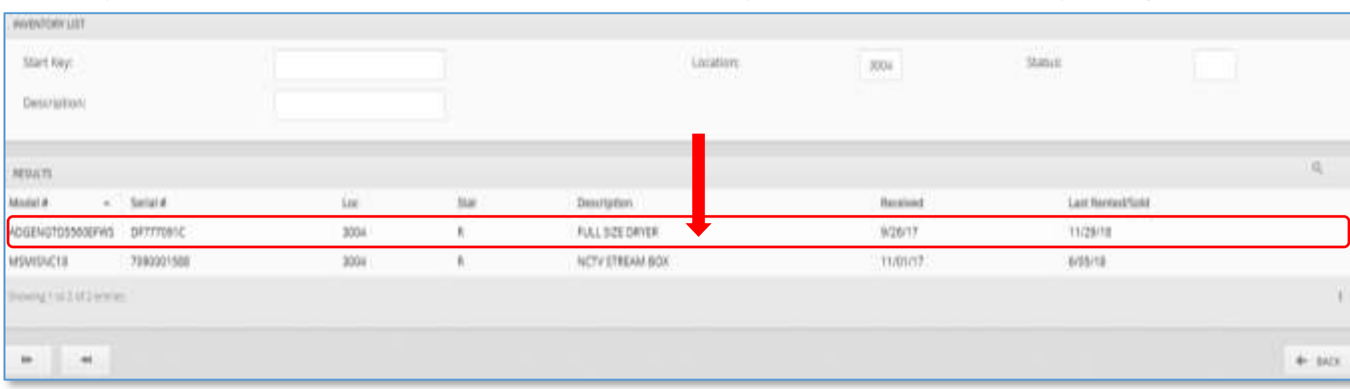


Example Using ITEM LOOKUP

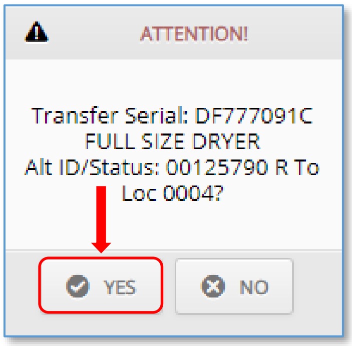
By clicking on the **ITEM LOOKUP** button (shown above), the screen below will be shown. Notice the ***Location*** is already defaulted to 3004 (pending store location). This search will only be looking for inventory in Location 3004. You may select either the **BY MODEL** or **BY ALT ID** button below to begin the lookup.



A list of all inventory units that currently reside in in Pending Transfer Location 3004 will be shown. Select the inventory unit that you wish to transfer in from the list. Click on the unit you want to transfer from pending to idle.



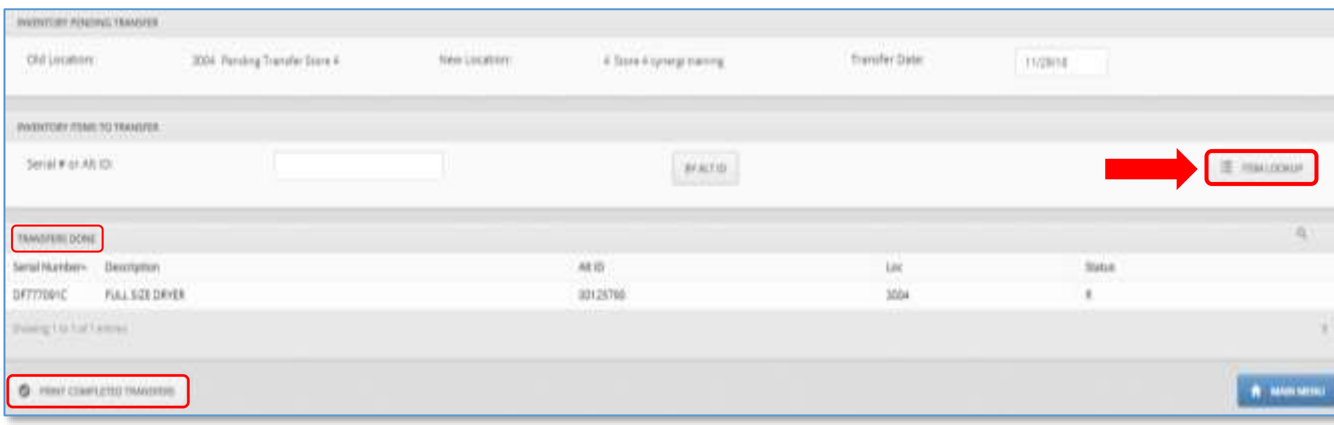
The transfer confirmation screen will appear. Click **<u>YES</u>** to confirm and complete the transfer **IN**.



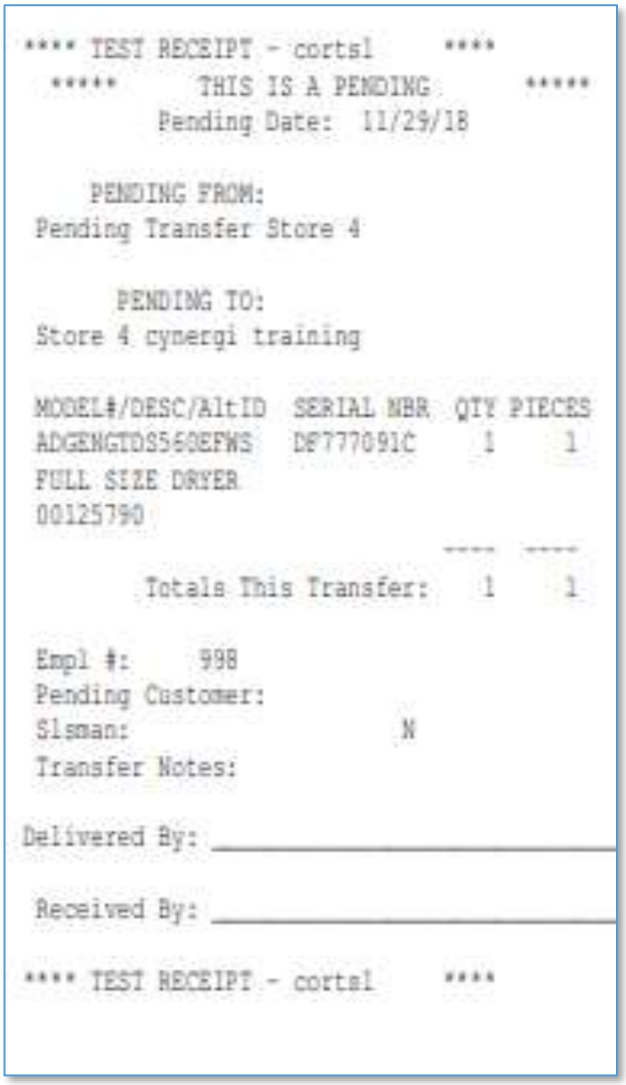
The final transfer screen appears which shows ***TRANSFERS DONE***.

*<u>Please Note</u>: At this point, **if there are multiple units to transfer in**, click on **<u>ITEM LOOKUP</u>** again, which will take you back to the LOOK UP where you can list the remaining pending transfers and pick another unit from the list. You can do this for as many units as you need to transfer in.*

Click the **<u>PRINT COMPLETED TRANSFERS</u>** button when you have finished transferring all of the units you need.

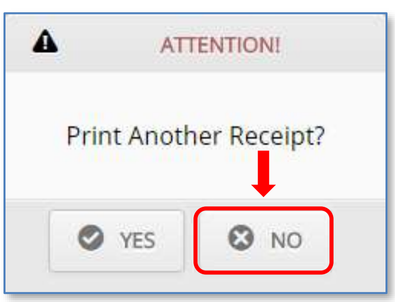


The Transfer receipt will print.



```
**** TEST RECEIPT - corts1      ****
  *****       THIS IS A PENDING        *****
           Pending Date:  11/29/18

     PENDING FROM:
 Pending Transfer Store 4

       PENDING TO:
 Store 4 cynergi training

 MODEL#/DESC/AltID  SERIAL NBR  QTY PIECES
 ADGENGTDS560EFWS   DF777091C     1      1
 FULL SIZE DRYER
 00125790
                                ----   ----
         Totals This Transfer:    1      1

 Empl #:      998
 Pending Customer:
 Slsman:                    N
 Transfer Notes:

Delivered By: ______________________________

 Received By: ______________________________

**** TEST RECEIPT - corts1      ****
```

At the *Print Another Receipt* prompt, click **<u>NO</u>** if another receipt is not needed.

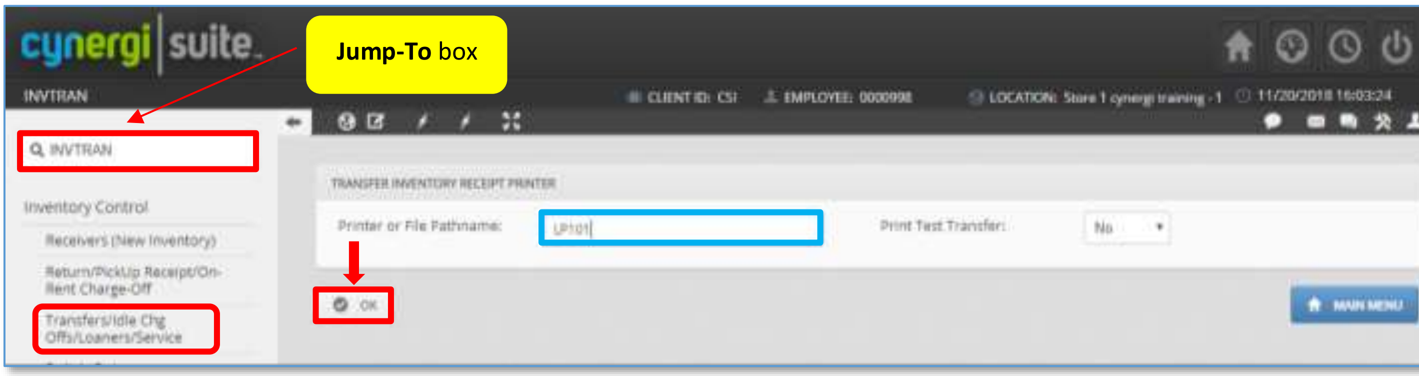


<u>You are now finished with the Transfer “IN” to your store’s idle location.</u>

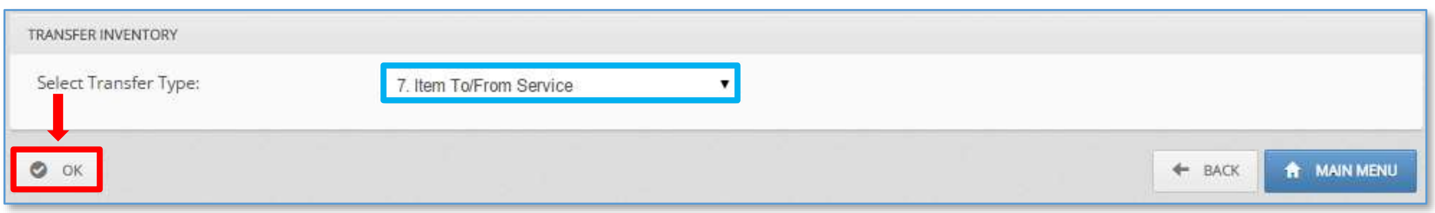
Transfer Inventory Units to Service

To transfer a Unit to Service, 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.
Please Note: Your menu option may be different than what is shown below.

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 and click **OK** to continue.

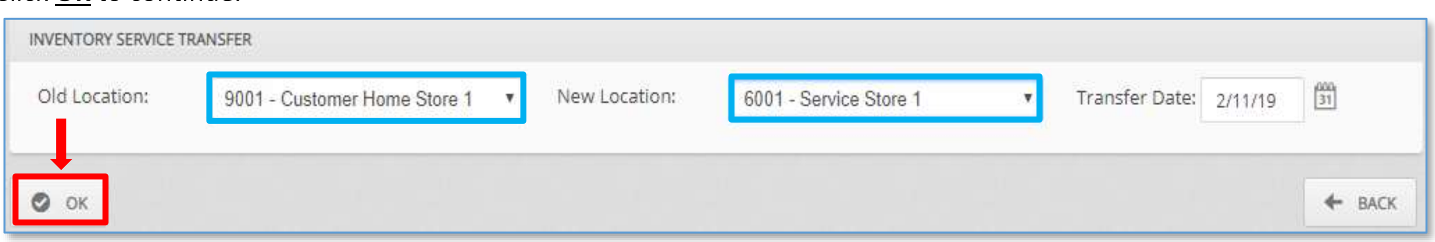


The default selection will be set to 1. Transfer Inventory. Click the pick list to change it to **7. Item To/From service**. Click **OK** to continue.

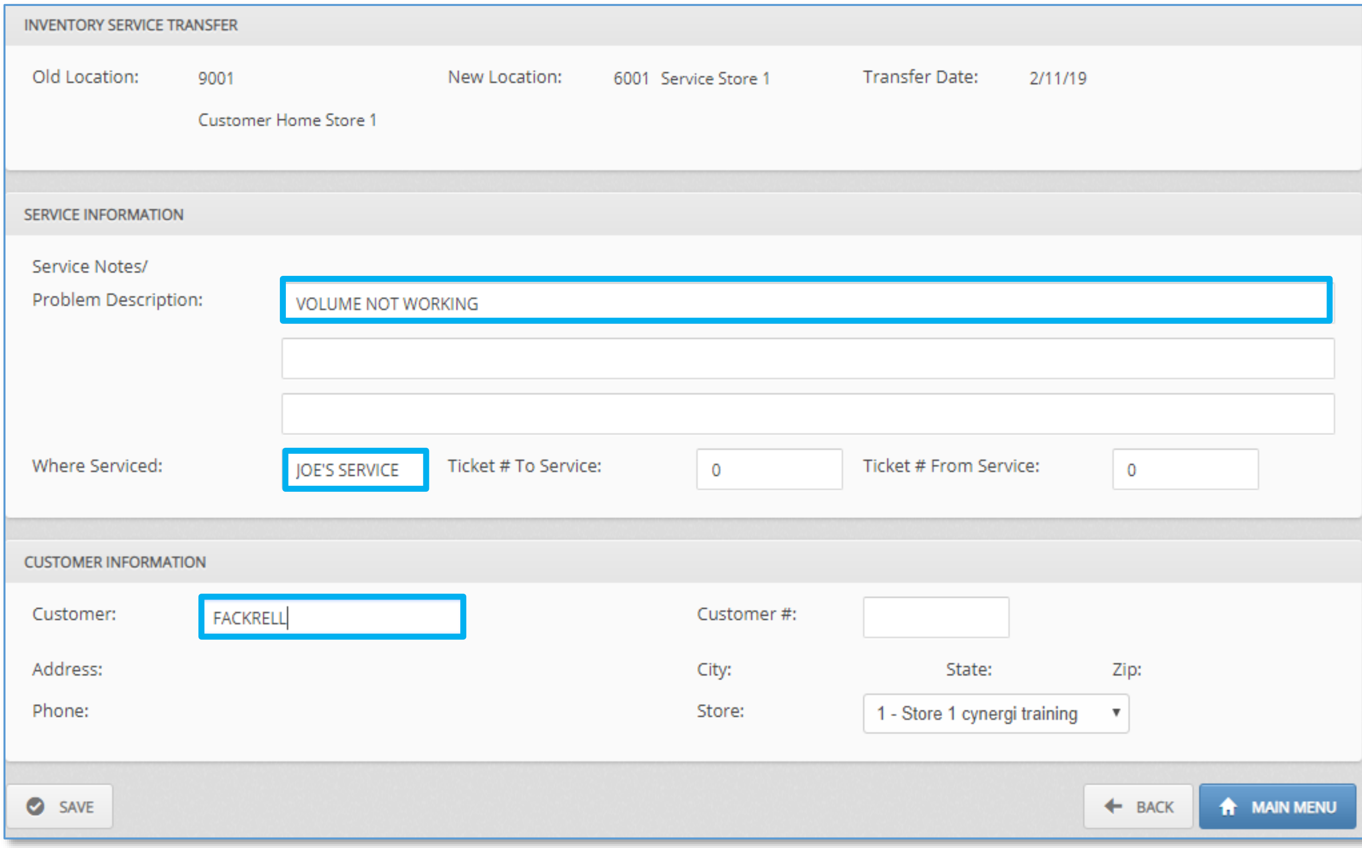


Select the **Old Location** and the **New Location** by using the available pick lists.
- The *Old Location* should be one of two locations:
  - If the unit going into service is idle, it will be the store's idle location.
  - If the unit is on-rent, it will be the store's customer home location.
    - The example below is this scenario where location 9001 represents the customer's home.
- The *New Location* should be the service location of the store to which the unit belongs.

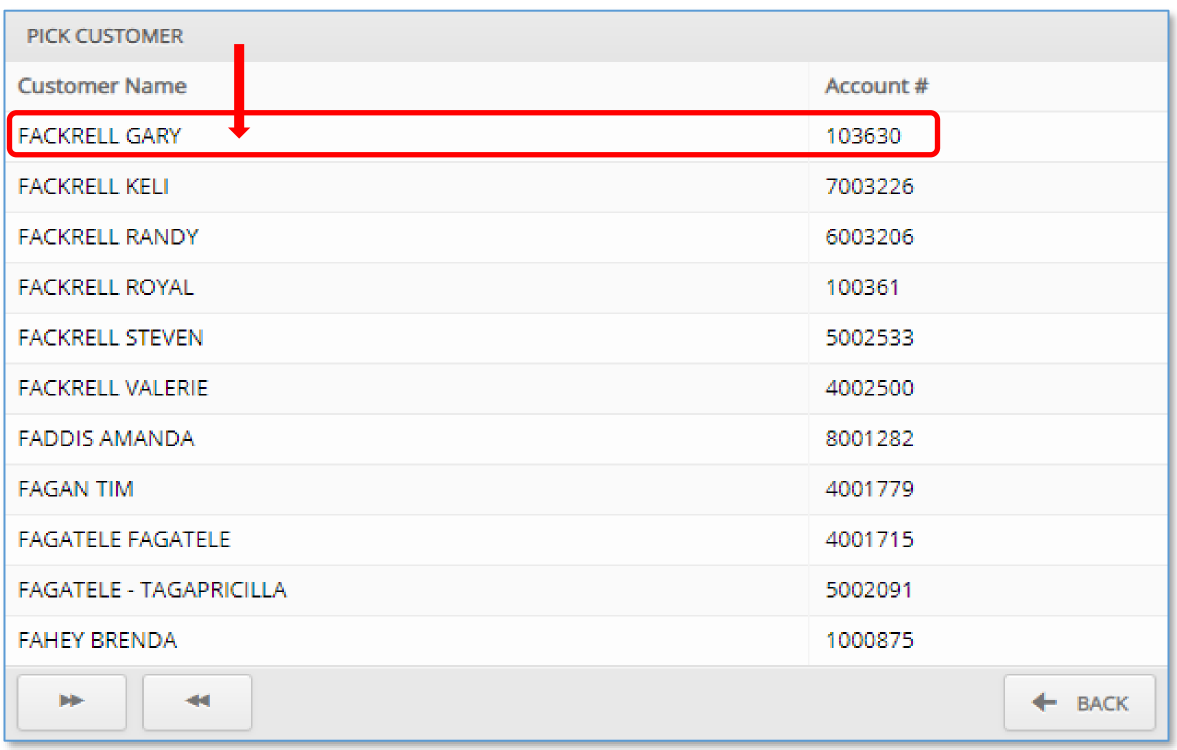
Click **OK** to continue.



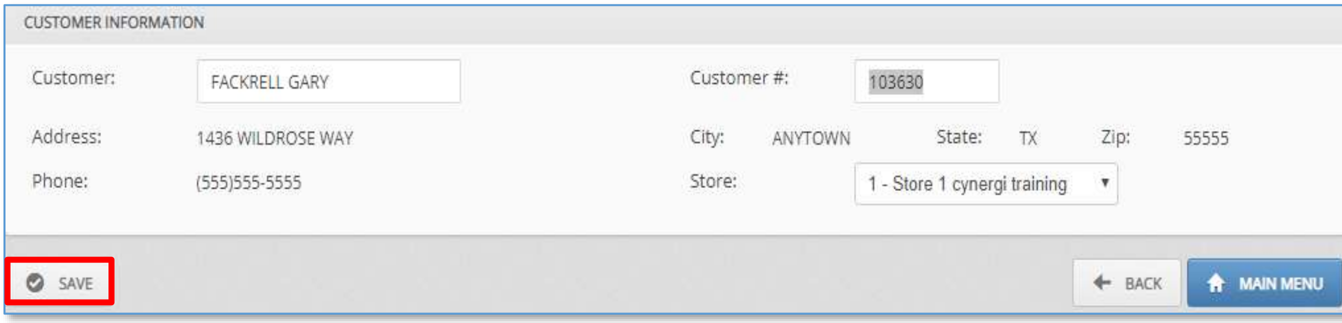
The Service Information and the Customer Information sections will appear.
- **Service Notes/Problem Description**: Can be used to enter repair notes, requests, and details.
- **Where Serviced**: Can be used to notate where the inventory unit is being serviced/repaired.
- **Customer**: Enter the customer's last name and press **TAB** or **ENTER** to continue. *For best results, enter the customer's entire last name for the customer name search.*
  Please Note: If the unit is idle, do not enter a customer name.



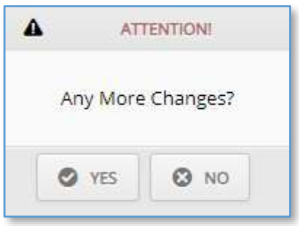
The customer pick list will open. To select the customer, click anywhere on the line displaying the customer name. If you are putting an idle unit into service, please do not select a customer. Instead, click **BACK** to skip the customer selection and continue.



After selecting the customer's name from the pick list, press the **SAVE** button.

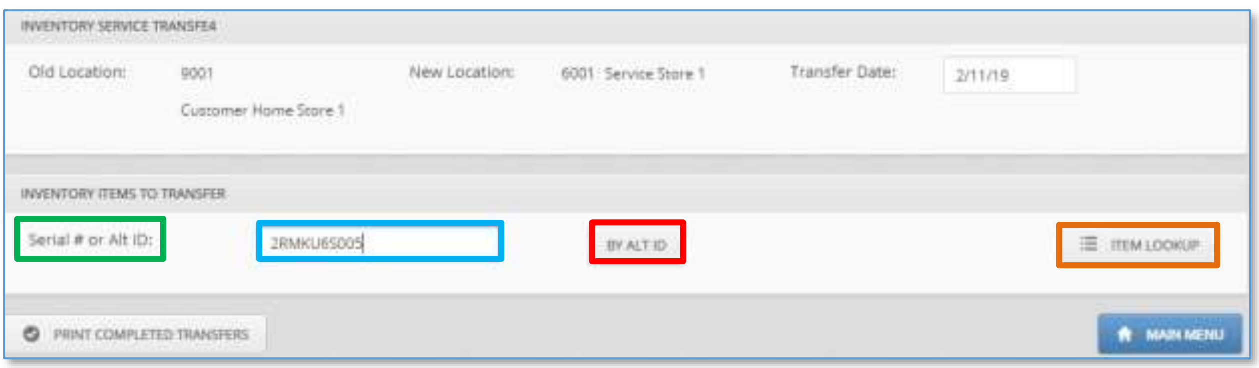


Click **YES** to confirm your updates or click **NO** to go back.

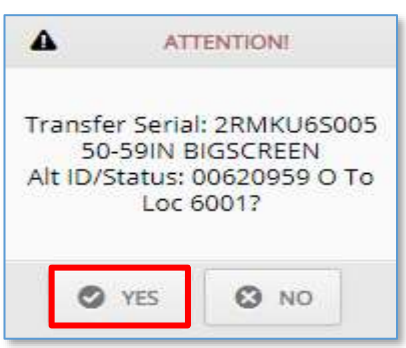


Enter the **Serial Number** or **Alt ID** of the unit that is being placed into Service.
Please Note: It is recommended to look up the Serial Number or Alt ID prior to this step so you have it ready to enter.

- If using the *Serial Number*, key the **Serial Number** into the box and press **ENTER**.
- If using the *Alt ID*, key the **Alt ID** number into the box and then click the **BY ALT ID** button.
- If you are unsure of either, *Item Lookup* may also be used to search and choose the inventory to be transferred.

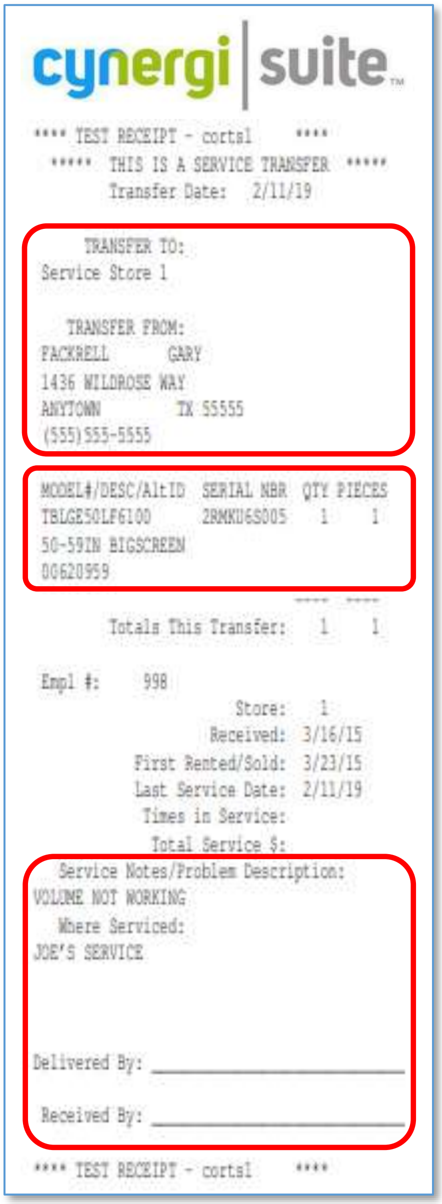


The Transfer confirmation message will appear displaying the unit *Serial Number* and *Description*. Click **YES** to confirm the transfer from "*On-Rent*" to "*In-Service*" or click **NO** to go back.



The receipt will print to the printer displaying the following information:

- Location change: Transfer To and Transfer From locations
- Inventory unit details: Model #, Description, Alt ID, and Serial Number
- Service Comments, Delivered By, and Received By


**** TEST RECEIPT - cortsl ****
***** THIS IS A SERVICE TRANSFER *****
Transfer Date: 2/11/19

TRANSFER TO:
Service Store 1

TRANSFER FROM:
PACKRELL GARY
1436 WILDROSE WAY
ANYTOWN TX 55555
(555)555-5555

MODEL#/DESC/AltID SERIAL NBR QTY PIECES
TBLGE50LF6100 2RMKU6S005 1 1
50-59IN BIGSCREEN
00620959

Totals This Transfer: 1 1

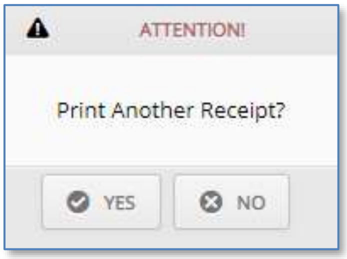
Empl #: 998
Store: 1
Received: 3/16/15
First Rented/Sold: 3/23/15
Last Service Date: 2/11/19
Times in Service:
Total Service $:
Service Notes/Problem Description:
VOLUME NOT WORKING
Where Serviced:
JOE'S SERVICE

Delivered By: ____________________

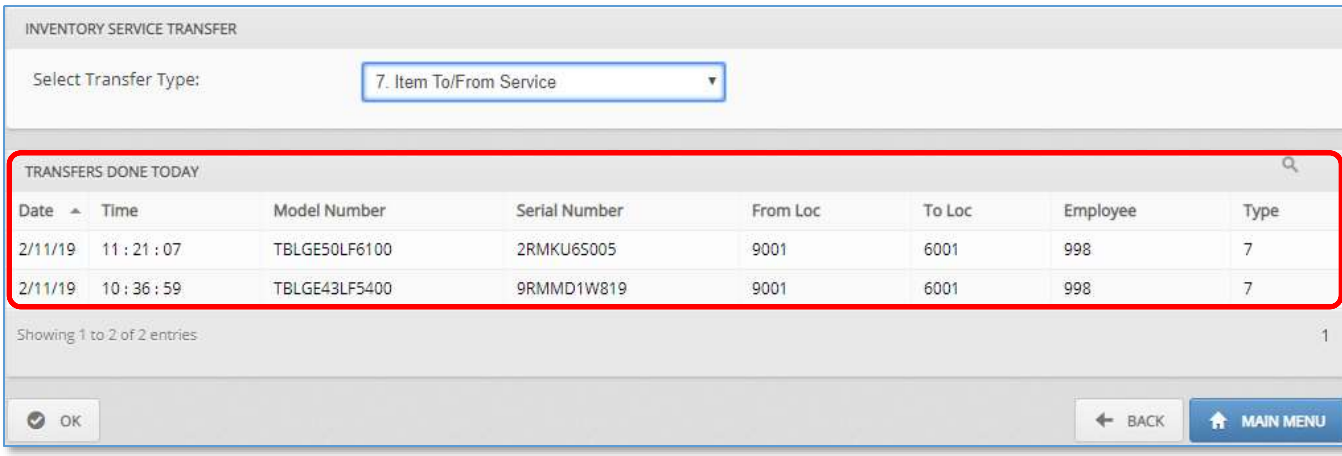
Received By: ____________________

**** TEST RECEIPT - cortsl ****

You will have the option to print another receipt. If you need another copy, press **YES**. Otherwise, click **NO** to go back to the beginning of the **INVTRAN** (Inventory Transfer) screen to key-in a new transfer.



To view completed transfers, go back into the transfer process. All completed transfers done on the current business day will display under the *Transfers Done Today* section of the transfer screen.



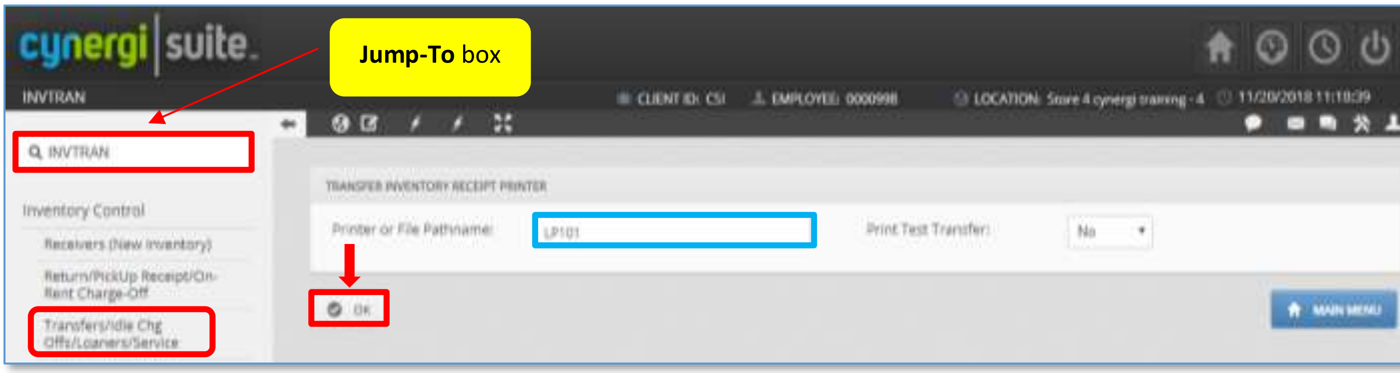
Transfer Inventory Units from Service

To transfer a Unit from Service, type **INVTRAN** into the ***Jump-To*** box and press the **<u>TAB</u>** or **<u>ENTER</u>** key. You may also select it from your company's cynergi|suite menu.

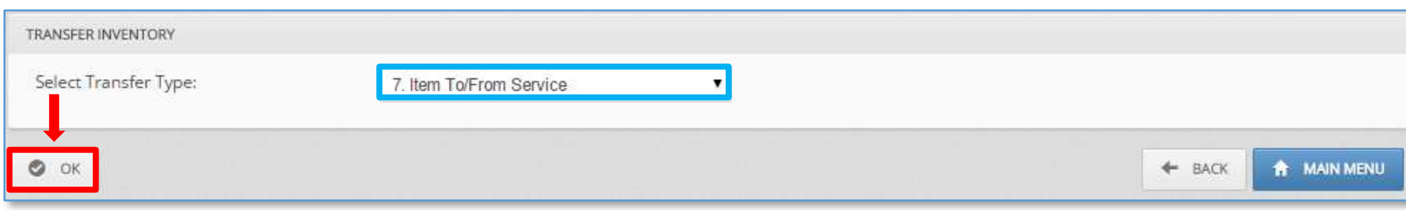
<u>Please Note</u>: Your menu option may be different than what is shown below.

The first screen will display the default printer name.

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



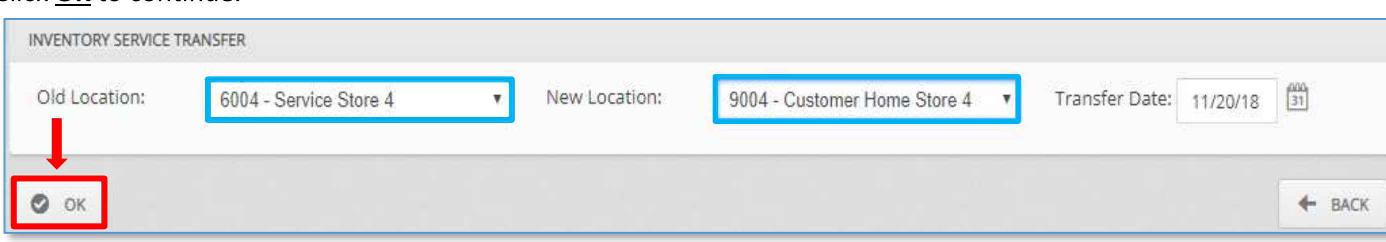
The default selection will be set to <u>1. Transfer Inventory</u>. Click the pick list to change it to **<u>7. Item To/From service</u>**. Click **<u>OK</u>** to continue.



Select the **<u>Old Location</u>** and the **<u>New Location</u>** by using the available pick lists.

- The "Old Location" will be your store's service location (Example 6001).
- The "New Location" should be one of the two locations:
  - If the unit should be idle, it will be the store's idle location.
  - If the unit should be on rent, it will be the customer's home location.

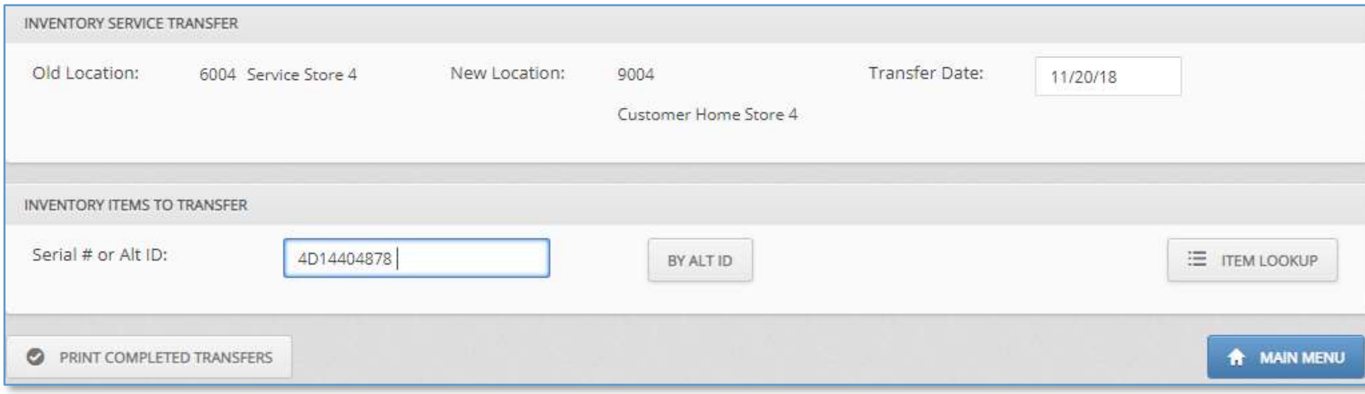
Click **<u>OK</u>** to continue.



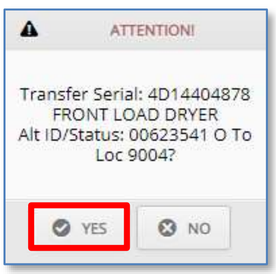
Enter the **Serial Number** or **Alt ID** of the unit that is being "**removed**" from Service.

Please Note: It is recommended to look up the Serial Number or Alt ID prior to this step so you have it ready to enter.

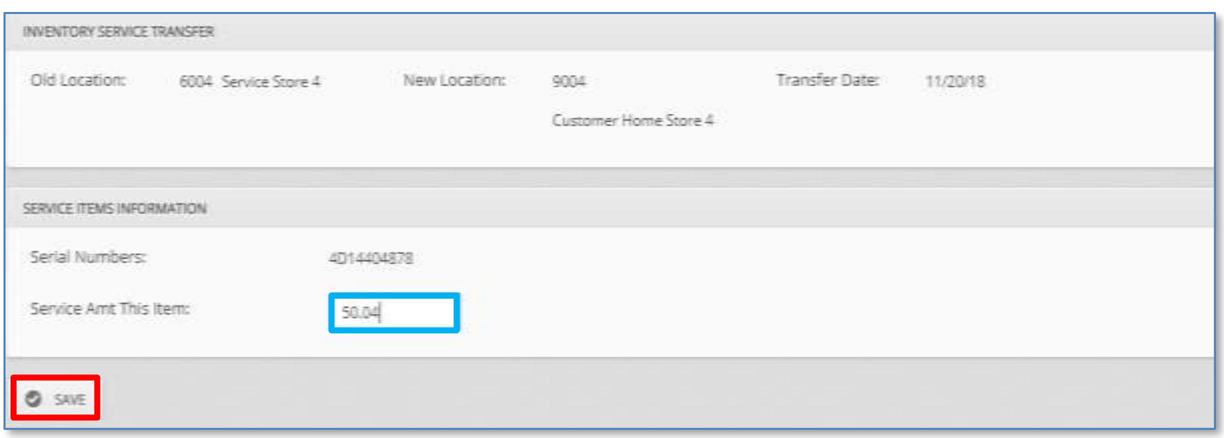
- If using the *Serial Number*, key the **Serial Number** into the box and press **ENTER**.
- If using the *Alt ID*, key the **Alt ID** number into the box and then click the **BY ALT ID** button.
- If you are unsure of either, *Item Lookup* may also be used to search and choose the inventory to be transferred.



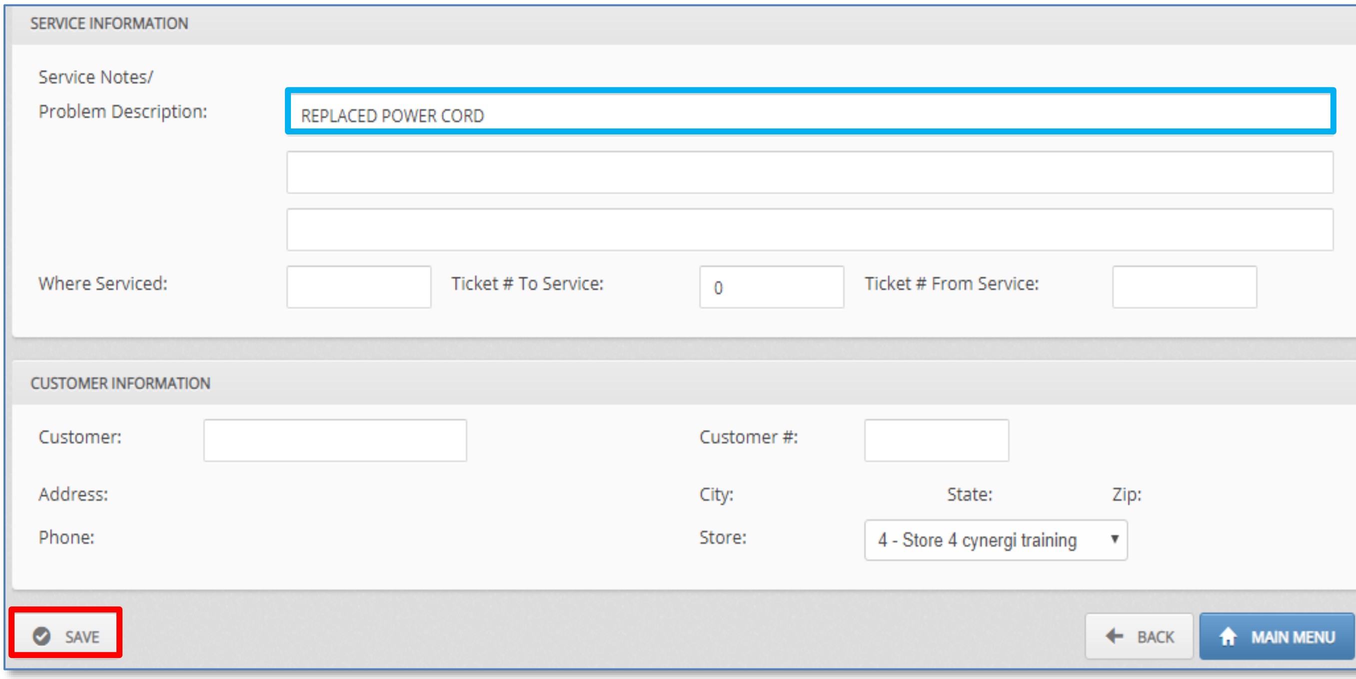
The Transfer confirmation message will appear, displaying the unit *Serial Number* and *Description*. Click **YES** to confirm the transfer from "*In-Service*" to "*On-Rent*" or click **NO** to go back.



The cost of service repairs can be entered if needed. Click **SAVE** to continue.

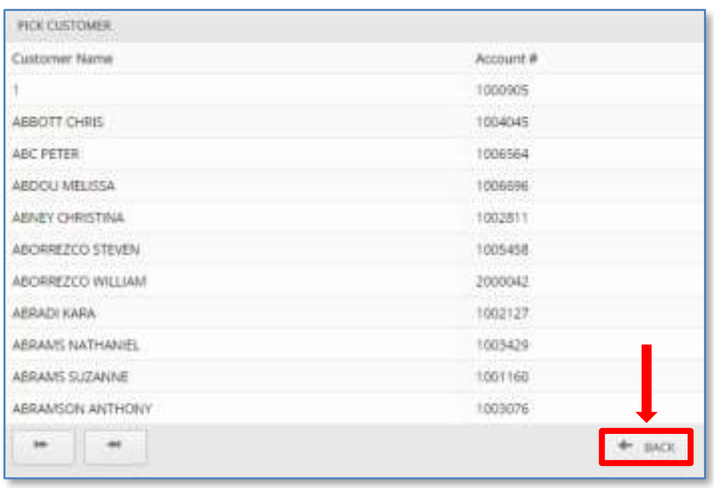


The *Service Notes/Problem Description* can be used to enter details about the repairs. Click **SAVE** to continue.

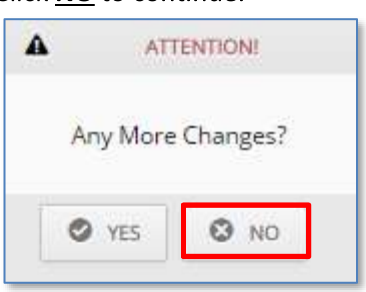


The customer name pick list will appear. Click **BACK** to continue.

Please Note: The unit to return from service was previously entered, so the customer name is not needed.

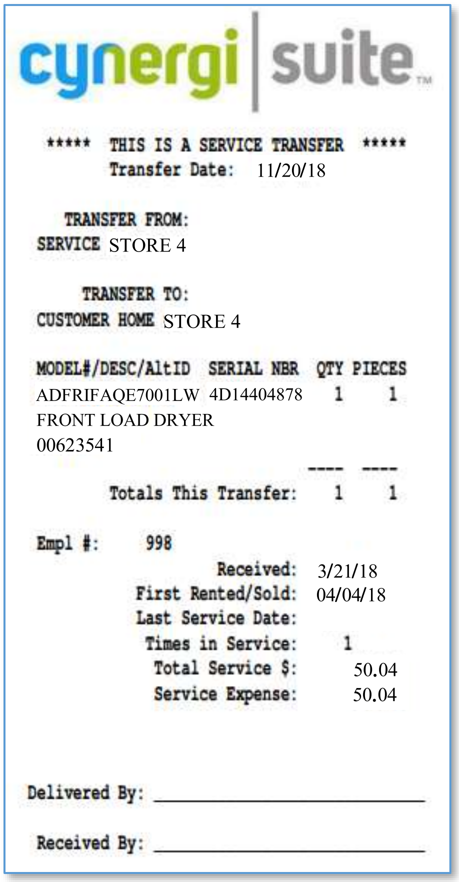


Click **NO** to continue.



The receipt will print showing the following information:

- Location change: Transfer To and Transfer From locations
- Inventory unit details: Model #, Description, Alt ID, and Serial Number
- Details of last service date, number of times in service, and Service Expenses
- Service Comments, Delivered By, and Received By


cynergi suite

***** THIS IS A SERVICE TRANSFER *****
Transfer Date: 11/20/18

TRANSFER FROM:
SERVICE STORE 4

TRANSFER TO:
CUSTOMER HOME STORE 4

MODEL#/DESC/AltID	SERIAL NBR	QTY	PIECES
ADFRIFAQE7001LW	4D14404878	1	1
FRONT LOAD DRYER			
00623541			
		----	----
Totals This Transfer:		1	1

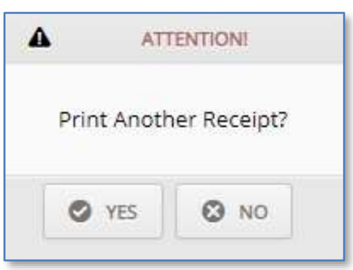
Empl #: 998

Received:	3/21/18
First Rented/Sold:	04/04/18
Last Service Date:	
Times in Service:	1
Total Service $:	50.04
Service Expense:	50.04

Delivered By: ____________________

Received By: ____________________

You will have the option to print another receipt. Press **NO** if another receipt is not required. Press **YES** if another receipt is required.



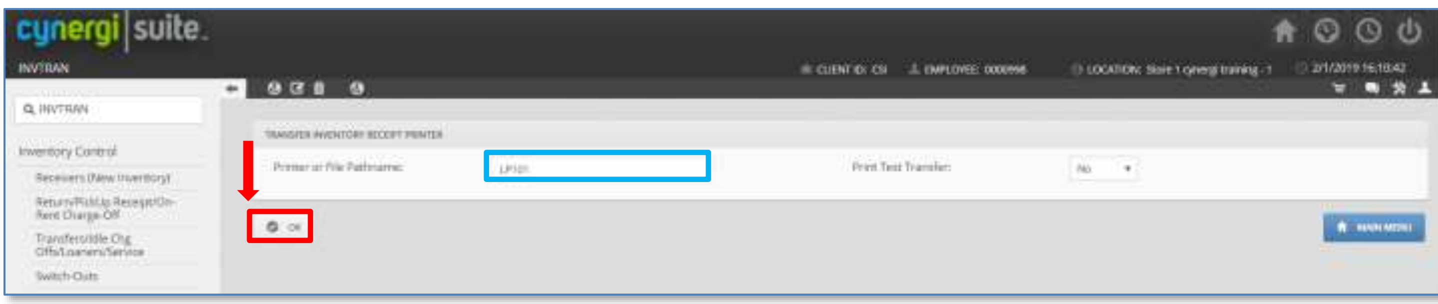
Switch Out Inventory

To Switch Out an inventory unit on an active rental agreement, type **INVTRAN** into the ***Jump-To*** box and press the **TAB** or **ENTER** key. Switch Outs may also be selected from the cynergi|suite menu.

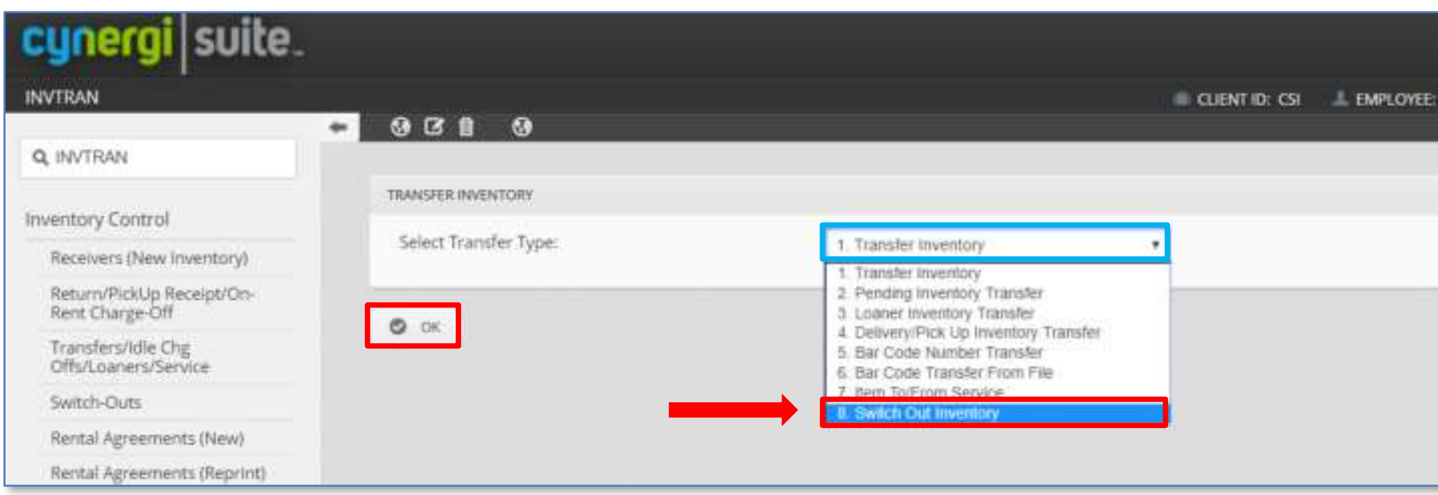
Please Note: Your menu option may be different from what is shown below.

The first screen will display the default printer name.

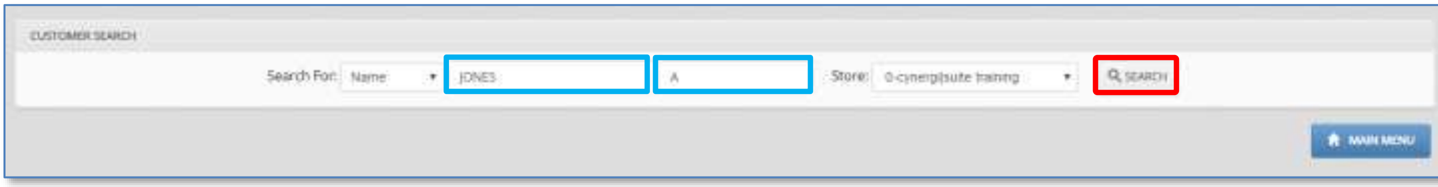
- If the printer name is correct, click **OK** to continue.
- If you wish to print to a different printer, enter the printer name you wish to print to, and click **OK** to continue.



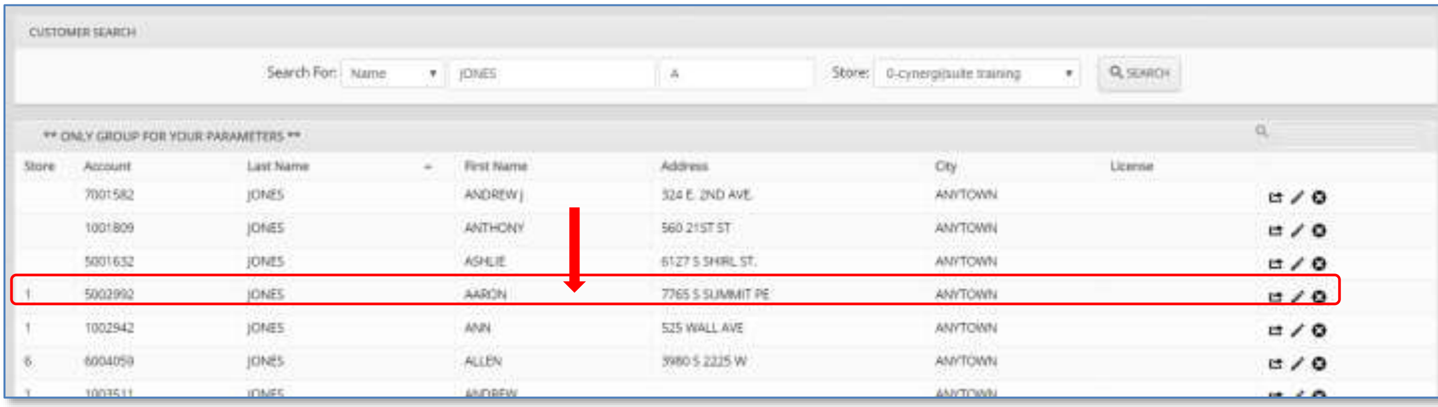
The default selection will be set to 1. Transfer Inventory. Select **8. Switch Out Inventory** from the pick list. Click **OK** to continue.



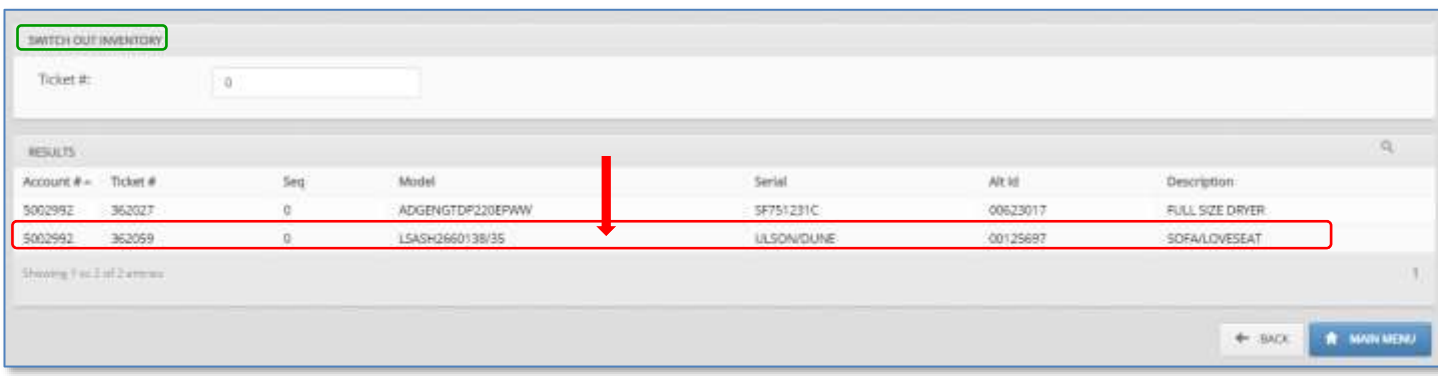
At the *Customer Search* screen, input the Customer Name, last name first.
Click **SEARCH** to continue.



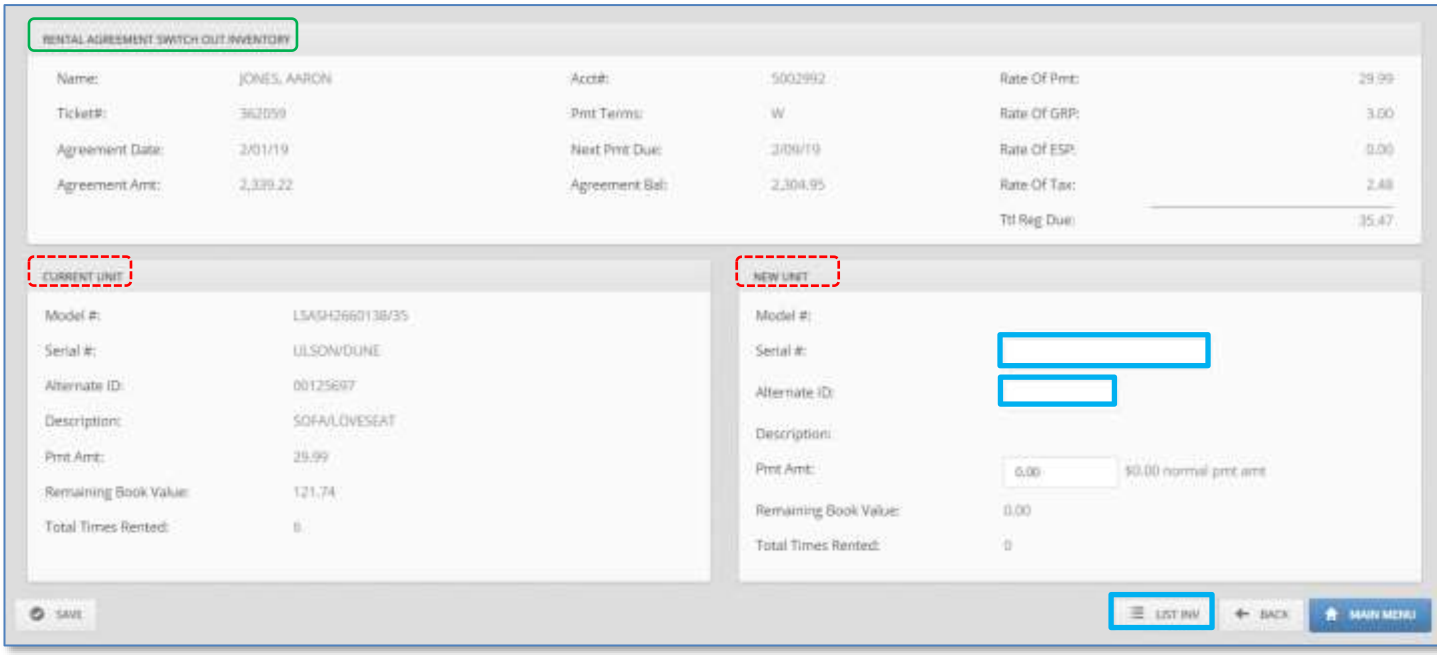
The *Customer Search* results will display below. Select the customer by clicking anywhere on the line displaying the customer's name.



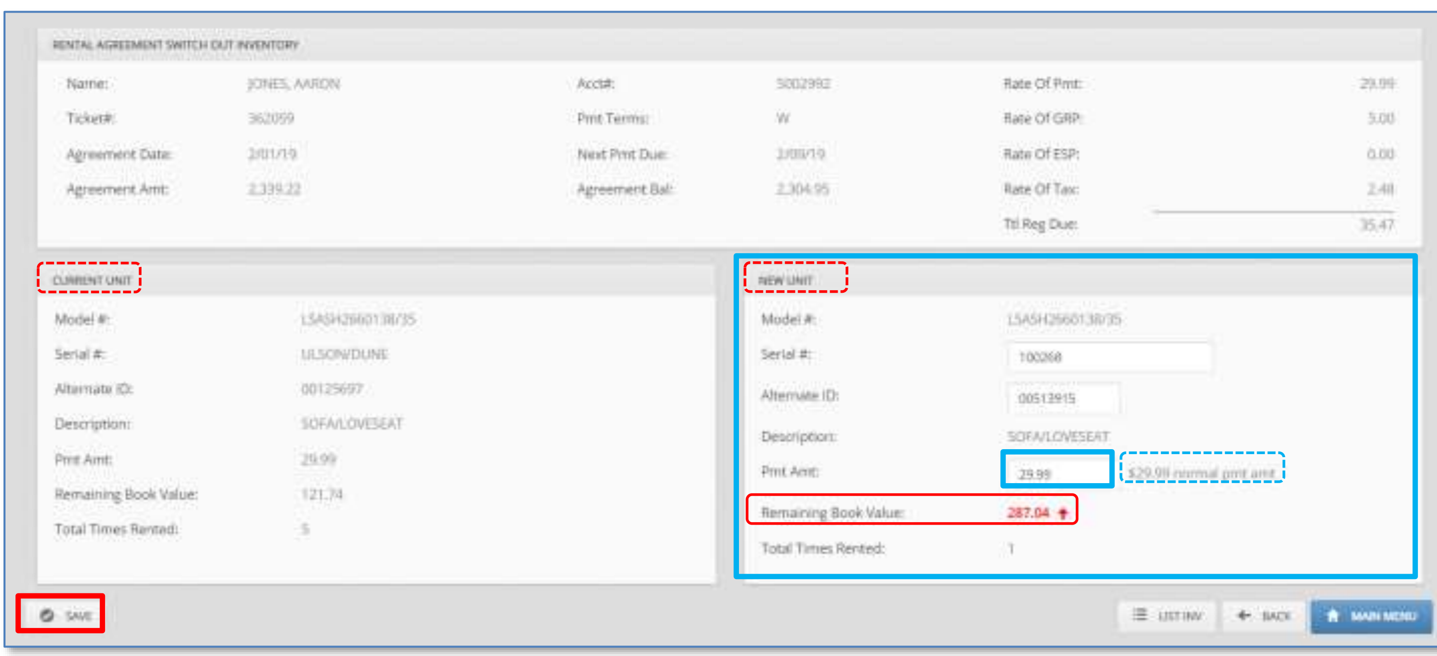
The ***Switch Out Inventory*** screen will display the customer's open agreements. Select the agreement of the inventory unit needing to be switched out by clicking anywhere on the agreement information line.



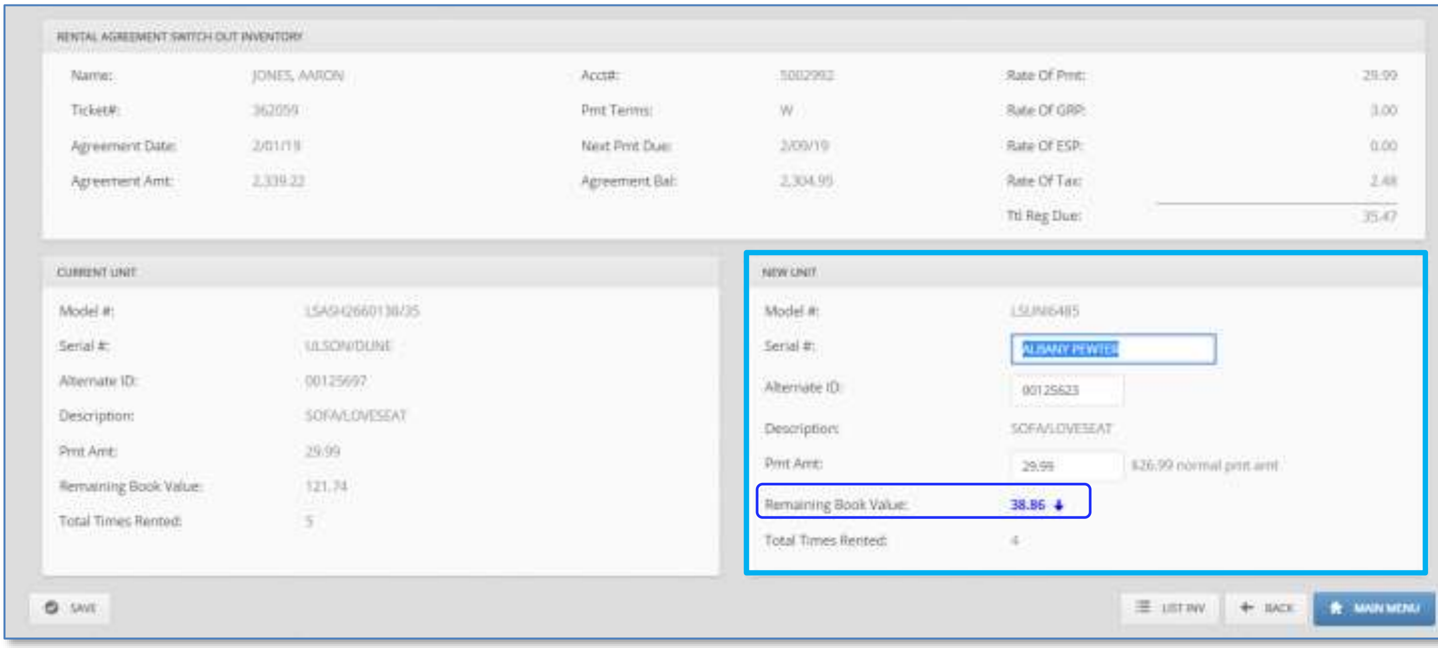
The **Rental Agreement Switch Out Inventory** screen will open. Enter the new unit by **Serial Number**, **Alternate ID**, or by clicking the **LIST INV** button to search for the item.



The new unit information is displayed next to the original unit so you can compare details of the two units, Model Number, Description, Remaining Book Value and Rental Rates (Pmt Amt). The payment amount for the new unit will be automatically populated with the payment amount from the original unit. The new unit's original rental rate will be shown to the right so you can see if there are differences in rental rates between the original unit and the new replacement unit. At this time, the **Pmt Amt** may be changed (with proper security clearance). If the Remaining Book Value of the new unit is higher than the original unit, it will be displayed in **RED** with an arrow pointing up. If the Remaining Book Value is lower than the original unit it will be displayed in **BLUE** with an arrow pointing down. **At this point, a different unit may be selected if needed. Re-enter another Serial #, Alt ID, or use the LIST INV button.** Once the correct unit for the Switch Out has been selected, click on **SAVE**.

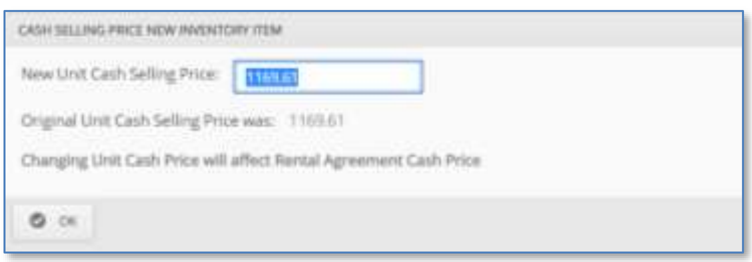


Example of selecting a unit with a lower remaining book value.

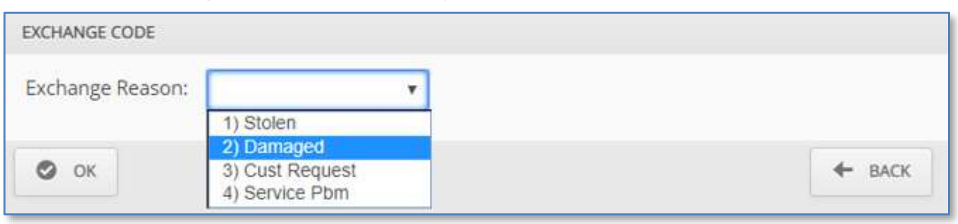


If the employee performing the Switch Out has security clearance to change the Cash Price, the screen below will appear displaying the New Unit's cash price compared to the Original Unit's cash price. The New Unit's cash price may be changed by entering the amount and clicking **SAVE**.

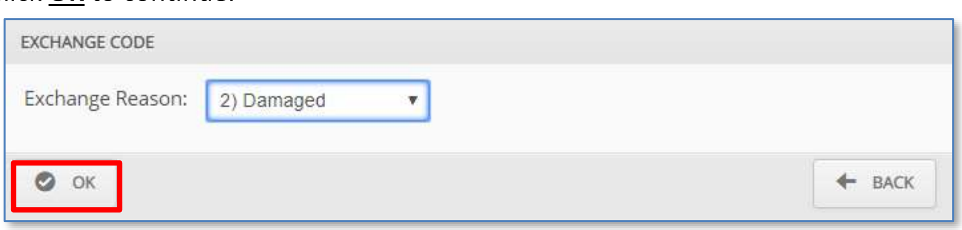
Please Note: Employees that do not have the proper security clearance to change the Cash Price will not see this screen.



Select the Exchange Reason from the pick list.



Click **OK** to continue.



The Switch Out receipt will print with the following information.

- Customer Information
- Agreement/Ticket Number
- The original unit will be shown as the "Old Item" and the replacement unit will be shown as the "New Item"
- The Exchange reason
- Signature lines for Employee and Customer


Store 1 cynergi training

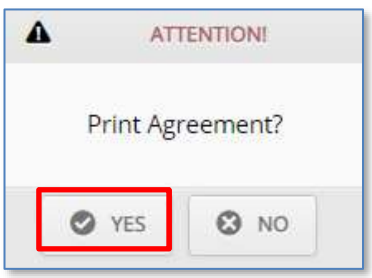
ANYTOWN, TX
(555)555-5555
Customer:
AARON JONES
7765 S SUMMIT PEAK DR
ANYTOWN ,TX 55555

Ticket Nbr: 362059
Old Item: SOFA/LOVESEAT LSASH2660138/35 ULSON/DUNE
New Item: SOFA/LOVESEAT LSUN16485 ANY PEWTER
Why Exchanged: Item Damaged
Salesman: 998
Inventory Transferred To; Returned Item: 1 New Item: 9001

ASK ABOUT OUR MONTHLY SPECIAL
5002992 2/01/19
Home Phone: (555)555-5555

Delivered By: ______________________ Received By: ______________________

A prompt with the option to **Print Agreement** will appear. It is recommended to answer **YES** to print the agreement and have the customer re-sign to approve of the inventory Switch Out.



The Switch Out is now complete.

Switch Out Security Controls

Security Maintenance (**SECMNT**) has three employee security settings available for Switch Out control.

1) **Exchng RTO Item**
   - **If set to Y:** Allows users to select option 8 to Switch Out Inventory from the store menu.
   - **If set to N:** The user will be shown the message "**Sorry-Switch Out Not Permitted**."
2) **Override SO Rule**
   - **If set to Y:** Allows users to override the "Rules." There are two Built-In "Rules" involved in the Switch Out process:

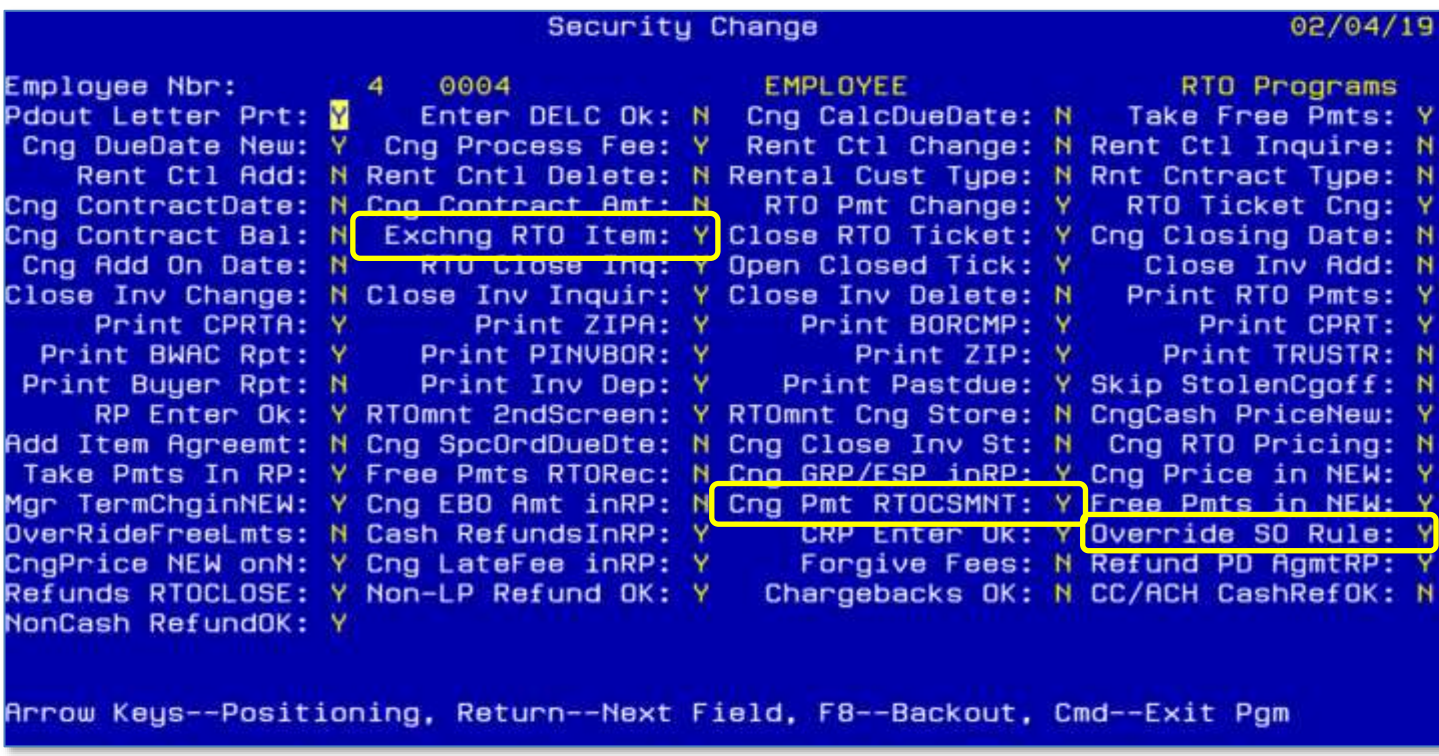
     Rule 1: Inventory items that are Switched Out are **required to have the same Product Code**.

     Rule 2: The **Remaining Book Value of the new item cannot be greater than $100.00** above the old item.

The new Unit that is chosen to Switch Out with the Original unit must have a Remaining Book Value that is not more than $100.00 above the Original Unit's Remaining Book Value. If Override SO Rule it is set to "Y," the program will not enforce either of these "Rules."

3) **CngPmt RTOCSMNT**
   - **If set to Y:** Allows users to **change the payment amount** of the new unit which forces recalculations of all units on the Agreement/Ticket and recalculates the Agreement/Ticket amounts as well (Payment amt, GRP, Tax, etc.). This setting also controls whether the user can **change the Cash Price** of the new unit/rental agreement during the Switch Out process.

The security settings are located on page 4 of SECMNT (Security Maintenance) as seen below.

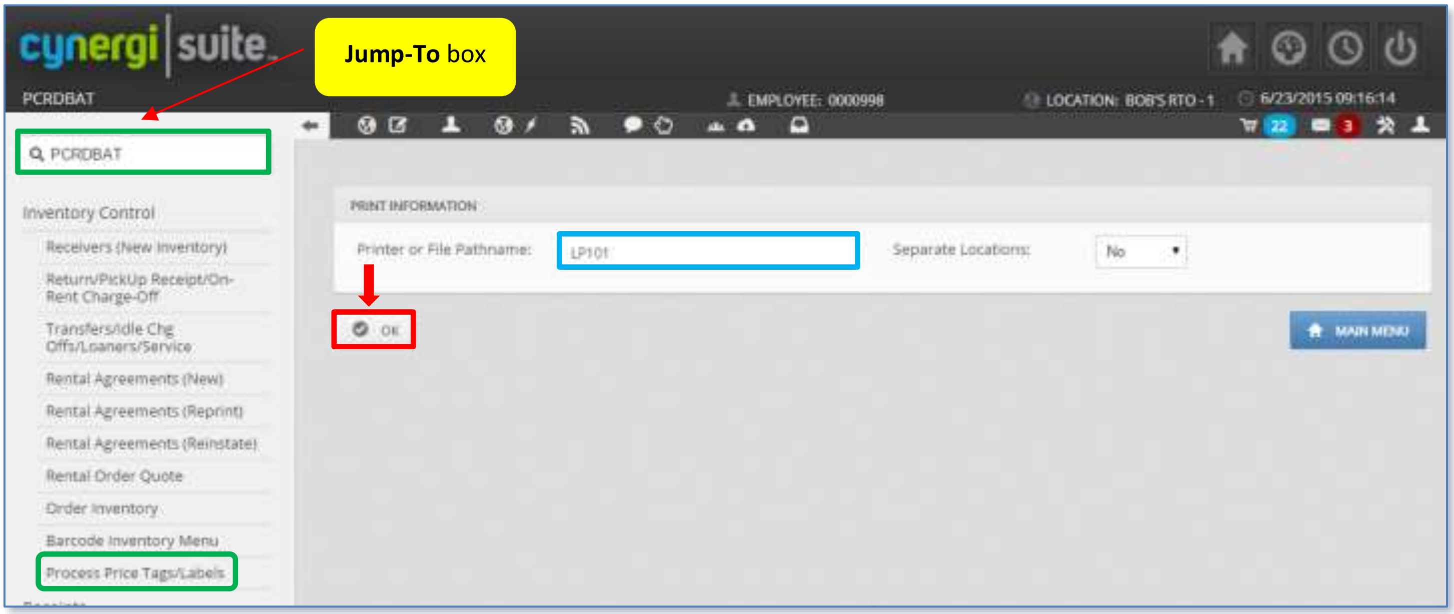


Printing Price Tags

The cynergi|suite store system has two print options for printing single unit price tags:
- **Batch:** Create multiple price tags and save in a batch to print later
- **On Demand:** Print one price tag at a time immediately to the printer

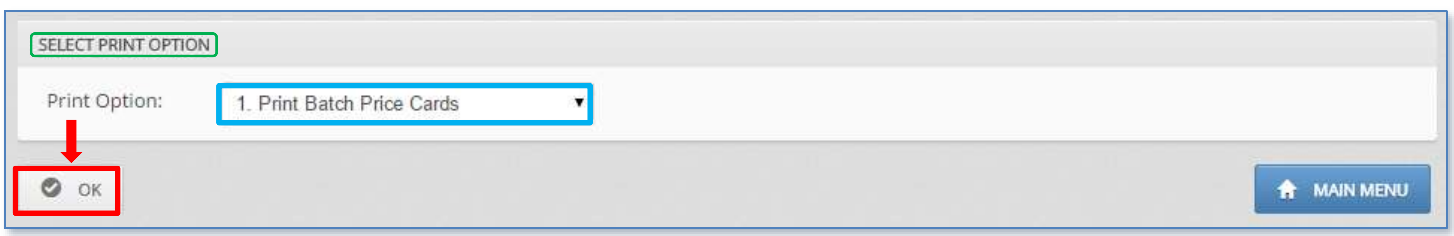
To begin, type **PCRDBAT** into the ***Jump-To*** box and press the **TAB** or **ENTER** key. You may also select it from your company's cynergi|suite menu.
Please Note: Your menu option may be different from what is shown below.

The **Printer or File Pathname** will default to the store printer, which may be changed if needed. Click **OK** to continue.



Batch

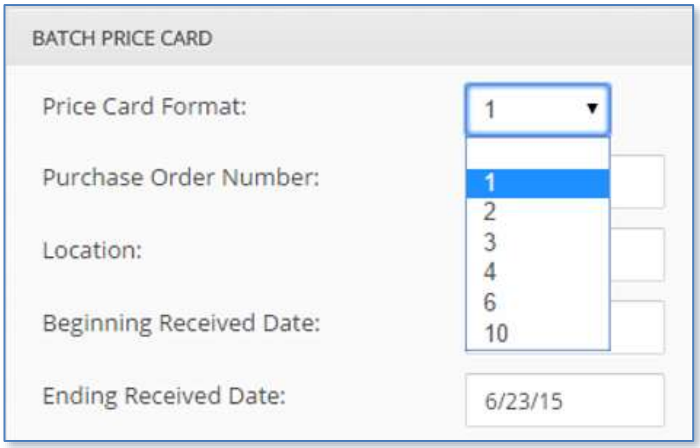
Select the Price Tag print method from the pick list, Example: **1. Print Batch Price Cards**. Click **OK** to continue.



Begin by selecting the *Price Card* Format.
Please Note: The following are typical price tag formats that are available in cynergi|suite. Price Tags are custom built for each company, and may use a specific format.

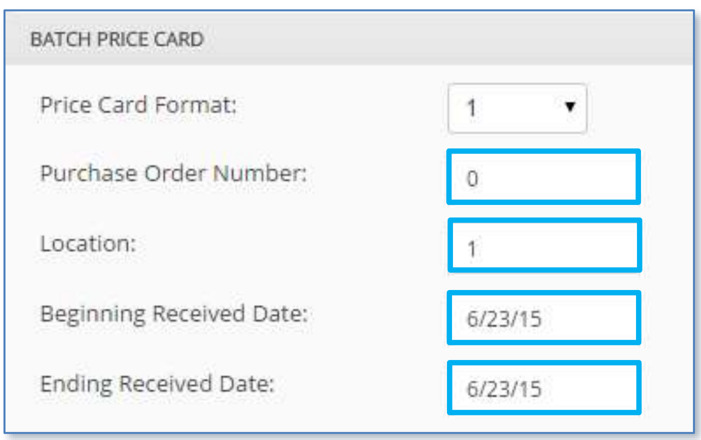
1 = 1 Single price tag card **(this is the default and most typically used)**
2 = 2 Single price tags per sheet
3 = N/A used only for custom programming
4 = 4 Single price tags per sheet
6 = N/A used only for custom programming
10 = N/A used only for custom programming

Leave the default setting of **1** or select the appropriate price tag format from the drop-down pick list.
Press **TAB** or **ENTER** to continue.

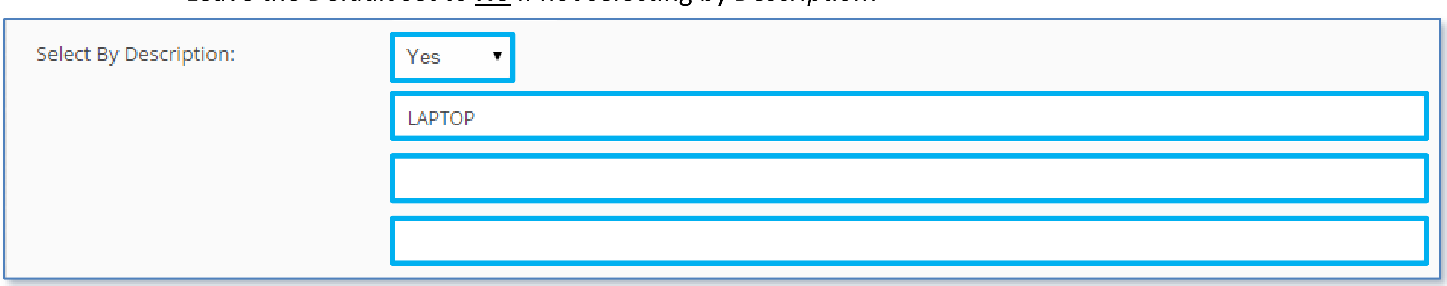


Press **TAB** or **ENTER** to move through the optional fields.

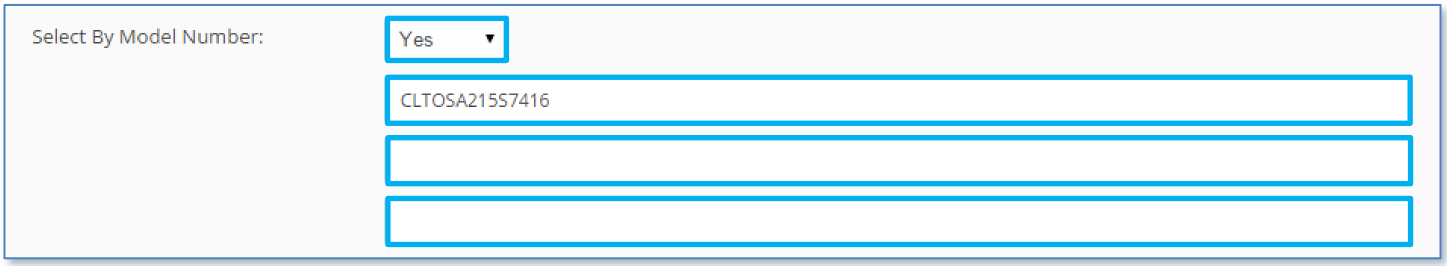
- **Purchase Order Number:** Enter a PO number to print price tags for all units received on a specific PO, otherwise leave set to zero.
- **Location:** Will default to the store the user is logged into.
- **Beginning Received Date:** To print price tags for all units received between two dates, enter the beginning date.
- **Ending Received Date:** To print price tags for all units received between two dates, enter the ending date.
  Please Note: The Beginning and Ending Received Dates can control the search function in batch mode.
  ***Example:** To print price tags for all units of a specific Description or Model Number would require the Beginning Received Date to be blank and the Ending Received Date to be todays date.*



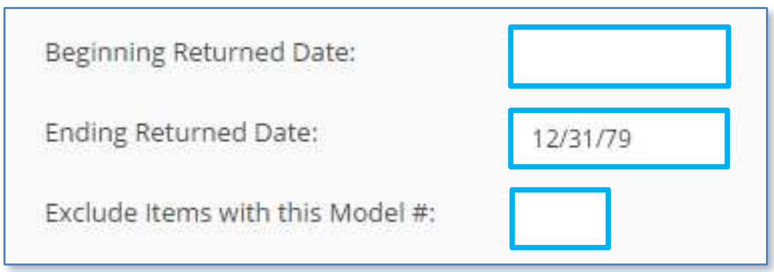
- **Select By Description**: To select by *Description*, select **Yes** from the pick list and enter the *Description*. There are three Description lines available.
  - Leave the Default set to **No** if not selecting by *Description*.



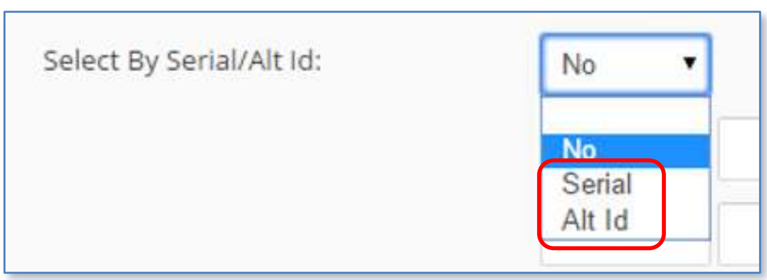
- **Select By Model Number**: To select by *Model Number*, select **Yes** from the pick list and enter the *Model Number*. There are three Model Number lines available.
  - Leave the default set to **No** if not selecting by *Model Number*.



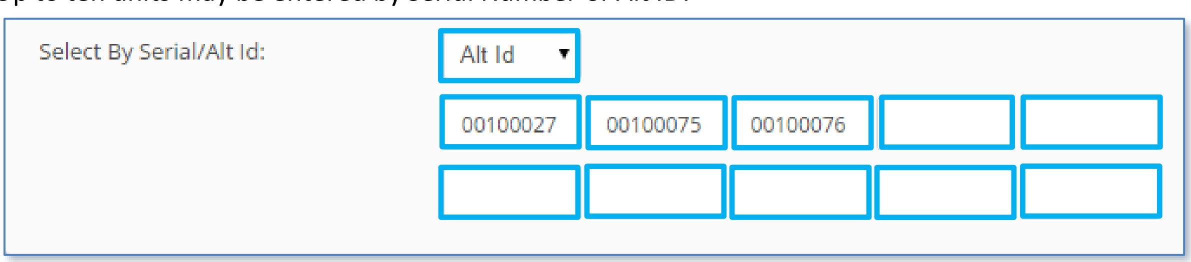
- **Beginning Returned Date**: To print price tags for all units returned between two dates, enter the beginning date.
- **Ending Returned Date**: To print price tags for all units returned between two dates, enter the ending date. *<u>Please Note</u>: The 12/31/79 = End of Time in the cynergi|suite store system*.
- **Exclude Items with this Model #:** To exclude units by Model Numbers beginning with a single letter.
  - *<u>Example</u>: Entering an "A" would exclude all units with Model Numbers beginning with an "A."*



- **Select By Serial/Alt Id**: Batch price tags can be printed for units using the ***Serial Number*** or the ***Alt ID*** number. To continue, select the format from the pick list.



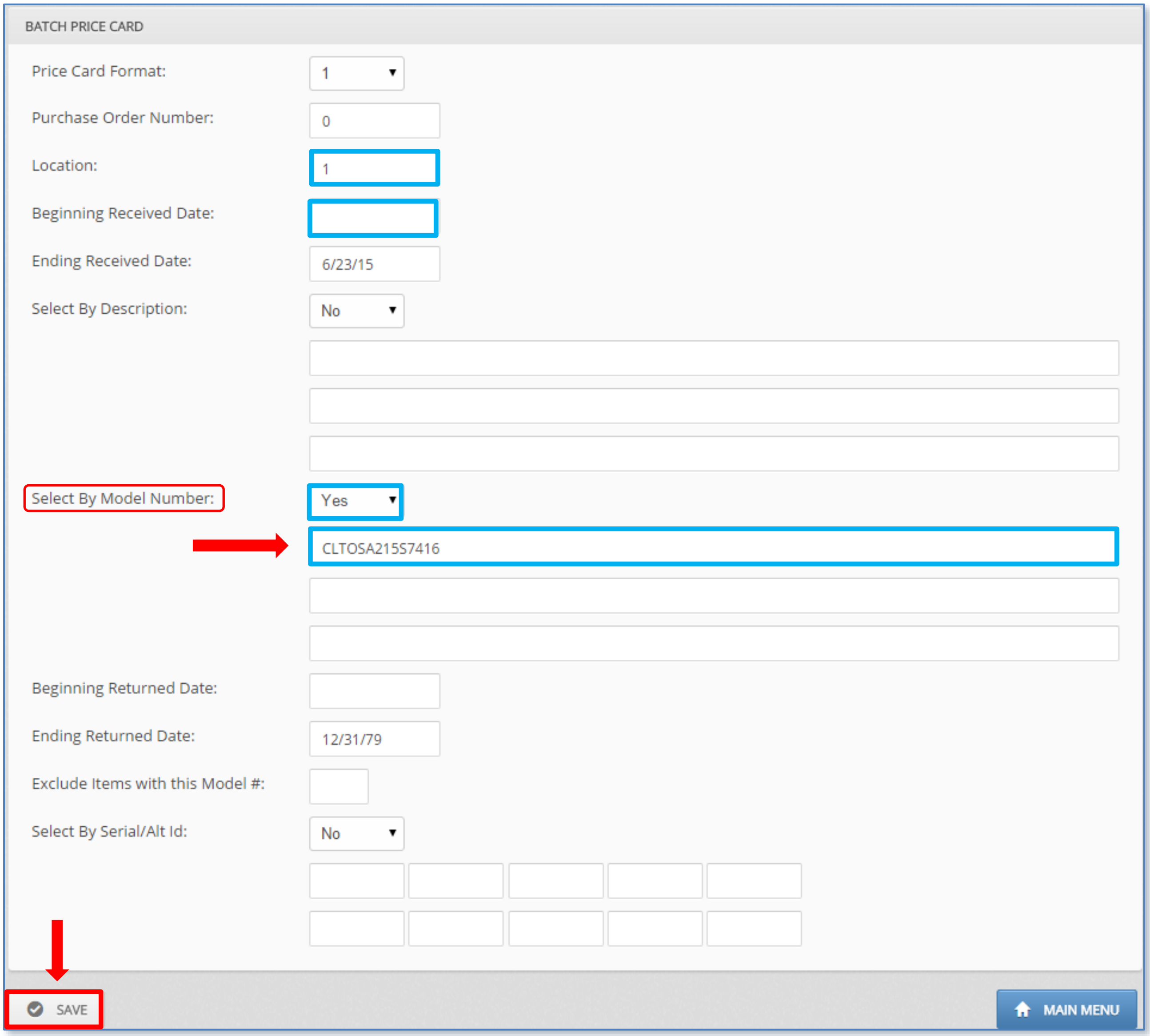
Up to ten units may be entered by *Serial Number* or *Alt ID*.



Price Tag – Batch Mode Example

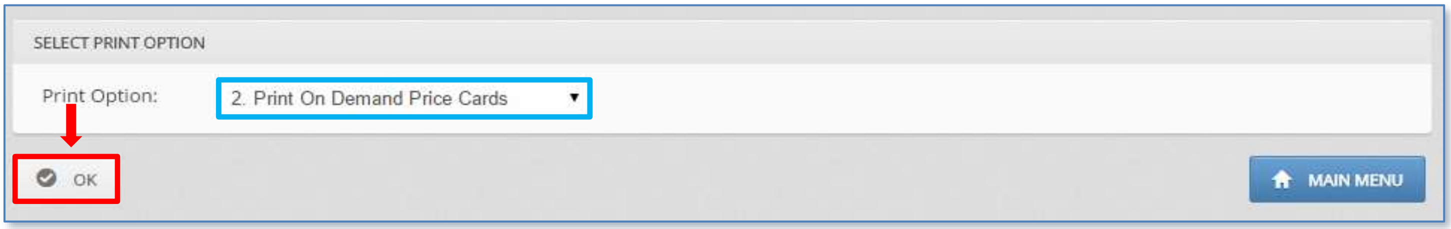
Below is an example of printing price tags for all inventory units with Model Number *CLTOSA215S7416* in Store 1.

When all of the selections are complete, click **SAVE to begin printing the *Batch Price Tags***.



On Demand

Select the Price Tag print method from the pick list, Example: **<u>2. Print On Demand Price Cards</u>**. Click **<u>OK</u>** to continue.



Begin by selecting the *Price Card* Format.

<u>Please Note</u>: The following are the typical price tag formats that may be available in cynergi|suite. Price Tags are custom built for each company, so your company may use only one specific format.

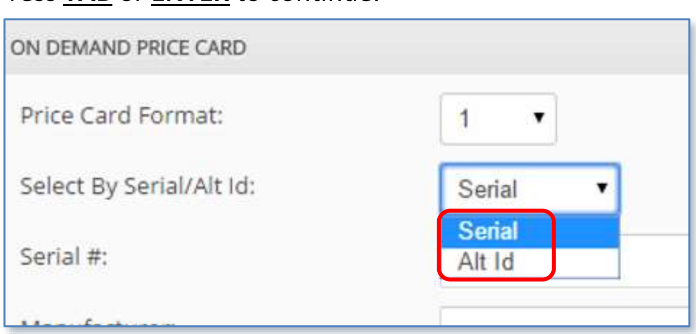
1 = 1 Single price tag card **(this is the default and most typically used)**
2 = 2 Single price tags per sheet
3 = N/A used only for custom programming
4 = 4 Single price tags per sheet
6 = N/A used only for custom programming
10 = N/A used only for custom programming

Leave the default setting of **<u>1</u>** or select the appropriate price tag format from the drop-down pick list.
Press **<u>TAB</u>** or **<u>ENTER</u>** to continue.

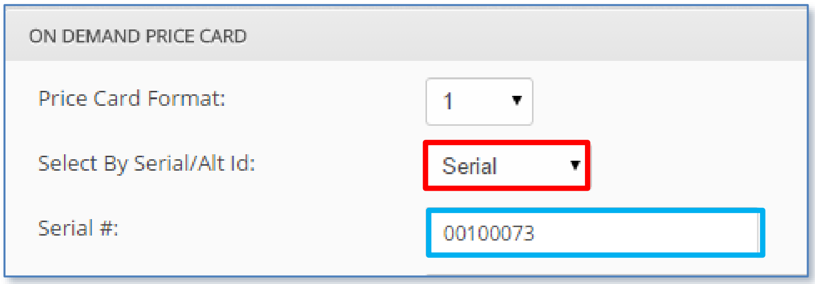
Select the appropriate inventory Identifier from the pick list

- **Serial:** Will look up the inventory unit by serial number
- **Alt ID:** Will look up the inventory unit by the Alternate ID number

Press **<u>TAB</u>** or **<u>ENTER</u>** to continue.



Enter the inventory unit serial number. Press **TAB** or **ENTER** to continue.
Please Note: This example is using a serial number.



The Remaining Fields will automatically be populated using information pulled from the unit's *Model Number*.

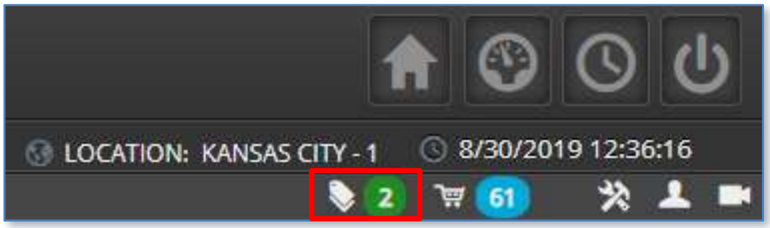
- Press **TAB** or **ENTER** to move through the fields to enter *Feature Descriptions*. Feature descriptions will automatically be populated from the Model Number.
  - *Please Note: If Feature Descriptions were not entered when the Model Number was created, these fields will be blank but can be edited. There are up to 60 characters available.*
- *Rental Rates*, *Terms*, and *Cash Price* may be changed with proper security.

Click **SAVE** to print the *Price Tag*.

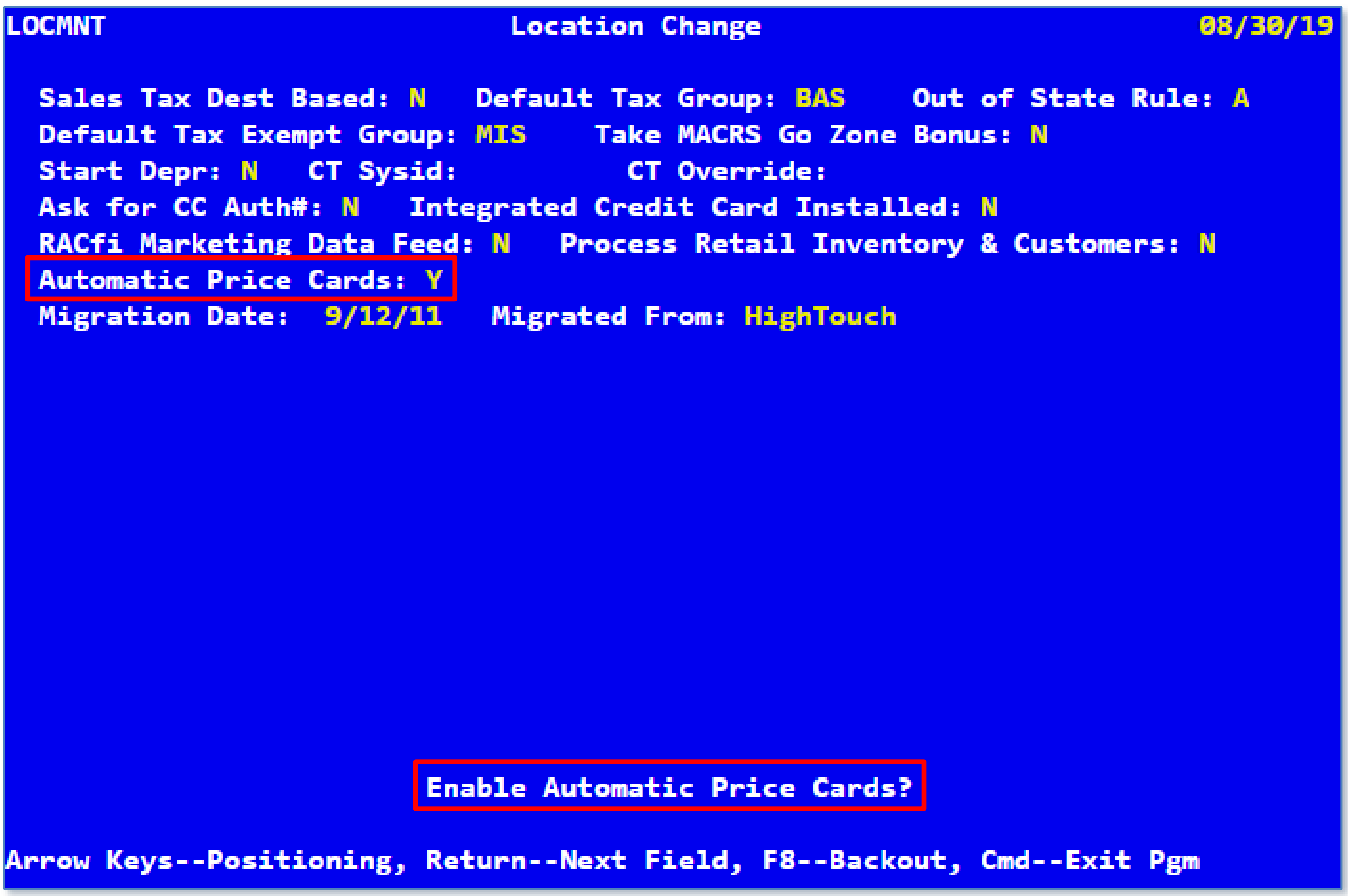
Sample Price Tag

Automatic Price Cards

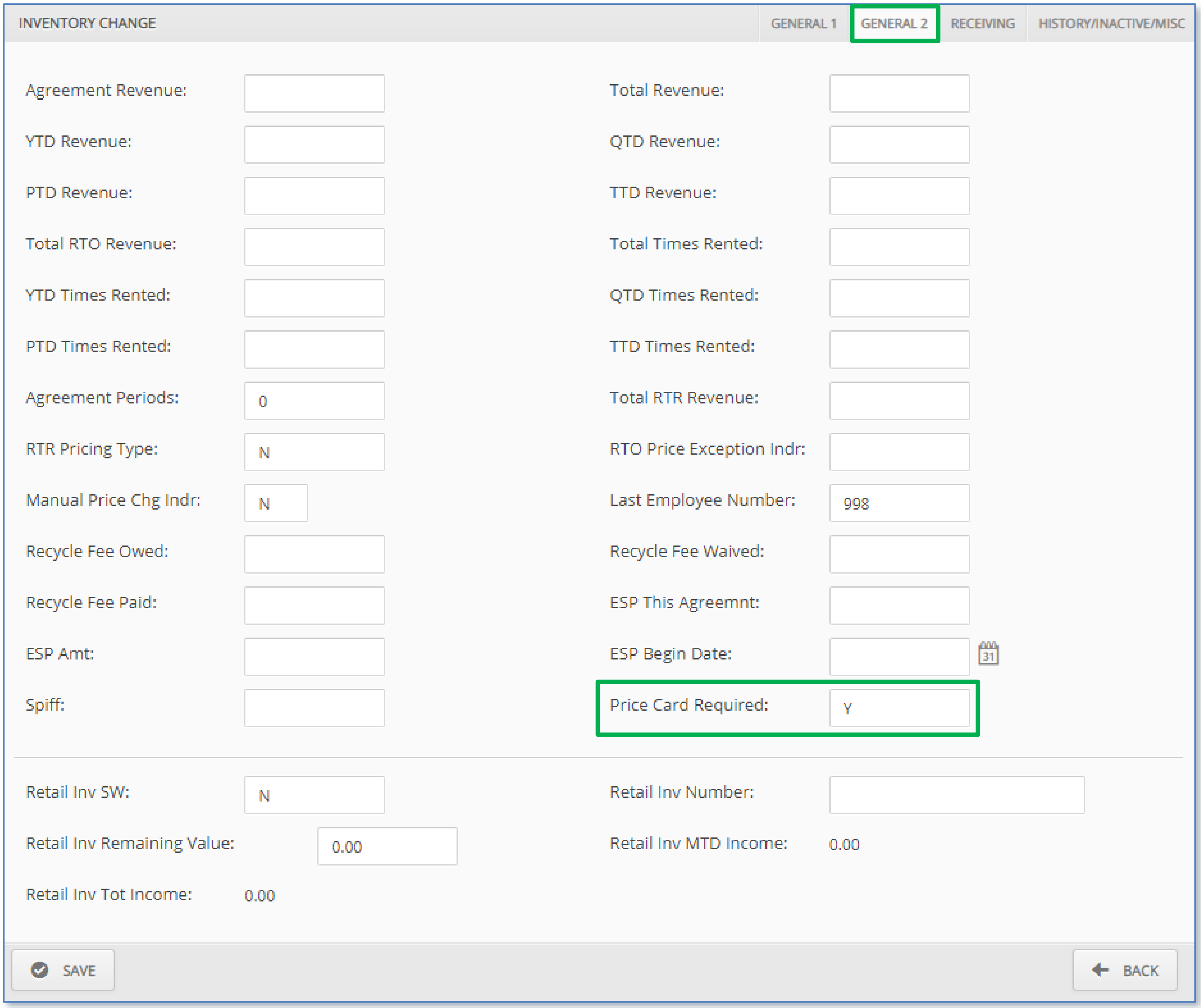
Automatic Price Cards will notify store employees of price changes to inventory in their store so that they can print updated price cards as needed. A new icon on the cynergi|suite app bar displays a count of the number of price cards to be printed. This new **Price Tags** icon will allow the store employees to easily initiate the price card print process.



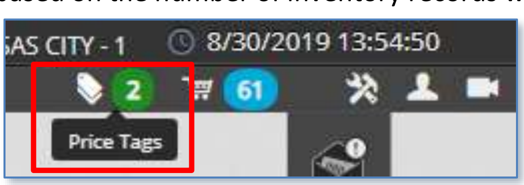
This feature is enabled by location. Type **LOCMNT** in the ***Jump-To*** box. Select your location and go to the second screen. Enable **Automatic Price Cards** by setting this switch to "**Y**."



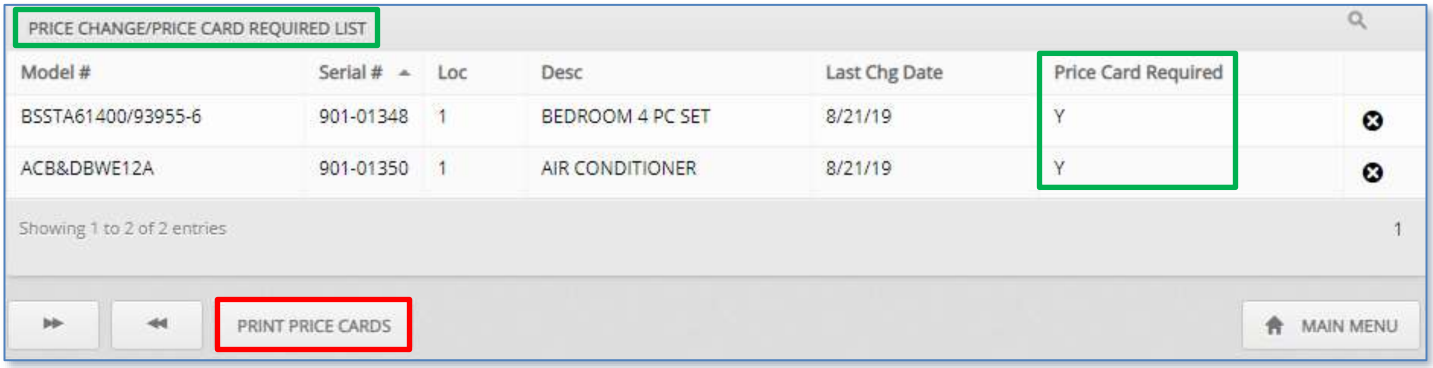
When a price is changed in cynergi|suite, a switch on the inventory serial # record is set to a "**Y**." It is accessible within Inventory Maintenance (**INVMNT**) on the GENERAL 2 tab.



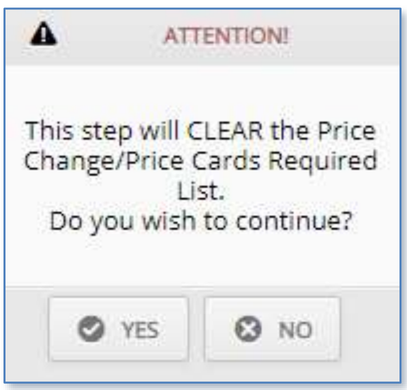
The app bar now has a **Price Tags** icon. The icon will display the count of price cards required to print. The count is based on the number of inventory records with the "**Y**" switch and is only for the location you are logged in to.



Click on the **Price Tags** icon to go to the **Price Change/Price Cards Required List** for your location. Here, you can view a list of all the price cards required. You can sort (by clicking on a column heading), search, and remove items from the list prior to printing. When ready, click on the **PRINT PRICE CARDS** button.

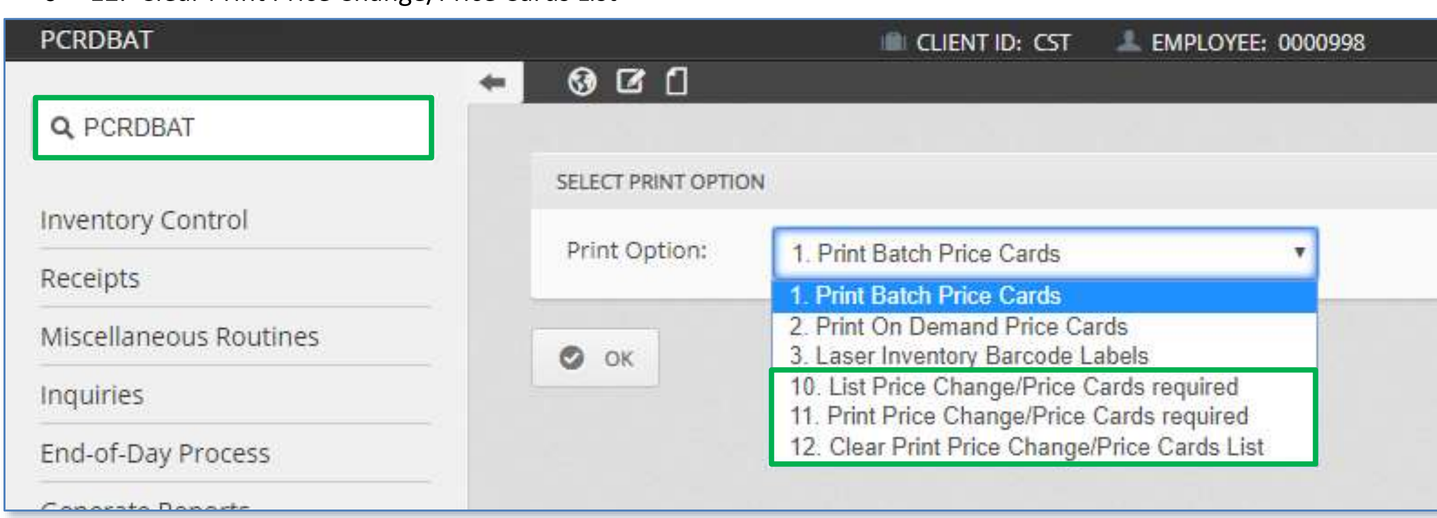


After printing is complete, a prompt displays to **CLEAR** the **Price Change/Price Cards Required List**. If "**YES**" is selected, the "**Y**" on the Price Card Required field *will be erased* from the inventory records. If "**NO**" is selected, those inventory items will remain in the list and can be printed again.



When the **Automatic Price Cards** feature is set to "**Y**" on **LOCMNT**, *new* options 10, 11, and 12 will display in the Process Price Tags (**PCRDBAT**) list. Instead of clicking on the **Price Tags** icon, options 10, 11, or 12 can be selected.

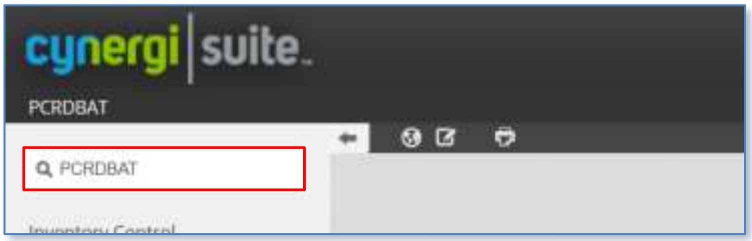
- 10. List Price Change/Price Cards required
- 11. Print Price Change/Price Cards required
- 12. Clear Print Price Change/Price Cards List



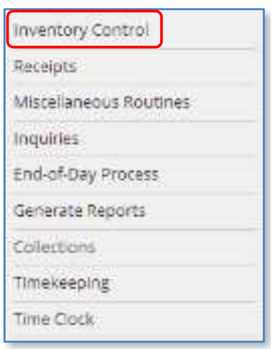
Barcoding and Idle Inventory Audit

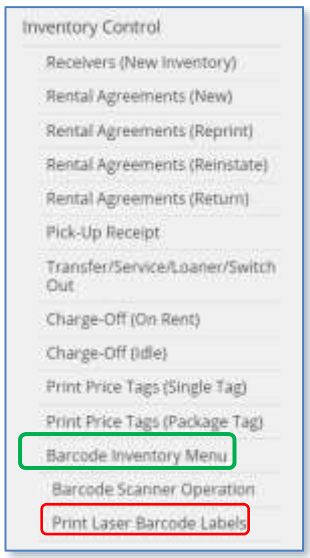
Printing Barcode Labels

*Method shown for printing Barcode Labels using **label stock of 7 labels per sheet** (High Touch Item # 5065).*
To print Barcode Labels, start at the cynergi|suite home screen and type **PCRDBAT** in the ***Jump-To*** box.

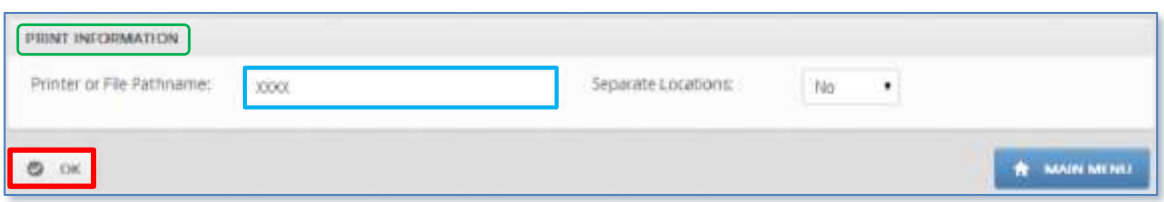


Barcode Labels may also be printed using the menu. Begin by clicking the **Inventory Control** menu option, then click **Barcode Inventory Menu**, then click **Print Laser Barcode Labels** (**PCRDBAT**).
<u>Please Note</u>: Menu selections may vary by client and by user's security.

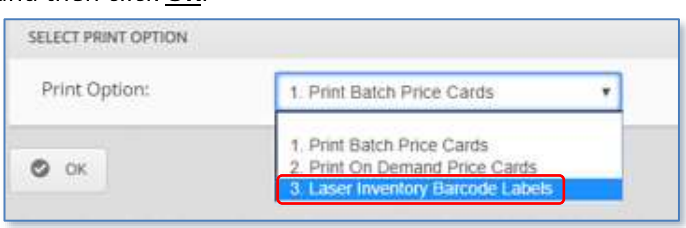




The ***Print Information*** screen will appear. The Printer name will be populated with the default printer name.
Click **<u>OK</u>** to continue.



From the ***Select Print Option*** pop-up screen, select option **<u>3. Laser Inventory Barcode Labels</u>** from the drop-down menu and then click **<u>OK</u>**.

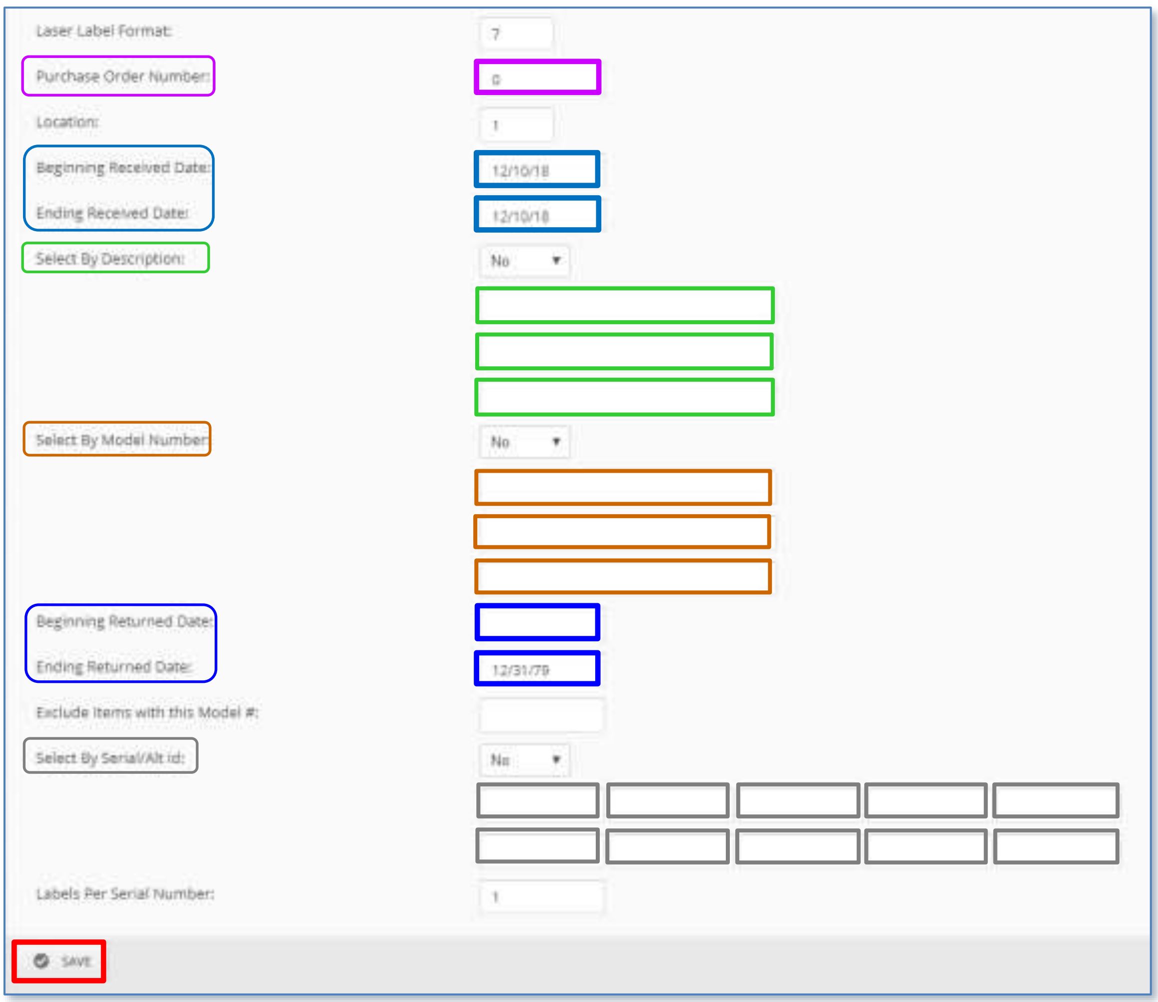


Printing Options for Barcode Labels

From the ***Laser Inventory Barcode Label*** screen, the following options available for printing the Barcode Labels:

- **Purchase Order (PO):** Enter a PO number to print barcode labels for all units received on a specific purchase order.
- **Received Date Range**: Enter a Beginning and Ending “Received Date” to print labels for items received into the store between the dates entered.
- **Description:** Provides the option to print labels by Model “Description 1” (Up to three Descriptions available).
- **Model Number**: Provides the option print labels by cynergi|suite Model Number (Up to three model numbers available).
- **Returned Date:** Enter a Beginning and Ending “Returned Date” to print labels for items returned from rent.
- **Serial/Alt ID**: Allows printing individual labels by unit **Serial** or **Alt Id** number.

1) **Enter the criteria.**
2) **Load the laser printer with the barcode labels.**
3) Click **SAVE** to print the labels.



Printing Barcode Labels when Units are Returned from Rent

Cynergi|suite can be configured to print a barcode label for each unit being returned (picked up) while closing a Rental Agreement through **RTOCLOSE**.
When an agreement is closed click **YES** to print the barcode label.

Configuration: With proper security, within **RENTCTRL** set the ***Close Agrmt Barcode Option*** Indicator to **B**.

Idle Inventory Audit Process

Cynergi|suite offers the option for several different types of Barcode scanner equipment to be used. The method depicted in the steps shown will be for when using ***Symbol*** or ***JANAM*** barcode scanners.

Step 1: Scan Barcode Labels of Inventory in the Store

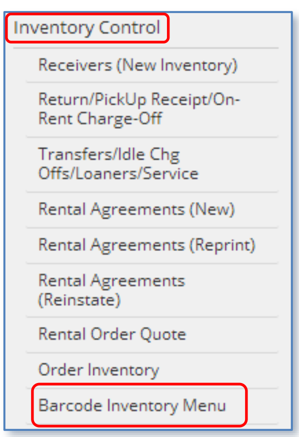
On the Barcode Scanner, begin by tapping the **C|S Inventory** icon, then tap the **Inventory** button. From here, tap the **Idle** button. The scanner is now ready to begin scanning.

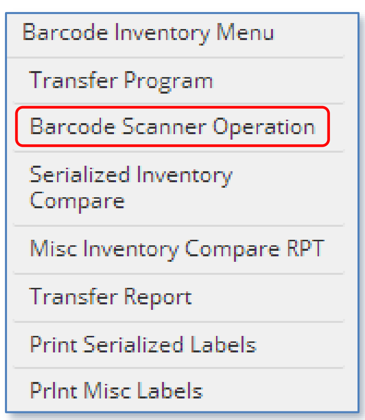
Please Use Caution: Always check the scanner for inventory listed from a previous inventory audit.
If inventory scans from a previous audit are found, the old data must be cleared before proceeding. Use the ***Clear Scanned Data from System*** option which is found in the ***Barcode Scanner Operations*** menu (the *barcode scanner must be attached to the cable/cradle to perform the process*).

To scan, aim the scanner at the barcode label and press the Yellow/Orange **Scan** button. If the scan is successful, the hand-held device will make a high-pitched chirp. If the scan is unsuccessful, the hand-held device will make a low-pitched chirp.

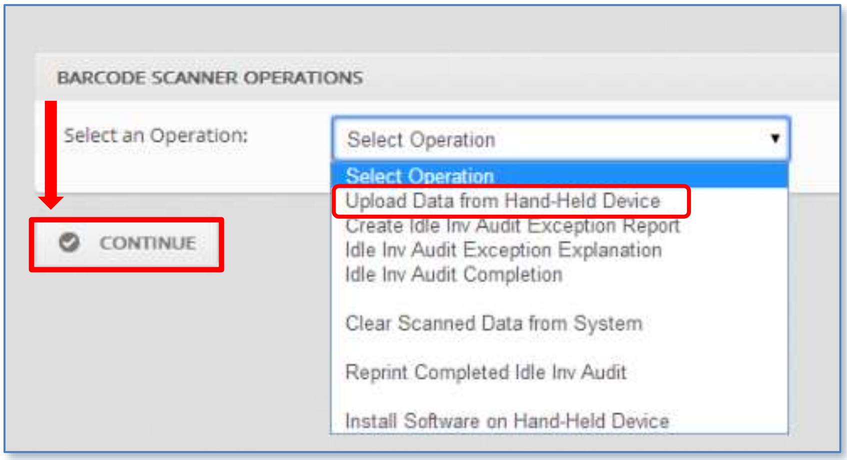
Step 2: Upload Barcode Scans to the Cynergi|suite Server

When finished scanning all inventory units for the audit, the next step is to upload the scanned unit list to the cynergi|suite system to create the Idle Inventory Audit Report. From the menus on the left side, go to the **Barcode Inventory Menu** located under the **Inventory Control** menu and then click on the **Barcode Scanner Operation** option.





To upload the scans from the barcode scanner, select ***Upload Data from Hand-Held Device*** from the drop-down menu, then click **CONTINUE**. The Upload function will transfer the data from the barcode scanner to the cynergi|suite system.

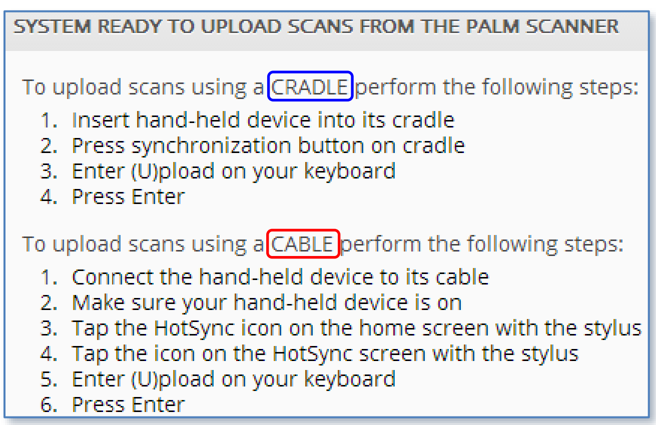


Depending upon type of barcode scanner hardware installed, the scanner will connect to the cynergi|suite system in one of two ways:

- A Barcode scanner is placed into a **cradle** that is connected to the computer.
- A Barcode scanner plugs into a **cable** that is connected to the computer.

Please Note: The **Barcode Scanner Equipment and Connectivity Pictures** *are located at the end of this section.*

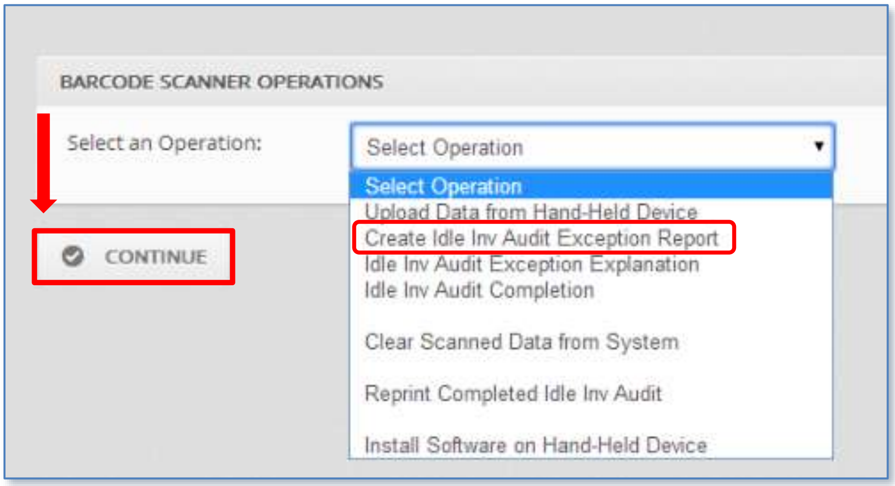
The screen will display instructions for uploading the scans to cynergi|suite. Follow either steps 1 through 4 or steps 1 through 6 depending upon hardware connection type. (Make sure the barcode scanner is securely seated into the cup/cradle or cable.)



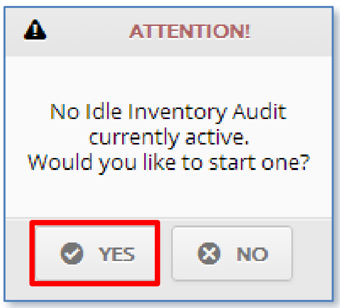
You should hear a chirp when the sync process begins and another chirp when the sync process is complete. There will be a message on the scanner that displays a *HotSync Operation Complete* message.

Step 3: Create Idle Inventory Audit Exception Report

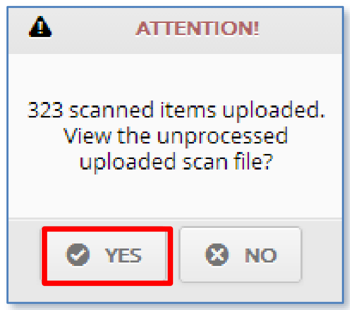
Once data has been retrieved, go back to the ***Barcode Scanner Operations*** menu and select ***Create Idle Inv Audit Exception Report***, then click **CONTINUE**.



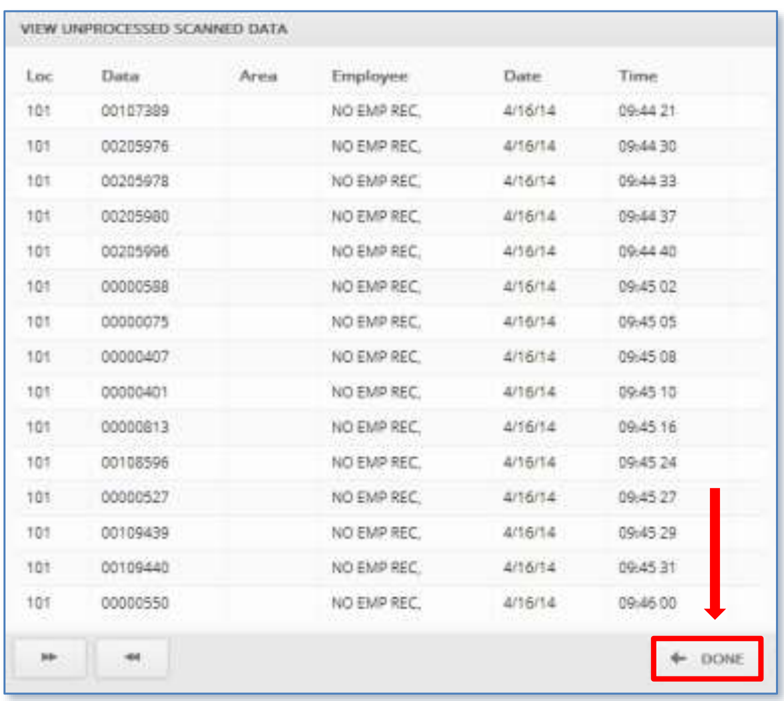
Answer **YES** to the *Attention* prompt.



Answer **YES** to View the unprocessed scan file.



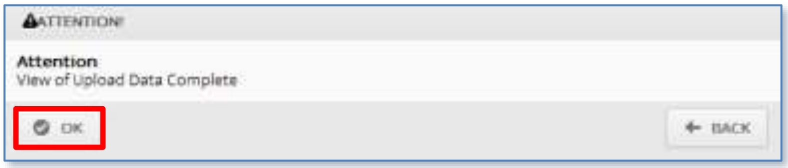
The ***View Unprocessed Scanned Data*** screen will appear displaying the exceptions that will need to be "explained" when completing the audit process. Click **DONE** to continue.


VIEW UNPROCESSED SCANNED DATA

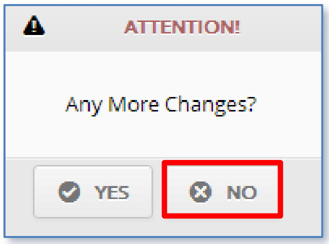
Loc	Data	Area	Employee	Date	Time
101	00107389		NO EMP REC.	4/16/14	09:44:21
101	00205976		NO EMP REC.	4/16/14	09:44:30
101	00205978		NO EMP REC.	4/16/14	09:44:33
101	00205980		NO EMP REC.	4/16/14	09:44:37
101	00205996		NO EMP REC.	4/16/14	09:44:40
101	00000588		NO EMP REC.	4/16/14	09:45:02
101	00000075		NO EMP REC.	4/16/14	09:45:05
101	00000407		NO EMP REC.	4/16/14	09:45:08
101	00000401		NO EMP REC.	4/16/14	09:45:10
101	00000813		NO EMP REC.	4/16/14	09:45:16
101	00108596		NO EMP REC.	4/16/14	09:45:24
101	00000527		NO EMP REC.	4/16/14	09:45:27
101	00109439		NO EMP REC.	4/16/14	09:45:29
101	00109440		NO EMP REC.	4/16/14	09:45:31
101	00000550		NO EMP REC.	4/16/14	09:46:00

DONE

Click **OK** when the ***View of Upload Data Complete*** alert message appears.



At the *Any More Changes* prompt, click **NO**.



Upon clicking the **NO** button, the **Idle Inventory Audit Exception Report** will print on the laser printer.

IDLE INVENTORY AUDIT EXEPTION REPORT EXPLANATION

The scanned data is compared to all inventory records, any discrepancies are reported as exceptions.

- The report will show the exceptions found, (e.g., item on rent, previously scanned, not scanned, in-service).
- The printed report can be used to help reconcile the exceptions. It may be useful for reference when moving around the store/warehouse to investigate exceptions.
- When all "Exceptions" have been resolved/documented, move on to the next step.

Please Note: Only exceptions are reported. Scans that are considered matching (ok) are not shown.

If you find that a unit(s) were missed during the first scan, see Additional Audit Notes at the end of this section.

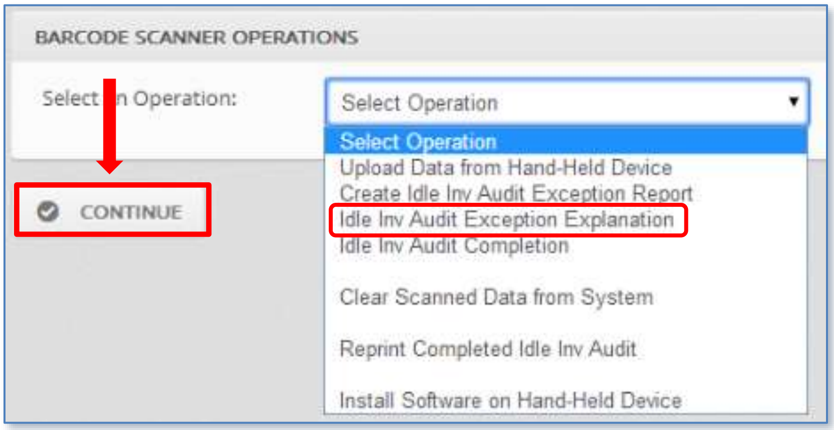
Exceptions:

- **On-Rent** — The unit scanned has a current status/location of "On-Rent."
- **Service** — The unit scanned has a current status/location of "In-Service."
- **Not Scanned** — The store has an idle inventory unit but does not find a matching "scan."
- **Repeat Scan** — The inventory unit was scanned more than once.
- **Inactive** — The inventory unit has an inactive status.
- **Invalid Scan** — The scanned barcode is not the primary unit.
- **Not On File** — There is scanned data for a unit, but unit is not found in the system.
- **Another Store** — The unit belongs to another store/location.
- **Pending XFER** — The unit is in a pending transfer location.

Step 4: Idle Inventory Audit Exception Explanation

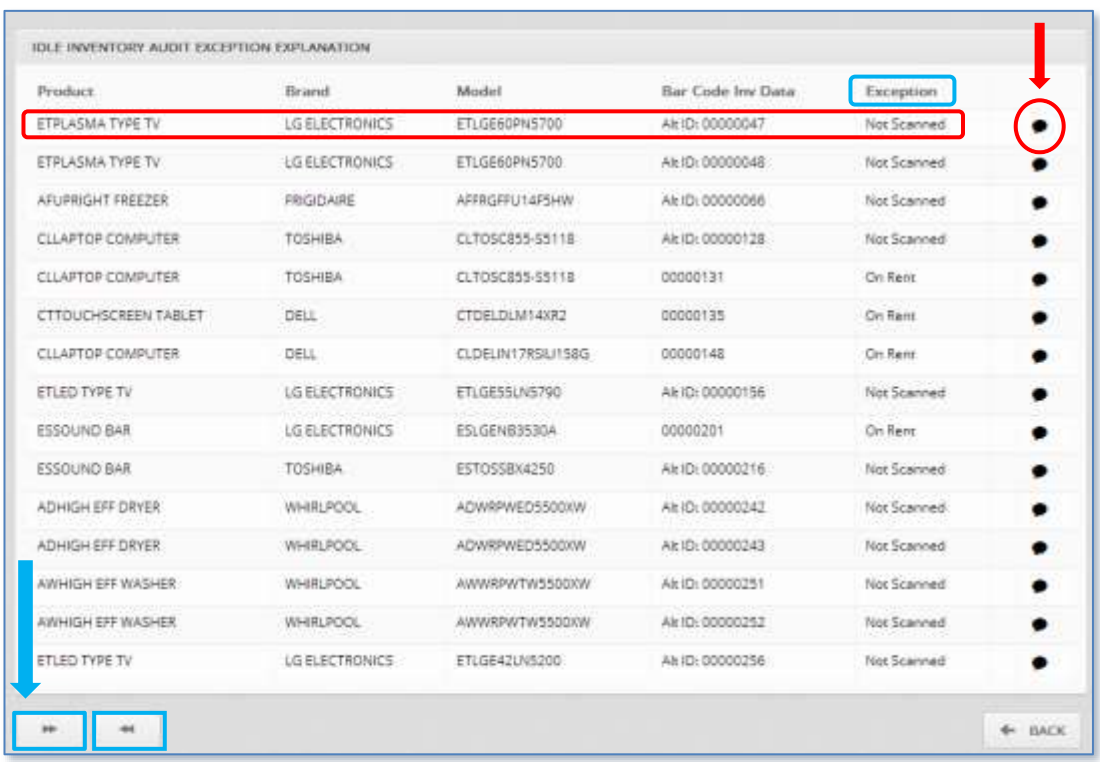
The ***Idle Inventory Audit Exception Explanation*** step is the process used by the auditor to explain the discrepancies (exceptions) found. All exceptions must be explained or resolved before completing the audit.

Go back to the ***Barcode Scanner Operations*** menu. Select the ***Idle Inv Audit Exception Explanation*** option and click **CONTINUE**.



IDLE INVENTORY AUDIT EXCEPTION EXPLANATION

- Each Inventory unit listed will need to have an ***Explanation*** entered before the Audit is completed.
- The exception for each unit can be found under the ***Exception*** header.
- To enter an explanation, click on the **Exception Explanation** icon located on the right side of the screen.
- The **Arrow** buttons at the bottom left will page forward and backward through the list.

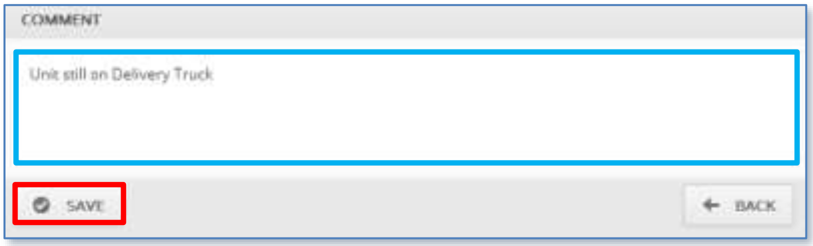


IDLE INVENTORY AUDIT EXCEPTION EXPLANATION

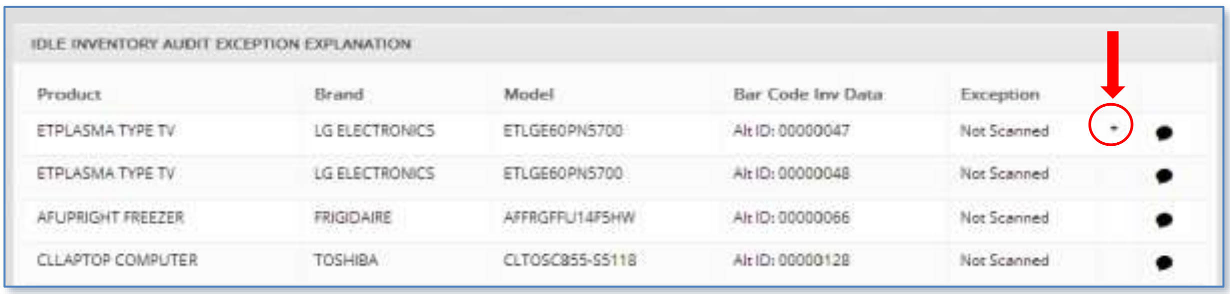
Product	Brand	Model	Bar Code Inv Data	Exception
ETPLASMA TYPE TV	LG ELECTRONICS	ETLGE60PN5700	Alt ID: 00000047	Not Scanned
ETPLASMA TYPE TV	LG ELECTRONICS	ETLGE60PN5700	Alt ID: 00000048	Not Scanned
AFUPRIGHT FREEZER	FRIGIDAIRE	AFFRGFFU14F5HW	Alt ID: 00000066	Not Scanned
CLLAPTOP COMPUTER	TOSHIBA	CLTOSC855-S5118	Alt ID: 00000128	Not Scanned
CLLAPTOP COMPUTER	TOSHIBA	CLTOSC855-S5118	00000131	On Rent
CTTOUCHSCREEN TABLET	DELL	CTDELDLM14XR2	00000135	On Rent
CLLAPTOP COMPUTER	DELL	CLDELIN17RSLI158G	00000148	On Rent
ETLED TYPE TV	LG ELECTRONICS	ETLGE55LN5790	Alt ID: 00000156	Not Scanned
ESSOUND BAR	LG ELECTRONICS	ESLGENB3530A	00000201	On Rent
ESSOUND BAR	TOSHIBA	ESTOSSBX4250	Alt ID: 00000216	Not Scanned
ADHIGH EFF DRYER	WHIRLPOOL	ADWRPWED5500XW	Alt ID: 00000242	Not Scanned
ADHIGH EFF DRYER	WHIRLPOOL	ADWRPWED5500XW	Alt ID: 00000243	Not Scanned
AWHIGH EFF WASHER	WHIRLPOOL	AWWRPWTW5500XW	Alt ID: 00000251	Not Scanned
AWHIGH EFF WASHER	WHIRLPOOL	AWWRPWTW5500XW	Alt ID: 00000252	Not Scanned
ETLED TYPE TV	LG ELECTRONICS	ETLGE42LN5200	Alt ID: 00000256	Not Scanned

BACK

Type in the Explanation explaining why the unit has an Exception**.**
Click **<u>SAVE</u>** to continue



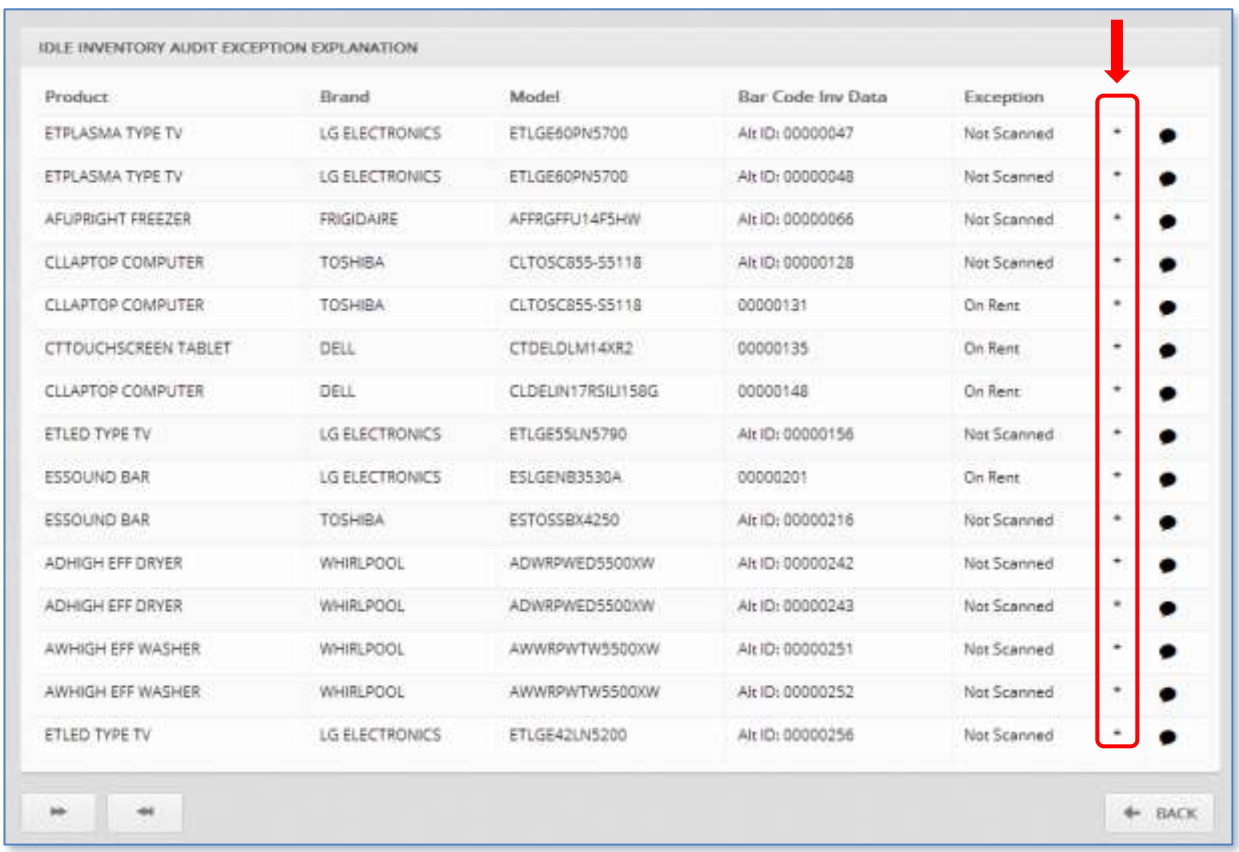
When the **Exception** has been explained, an asterisk will display next to the **Exception** column on the screen. Continue through the list and enter an explanation for each unit.



IDLE INVENTORY AUDIT EXCEPTION EXPLANATION

Product	Brand	Model	Bar Code Inv Data	Exception		
ETPLASMA TYPE TV	LG ELECTRONICS	ETLGE60PN5700	Alt ID: 00000047	Not Scanned	*	
ETPLASMA TYPE TV	LG ELECTRONICS	ETLGE60PN5700	Alt ID: 00000048	Not Scanned		
AFUPRIGHT FREEZER	FRIGIDAIRE	AFFRGFFU14F5HW	Alt ID: 00000066	Not Scanned		
CLLAPTOP COMPUTER	TOSHIBA	CLTOSC855-S5118	Alt ID: 00000128	Not Scanned		

When all Exceptions have been explained, each unit should have an asterisk.



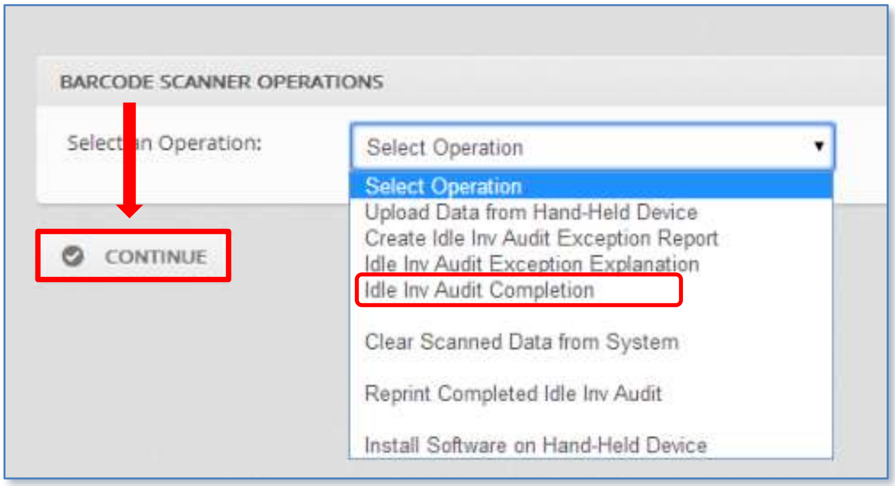
IDLE INVENTORY AUDIT EXCEPTION EXPLANATION

Product	Brand	Model	Bar Code Inv Data	Exception		
ETPLASMA TYPE TV	LG ELECTRONICS	ETLGE60PN5700	Alt ID: 00000047	Not Scanned	*	
ETPLASMA TYPE TV	LG ELECTRONICS	ETLGE60PN5700	Alt ID: 00000048	Not Scanned	*	
AFUPRIGHT FREEZER	FRIGIDAIRE	AFFRGFFU14F5HW	Alt ID: 00000066	Not Scanned	*	
CLLAPTOP COMPUTER	TOSHIBA	CLTOSC855-S5118	Alt ID: 00000128	Not Scanned	*	
CLLAPTOP COMPUTER	TOSHIBA	CLTOSC855-S5118	00000131	On Rent	*	
CTTOUCHSCREEN TABLET	DELL	CTDELDLM14XR2	00000135	On Rent	*	
CLLAPTOP COMPUTER	DELL	CLDELIN17RSILI158G	00000148	On Rent	*	
ETLED TYPE TV	LG ELECTRONICS	ETLGE55LN5790	Alt ID: 00000156	Not Scanned	*	
ESSOUND BAR	LG ELECTRONICS	ESLGENB3530A	00000201	On Rent	*	
ESSOUND BAR	TOSHIBA	ESTOSSBX4250	Alt ID: 00000216	Not Scanned	*	
ADHIGH EFF DRYER	WHIRLPOOL	ADWRPWED5500XW	Alt ID: 00000242	Not Scanned	*	
ADHIGH EFF DRYER	WHIRLPOOL	ADWRPWED5500XW	Alt ID: 00000243	Not Scanned	*	
AWHIGH EFF WASHER	WHIRLPOOL	AWWRPWTW5500XW	Alt ID: 00000251	Not Scanned	*	
AWHIGH EFF WASHER	WHIRLPOOL	AWWRPWTW5500XW	Alt ID: 00000252	Not Scanned	*	
ETLED TYPE TV	LG ELECTRONICS	ETLGE42LN5200	Alt ID: 00000256	Not Scanned	*	

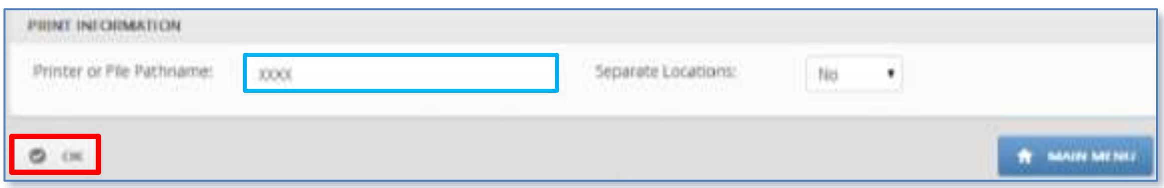
<u>Please Note</u>: If any units were missed when scanning, see **Additional Audit Notes: *Add New Scans to an Open Audit*** *at the end of this section.*

Step 5: Idle Inventory Audit Completion

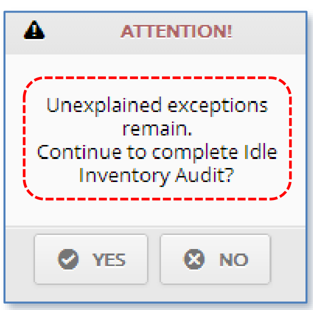
When all Exceptions have been explained, the Audit can be completed. Go back to the ***Barcode Scanner Operations*** menu, select **Idle Inv Audit Completion**, then click **CONTINUE**.



The ***Print Information*** screen will appear. The Printer name will be populated with the default printer name. Click **OK** to continue.

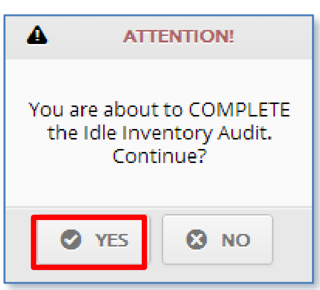


If all Exceptions have NOT been explained, the following message will appear.
Please Note: Depending upon cynergi|suite store system settings, it may be required for all Exceptions to be "Explained" before the audit can be completed.



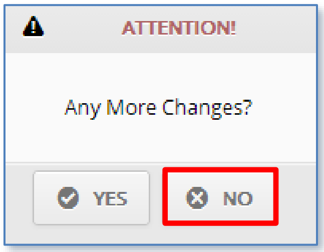
Answer **YES** to complete the audit.

Answer **NO** to go back and complete the ***Exception Explanation*** step if necessary.

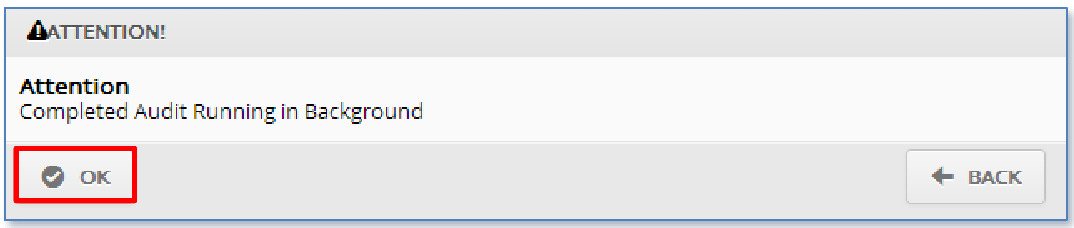


If all exceptions have been explained. Click **YES**.

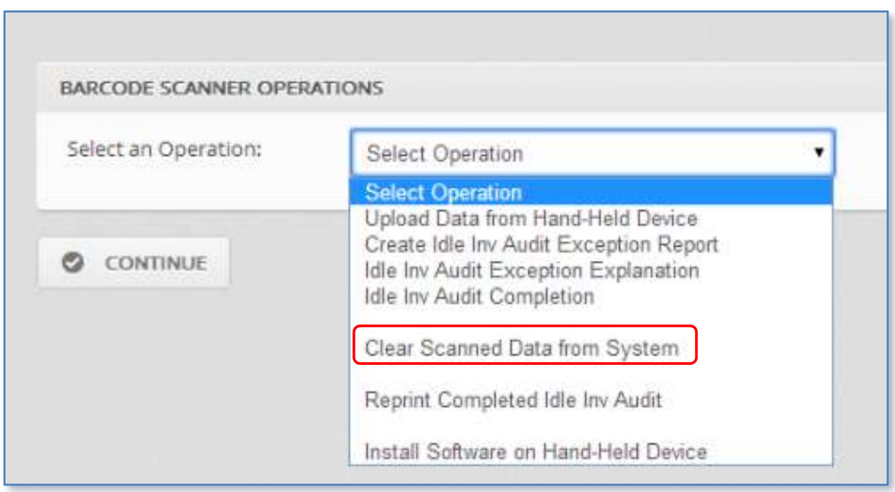
At the *Any More Changes* prompt, click **NO** to continue closing the Audit. The Completed Audit Report will begin printing.



Click **OK** to finish.

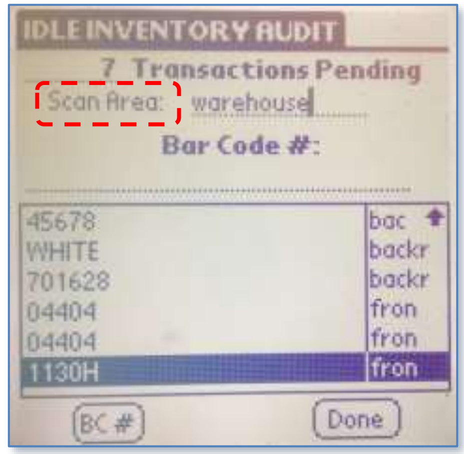


The Audit is now complete. It is advisable to clear the scans from the hand-held device at this time. Use the option **Clear Scanned Data from System** from the **BARCODE SCANNER OPERATIONS** menu.



Scanning Inventory by Area (Optional)

- The cynergi|suite barcoding feature has an additional option that allows a **Scan Area** (or location within the store) to be defined while scanning the idle inventory units.
    - It is beneficial during the audit, especially for larger stores, to be able to reference where in the store the units were initially scanned.
    - This feature is not required to have a successful Barcode Scanning audit.
- How to utilize the **Scan Area** feature
    - While scanning the inventory, tap on the **Area** button at the bottom of the Barcode Scanner.
    - The cursor will move up to the **Scan Area** section just above the Bar Code # on the Barcode screen



    - Click on **ABC** at the lower left-hand corner of the Barcode Scanner screen to bring up the keyboard.

- Type in the area of the store where the units are being scanned (e.g., showroom, backroom, storage unit, video wall, appliance area, etc.) and then begin scanning the inventory units.

- Repeat these steps to define the next **Scan Area**.

Additional Audit Notes

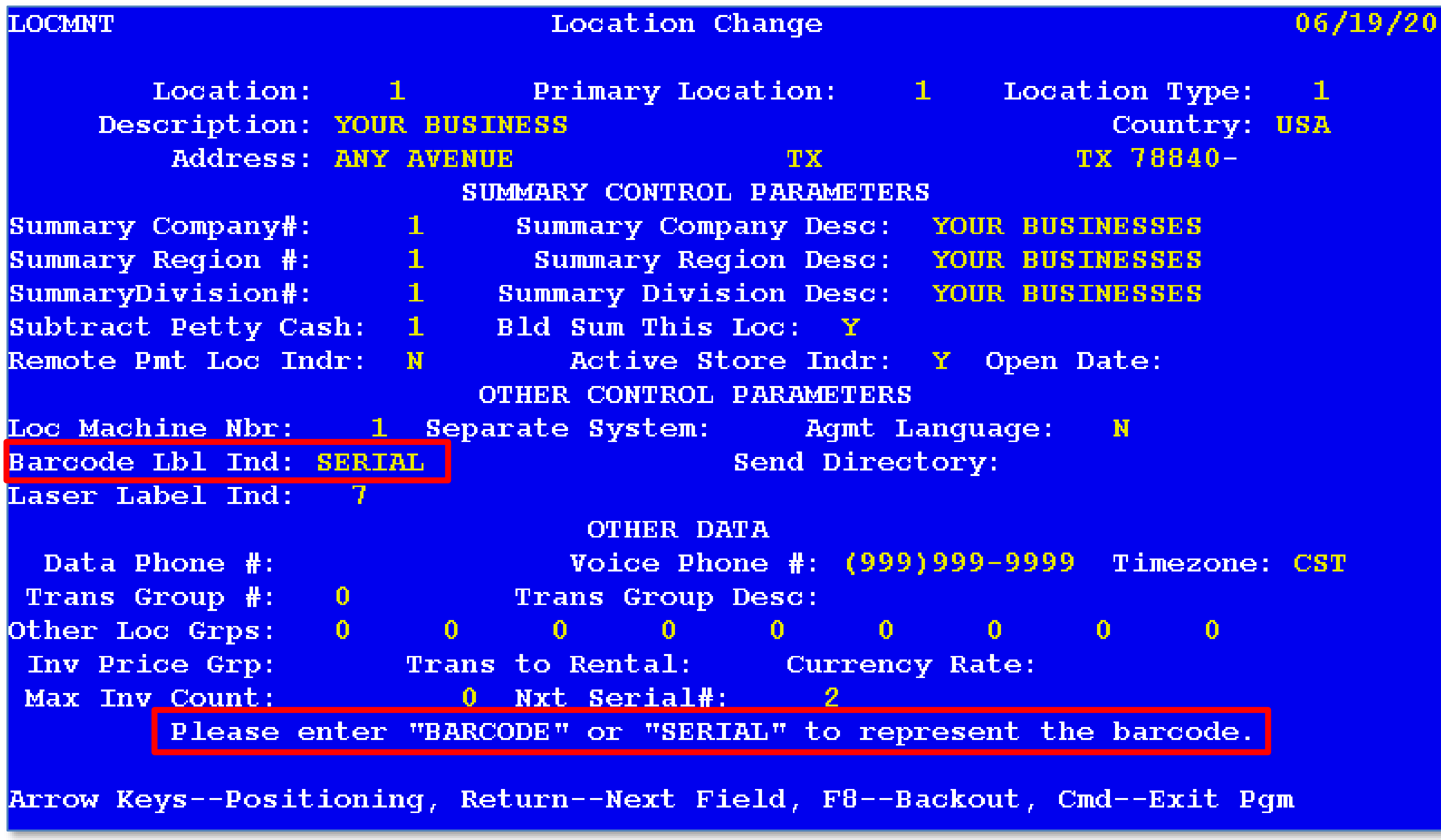
- A previous audit report can be reprinted using the ***Reprint Completed Idle Inv Audit*** option from the Barcode Scanner Operations menu.
- It is advisable to clear the scans from the hand-held device when an Audit has been completed. Use the option ***Clear Scanned Data from System*** from the **Barcode Scanner Operations** menu.
- ***Add New Scans to an Open Audit***: If units were missed during the first scanning, the missed units can be scanned and added to the open audit. Follow the steps below to add new scans to an open audit (using the **Barcode Scanner Operations** menu).
  1) Clear Scanner using option ***Clear Scanned Data from System***
  2) Scan the previously missed units
  3) Upload the scans using option ***Upload Data From Hand-Held Device***
  4) Use option ***Create Idle Inv Audit Exception Report*** (adds the new scans to the existing open audit)
  5) Go back to ***Idle Inv Audit Exception Explanation*** (All units that were previously missed will have their explanation automatically updated to **Unit was not previously scanned**. You can add to the explanation if necessary.)

Barcode Scanner Equipment and Connectivity Pictures

Inventory Scanning App and Audit Dashboard

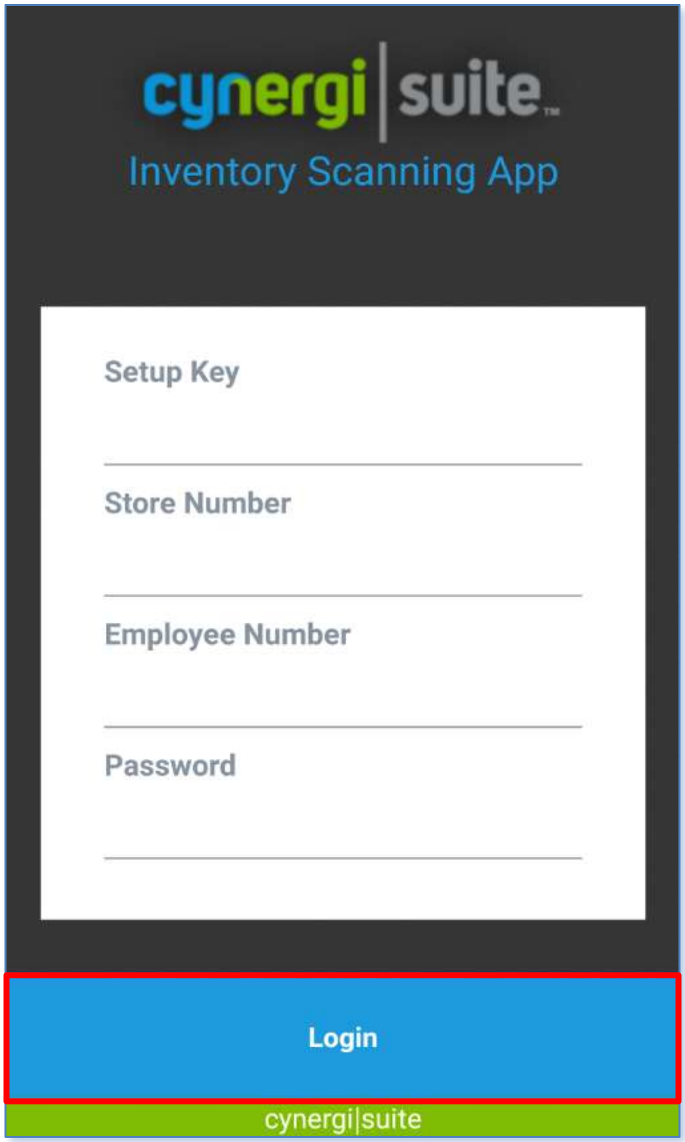
Location Maintenance (LOCMNT) Setup

Before using the cynergi|suite **Inventory Scanning Application**, the system must be set up to determine whether the number associated with the printed barcode is the serial number or the alternate ID (barcode number). The **Barcode Lbl Ind** field is found on the first page of Location Maintenance (**LOCMNT**). This indicator should be "**SERIAL**" if the barcode will be associated with the serial number and "**BARCODE**" if the barcode will be associated with the alternate ID (barcode number).



```
LOCMNT                              Location Change                                06/19/20

        Location:     1        Primary Location:     1     Location Type:    1
     Description: YOUR BUSINESS                                   Country: USA
         Address: ANY AVENUE                TX              TX 78840-
                               SUMMARY CONTROL PARAMETERS
Summary Company#:      1      Summary Company Desc:   YOUR BUSINESSES
Summary Region #:      1       Summary Region Desc:   YOUR BUSINESSES
SummaryDivision#:      1     Summary Division Desc:   YOUR BUSINESSES
Subtract Petty Cash:   1     Bld Sum This Loc:  Y
Remote Pmt Loc Indr:   N         Active Store Indr:   Y  Open Date:
                                OTHER CONTROL PARAMETERS
Loc Machine Nbr:     1  Separate System:     Agmt Language:    N
Barcode Lbl Ind: SERIAL                      Send Directory:
Laser Label Ind:    7
                                      OTHER DATA
  Data Phone #:                  Voice Phone #: (999)999-9999  Timezone: CST
 Trans Group #:   0           Trans Group Desc:
Other Loc Grps:   0     0     0     0     0     0     0     0     0
 Inv Price Grp:        Trans to Rental:      Currency Rate:
 Max Inv Count:             0  Nxt Serial#:     2
         Please enter "BARCODE" or "SERIAL" to represent the barcode.

Arrow Keys--Positioning, Return--Next Field, F8--Backout, Cmd--Exit Pgm
```

Inventory Scanning App



This is the cynergi|suite Inventory Scanning Application.

The Inventory Scanning App can be installed on most Android and Apple devices. This includes phones and tablets, so no proprietary barcode scanning hardware is required. The app can be found in the Google Play and Apple stores, similar to other c|s mobile apps.

Communication is established by wireless or cellular connection, and multiple devices can be used to perform the audit process, saving time.

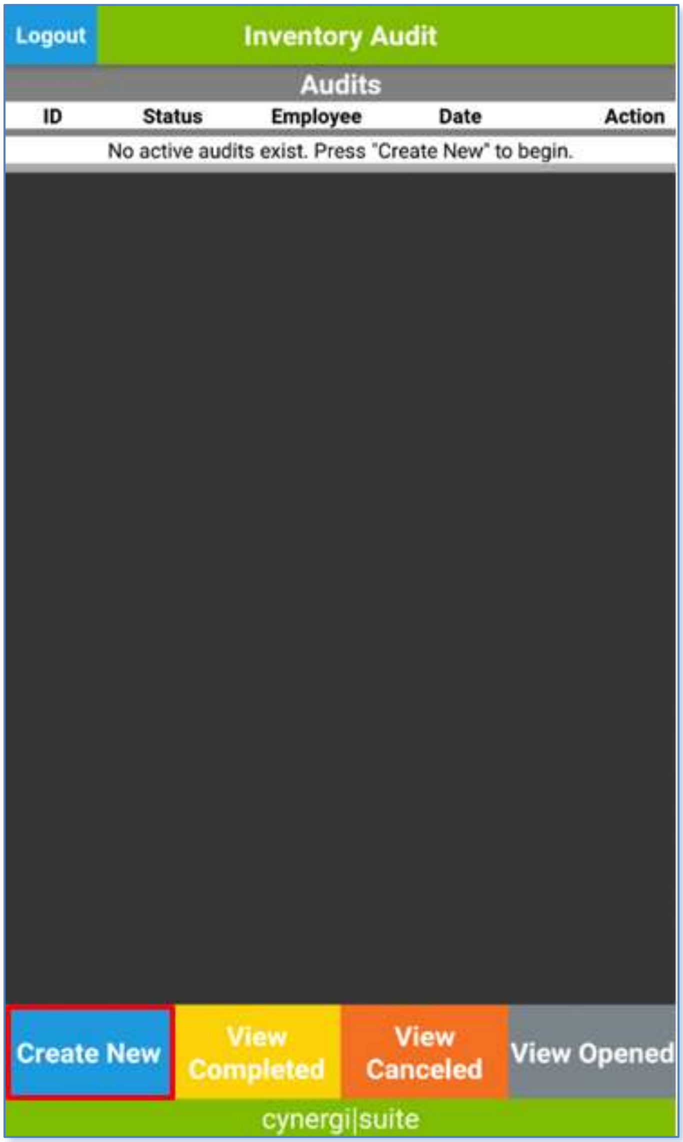
If connectivity is lost during the audit process, the auditor can continue to scan items and the device will automatically sync as soon as connectivity is restored.

Inventory exceptions are created in real-time and the auditor has the ability to explain these on the device at the time of the exception.

Fill out the fields and press **Login**.

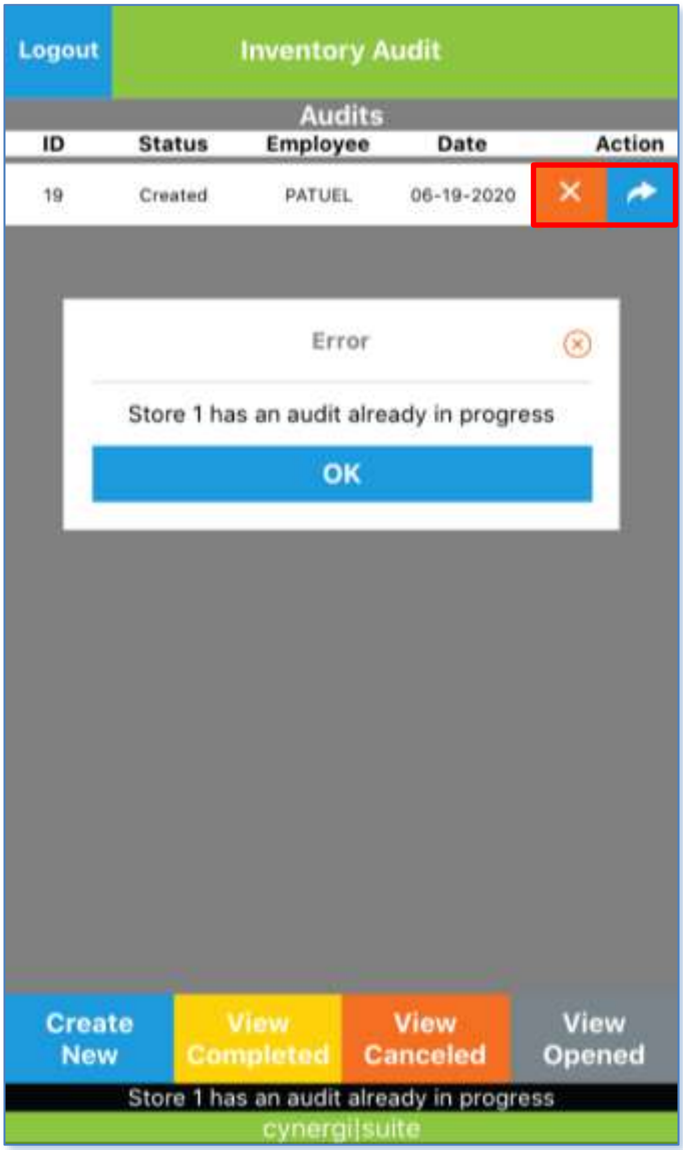
- **Setup Key** – The setup key is six characters. The first three characters are the client ID and the last three characters are the dataset. This information is found at the top of the cynergi|suite screen.

- **Store Number** – Enter the store number your employee record is associated with. For multi-store managers, please enter the store number you are currently auditing.
- **Employee Number** – Enter your personal cynergi|suite employee number.
- **Password** – Enter your cynergi|suite employee password.



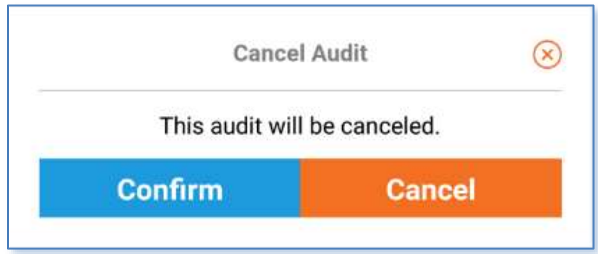
The ***Inventory Audit*** screen will give the user the ability to list Completed, Canceled, or Opened audits. Pressing on the corresponding tabs will provide a list of audits by their **Status**.

To begin a new Idle Inventory Audit, press **<u>Create New</u>**.



After creating a new audit, the audit will display with an ID number, a Status of "Created," the Employee name, and the Date on which the audit was created. If **Create New** is pressed again, a message on the screen will state, "Store [#] has an audit already in progress." Press the **OK** button to see the open audit.

Press the orange **X**  to cancel the audit. If canceling the audit, a window will be displayed.



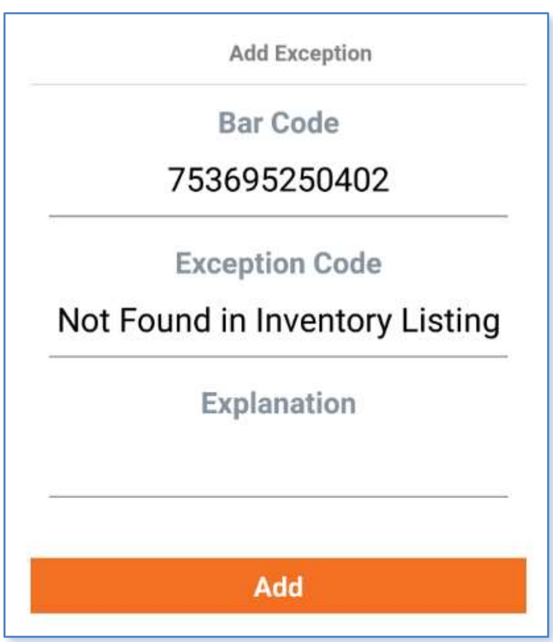
Press the blue **arrow**  to initiate a request to pull the idle inventory file from the cynergi|suite server to the device and start the audit. This will take the user to the ***Inventory Scan*** screen. Once the audit is opened, the user may push the back arrow in the top left corner to go back to the ***Inventory Audit*** screen, where the audit will now have a Status of "In Progress."

After starting the audit, the ***Inventory Scan*** screen will display, and the camera will be operable.

The upper section of this screen includes:

- **Audit #** – This is the audit number, or the ID from the ***Inventory Audit*** screen.
- **In Progress** – This is the audit's status.
- **Employee** – This is the employee who is currently logged in to the app.
- **Flash Icon** – This icon can turn on/off the device's flash to assist in scanning labels.
- **Location** – This drop-down menu will allow the user to choose where inventory is being scanned.
    - Showroom
    - Storeroom
    - Warehouse
- **Camera Icon** – This icon will close the camera and bring up a list of inventory items that are idle in the store. This list is searchable by **Bar Code** or by **Description**. To close this list and reopen the camera, press the **Camera** icon again.
  Please Note: Apple iOS devices have a horizontal white line on the camera display that shows where to scan the barcode.

Orange alert message:
Trouble scanning? Fill the view with the barcode and slowly pull away until it comes into focus. Make sure no other barcodes are viewable.



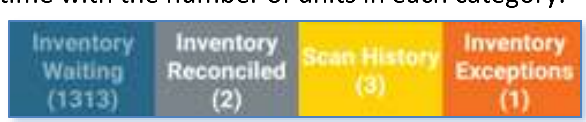
The lower section of the ***Inventory Scan*** screen includes four tabs:

- **Inventory Waiting** – Total number of idle inventory waiting to be scanned (1303).
- **Inventory Reconciled** – Total number of inventory items reconciled (12). Information shown is Bar Code, Location, Scanned by employee, and Model number.
- **Scan History** – Total number of inventory items scanned (13). Information shown is Time scanned, Bar Code, and Result (exception or reconciled). Exceptions are noted with a star and reconciled inventory with a checkmark .
  Please Note: If you are distracted by a customer or other store business, you can press the Scan History to see where you left off.
- **Inventory Exceptions** – Total number of exceptions (1). If an Exception is created, the ***Add Exception*** window will show the Bar Code and Exception Code for the item, and the user may input an **Explanation**.

List of possible Exception Codes:

BURGLARY - 'Unit Charged Off (Burglary)'
CHARGEOFF - 'Unit is Charged Off'
DEMO - 'Unit is a Loaner'
EARLYBUYOUT - 'Unit is an Early Buyout'
INSERVICE - 'Unit is in Service'
LOANER - 'Unit is a Demo'
EXCNOTFOUND - 'Not Found in Inventory Listing'
JUNKED - 'Unit is Junked'
NOTSCANNED - 'Unit Was Not Scanned'
PENDING - 'Pending Transfer'
RENTED - 'Unit is Currently on Rent'
RENTEDPAID - 'Unit is Paid Out on Rental'
RETURNED - 'Unit is Returned from Rental'
SKIPPED - 'Unit is Skipped'
SOLD - 'Unit was Sold'
STOLEN - 'Unit Charged Off (Stolen)'
UNKNOWN - 'Unknown' (Catchall)
WAREHOUSE - 'Unit in Warehouse'
WRONGLOCATION - 'Unit at Different Location ([*Store Number*])'

When scanning begins, the lower bar will update in real time with the number of units in each category.

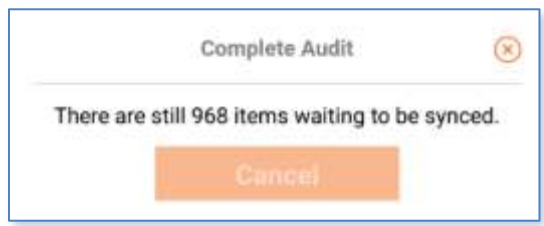


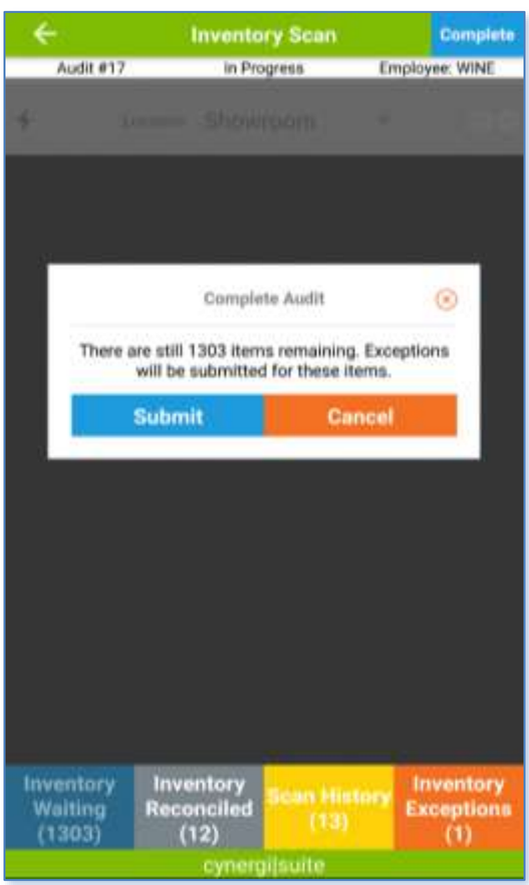
When ALL inventory has been scanned, complete the audit by pressing the blue **Complete** button in the top right corner.

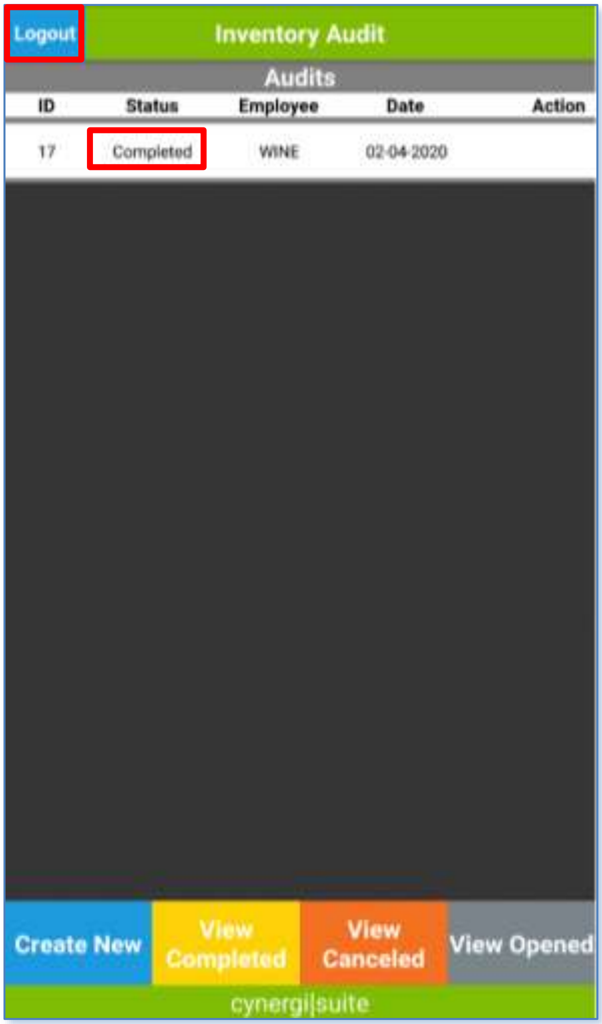
The ***Complete Audit*** window will display, stating, "There are still [#] items remaining. Exceptions will be submitted for these items."

Press **Cancel** to go back to the ***Inventory Scan*** screen and resume scanning if needed, or press **Submit** to end the scanning process. Exceptions will be created for any remaining idle inventory items before completing the audit.

When **Submit** is pressed, the sync process will start sending all audit activity back to the server.







When the sync process is complete, the audit status will be changed from "In Progress" to "Completed."

Press the blue **Logout** button to return to the login page.

Inventory Audit Dashboard

The **Inventory Audit Dashboard** is designed to go along with the Inventory Scanning App. It allows you to have a management view of the inventory audits as they are in progress. The current design is for each store to include all of their idle inventory in an audit.

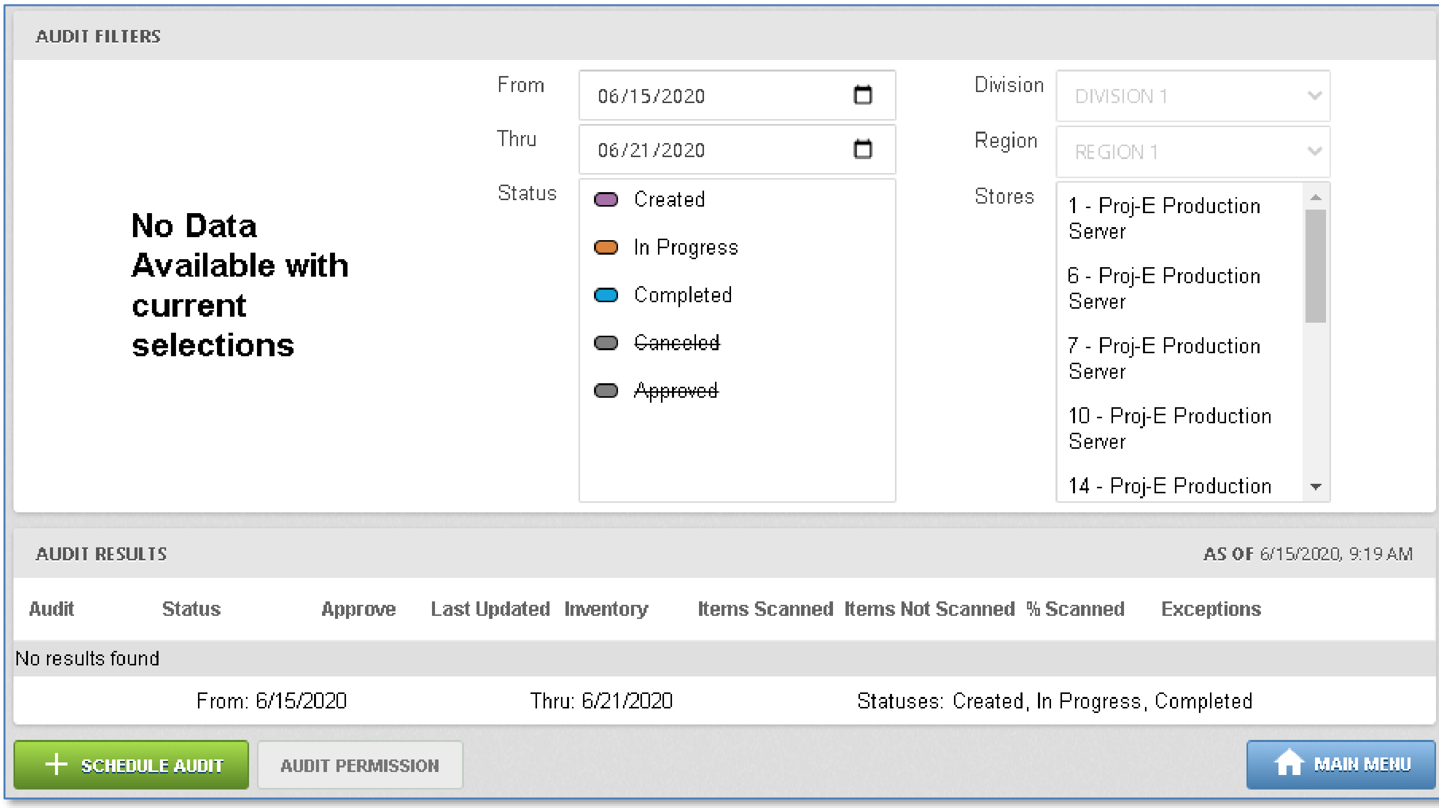
To access the **Inventory Audit Dashboard**, click on the **Inventory Audit** icon, located on the App Bar at the top of the cynergi|suite™ screen.

When entering this application, employees will only see the store(s) that they have access to in Employee Change (**EMPMNT**). If they have an "**N**" in the **Alt Stores** field on the second page of **EMPMNT**, they will only have access to their home store, shown on the first page. If they have an "**A**" in the **Alt Stores** field, they will have access to all stores. Furthermore, if "**D**" or "**R**" is selected in this field, then the employee will have access to any stores in the division or region indicated in the **Alt Div/Rg** field.

```
                           Employee Change                          06/18/20

   Name: Doe              , Jane              Acct#:     113

    Add: 321 45th St

   City: Anytown          TX 55555         License#:

Home Ph: (555)555-5555  Work Ph:                Cell Ph:
   SSAN: 000-00-0001
         Store:      1                   Emp Date:  4/25/19
 Marital Status:     M                 Spouse Name:
```

```
                           Employee Change                          06/18/20

   Name: Doe              , Jane              Acct#:     113

    Add: 321 45th St

   City: Anytown          TX 55555         License#:

Home Ph: (555)555-5555  Work Ph:                Cell Ph:
   SSAN: 000-00-0001
    Car Allowance:     N          Car Allow Amt:      0.00 Alt Stores: N
  Accts Receivable:    N          Accts Rec Amt:      0.00 Alt Div/Rg: 0000000
               IRA:    N                IRA Amt:      0.00 Alt Synonm: N
    Pay Frequency:     B          2nd Employee#:           Dflt Term Rec:     0
    Review Rating:                  Review Date:
 Overtime on 8 hrs:    N         Last Raise Date:
Work Past Midnight:    N          Last Raise Amt:     0.00
   Work Comp Code:              Termination Date:
Overtime Authority:    N       Overtime Passcode:
Overtime Break hrs:    40       Regular Passcode:
      Technician:     5         Account Manager:    N
      Birth Date:      1/01/1971       Supervisor:    N
        Enter "N"o or "A"ll, OR by "D"ivision or "R"egion location
Arrow Keys--Positioning, Return--Next Field, F8--Backout, Cmd--Exit Pgm
```

When entering the dashboard, the ***AUDIT FILTERS*** and ***AUDIT RESULTS*** screens will display, showing a dashboard of the current status of inventory audits across your enterprise (based on your security set to log into other stores) for the last week. To perform an audit, store employees must use an Apple or Android device to download the **Inventory Scanning App** from the Apple or Google Play store.



To begin, schedule an audit.

Scheduling an Audit

To schedule an inventory audit, click on the green **SCHEDULE AUDIT** button at the bottom of the page.

This will take you to the ***SCHEDULE AUDITS*** screen. Here, you can set up weekly or daily audits, depending on your store's operations. In the example below, an audit is set up for Mondays for all stores.

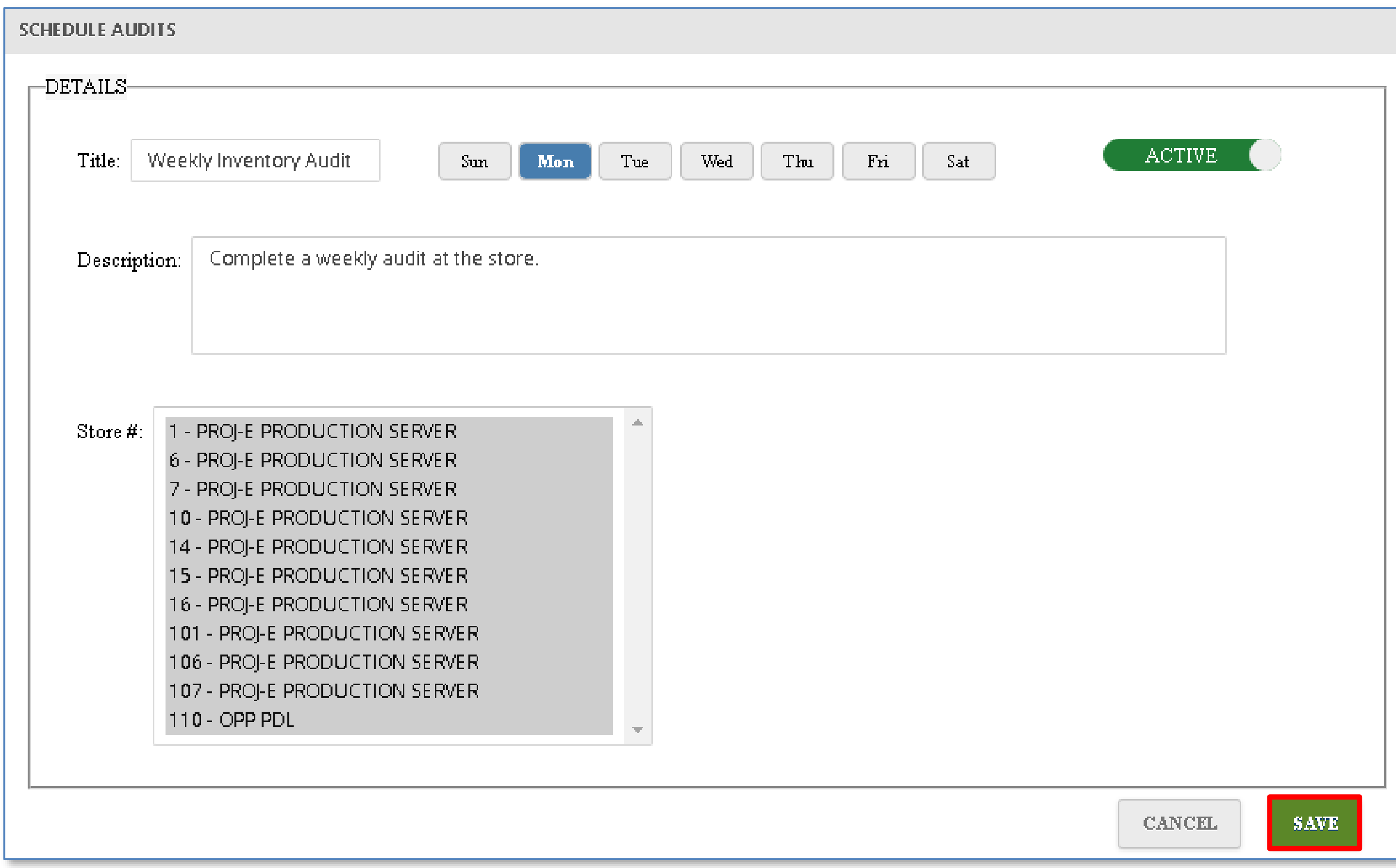
Enter a **Title** and **Description** for the audit.

Select the day of the week on which the weekly audit will be performed.

Choose the **Store #** for which the audit will be completed. To select a store, click on it so that the line is highlighted. To select multiple stores, click and drag across the list or hold down the **CTRL** key while clicking different stores.

To activate the audit, click the **ACTIVE/INACTIVE** toggle.

When finished, click the green **SAVE** button.

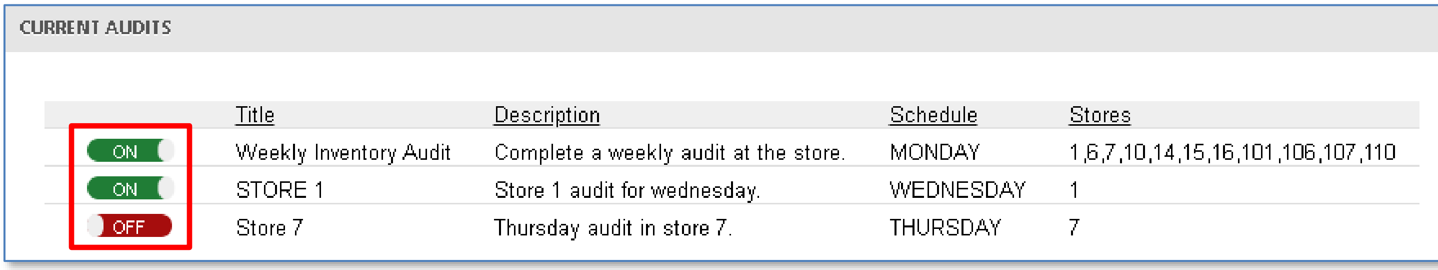


Though not required, scheduling an audit will do two things for the store:

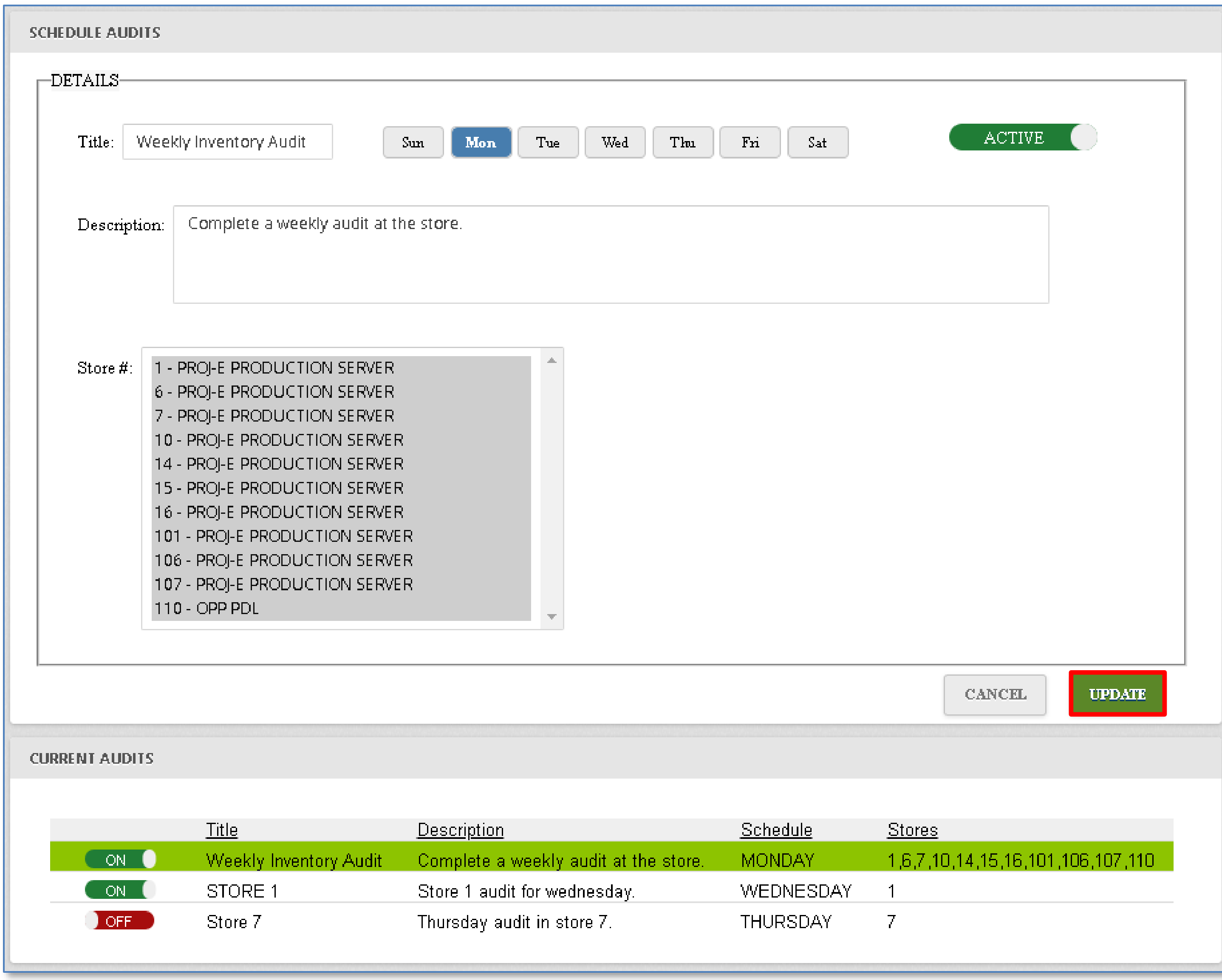
1) It will automatically create the new audit for each store on the scheduled date.
2) It will send a notification to each store employee when they log in until the audit is completed.

Editing a Scheduled Audit

Clicking the green __SCHEDULE AUDIT__ button also shows the ***CURRENT AUDITS*** screen. This screen, below the ***SCHEDULE AUDITS*** screen, shows all of the currently scheduled audits. To activate or deactivate an audit, click the __ON/OFF__ toggle.

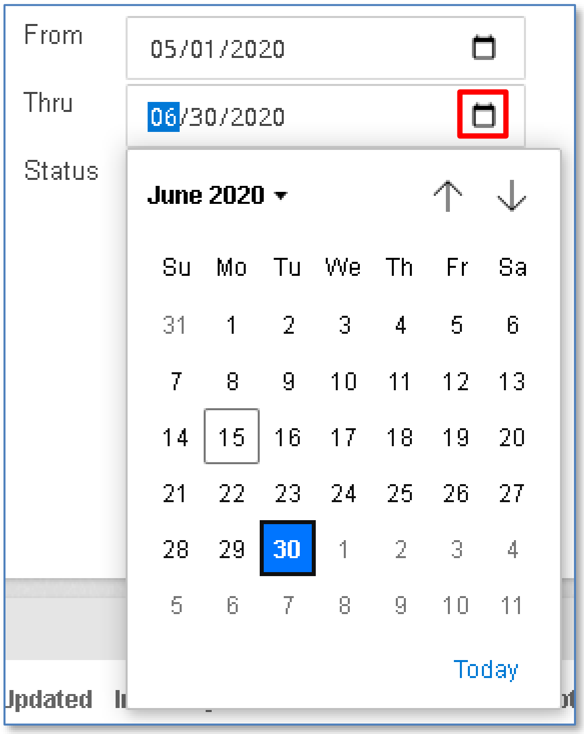


To edit an audit, click on its line, and the audit will appear in the ***SCHEDULE AUDITS*** screen above. The line will also be highlighted in green in the ***CURRENT AUDITS*** screen. When finished editing the audit, click the green __UPDATE__ button.

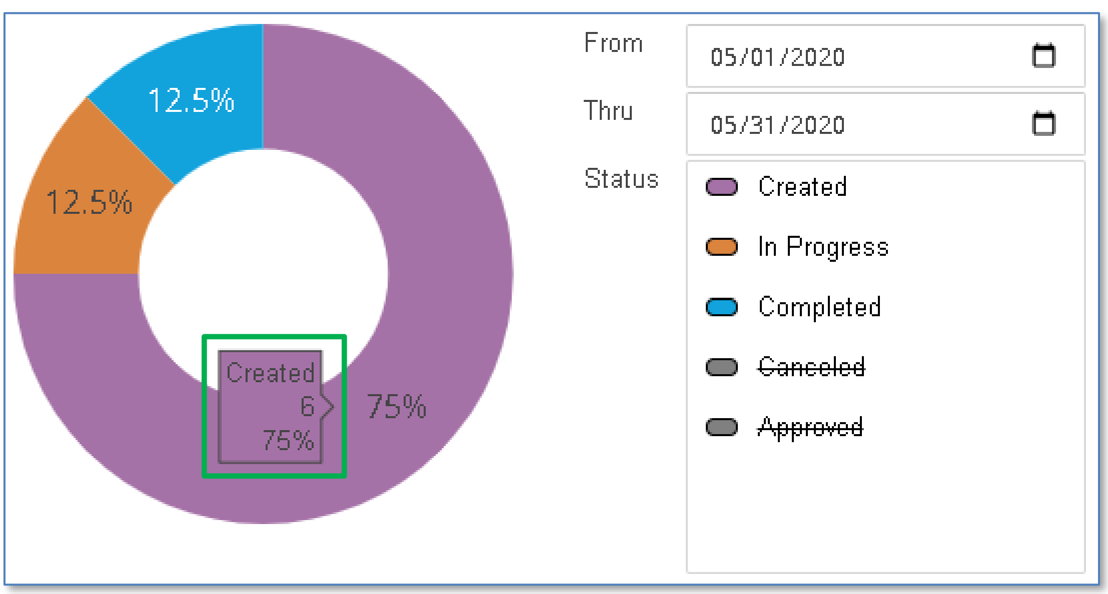


Inventory Audit Dashboard

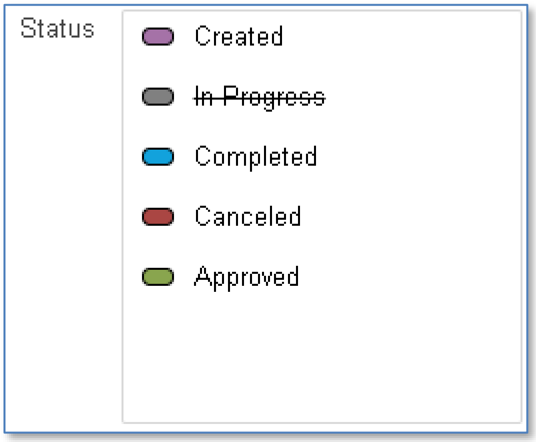
The ***AUDIT FILTERS*** and ***AUDIT RESULTS*** screens shows all of the audits and their statuses for the selected date range. To change the **From** and **Thru** dates, either type the desired date or click the calendar icon to pick a date from the drop-down calendar. From the calendar, you may click the month/year drop-down or use the up and down arrows to select a different month or year. You may select a date from the calendar or press **Today** for the current date (outlined with a gray box).



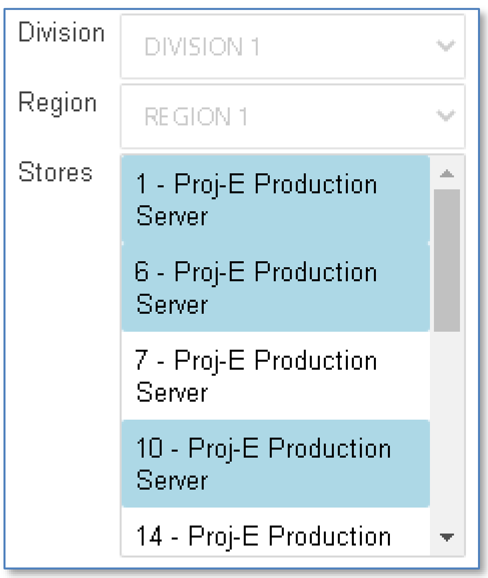
The pie chart shows the percentage of audits in each status. Hover over a section of the pie chart to see which status it represents, as well as how many audits have that status. In this example, there are six **Created** audits which make up 75% of the audits in the chart.



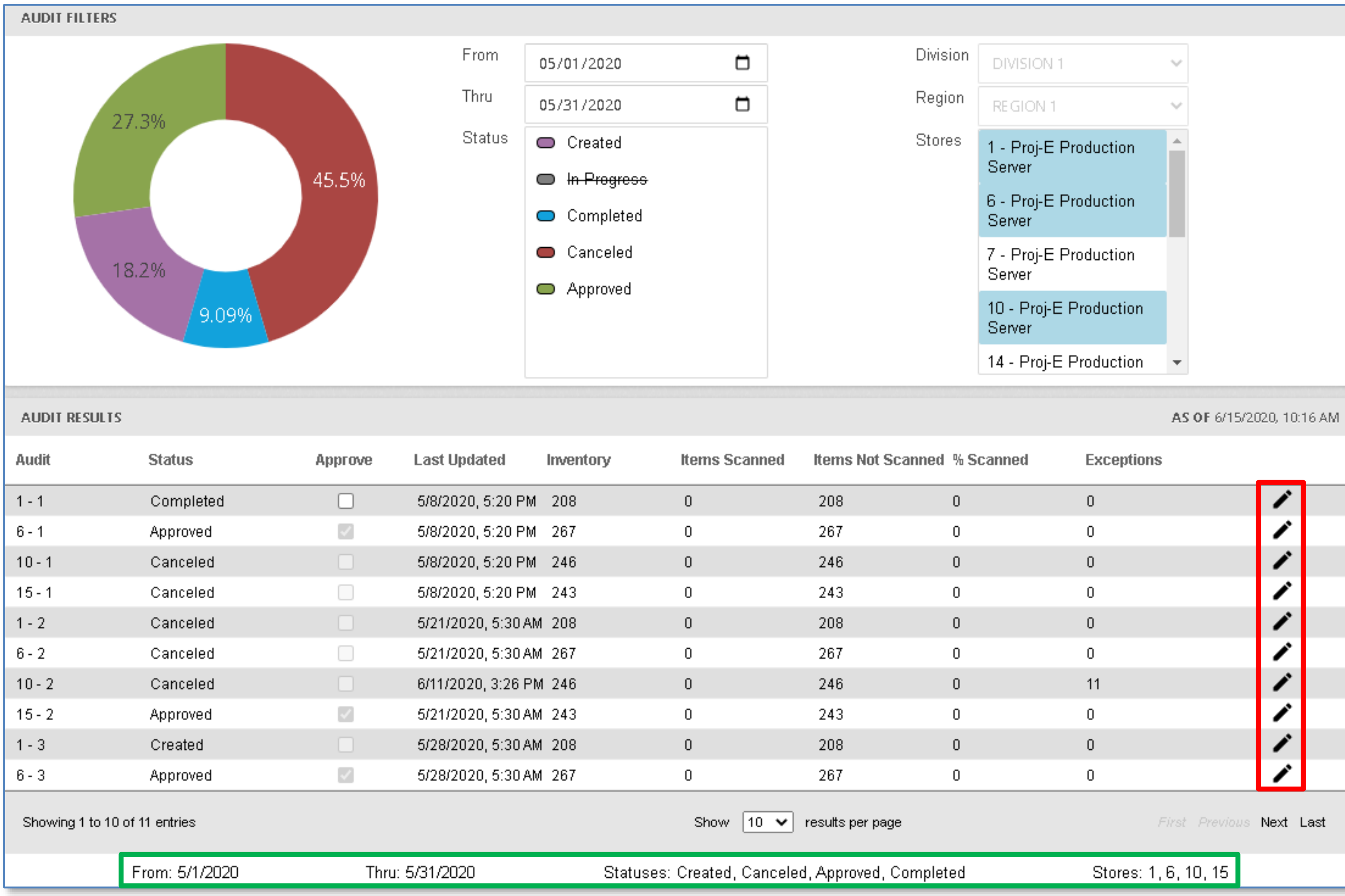
Underneath the **From** and **Thru** dates, the **Status** box shows which statuses are displayed in the pie chart and the table below. Click on a status to add it to or remove it from the pie chart and the table. Statuses that are not shown will be crossed out and grayed out in the **Status** box.



On the right side of the dashboard, the **Division** field allows you to select a division. If the division is not "**ALL**," you may select a region with the **Region** drop-down. In the **Stores** field, click each store that you want to view, and it will be highlighted in blue. To deselect a store, click it again. If no stores are selected, all stores will be displayed.



The ***AUDIT RESULTS*** screen contains a table showing information about every audit in the pie chart, such as the **Status** and the date and time when the audit was **Last Updated**. Click on the **Edit** (pencil) icon on the right to edit an audit. Below the table, you can see the **From** and **Thru** dates, **Statuses**, and **Stores** that were selected in the ***AUDIT FILTERS*** screen.



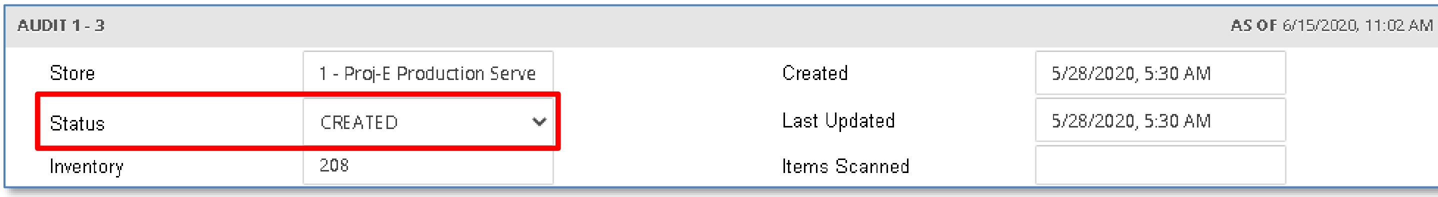
Audit	Status	Approve	Last Updated	Inventory	Items Scanned	Items Not Scanned	% Scanned	Exceptions
1 - 1	Completed		5/8/2020, 5:20 PM	208	0	208	0	0
6 - 1	Approved		5/8/2020, 5:20 PM	267	0	267	0	0
10 - 1	Canceled		5/8/2020, 5:20 PM	246	0	246	0	0
15 - 1	Canceled		5/8/2020, 5:20 PM	243	0	243	0	0
1 - 2	Canceled		5/21/2020, 5:30 AM	208	0	208	0	0
6 - 2	Canceled		5/21/2020, 5:30 AM	267	0	267	0	0
10 - 2	Canceled		6/11/2020, 3:26 PM	246	0	246	0	11
15 - 2	Approved		5/21/2020, 5:30 AM	243	0	243	0	0
1 - 3	Created		5/28/2020, 5:30 AM	208	0	208	0	0
6 - 3	Approved		5/28/2020, 5:30 AM	267	0	267	0	0

Showing 1 to 10 of 11 entries Show 10 results per page First Previous Next Last

From: 5/1/2020 Thru: 5/31/2020 Statuses: Created, Canceled, Approved, Completed Stores: 1, 6, 10, 15

Editing an Audit

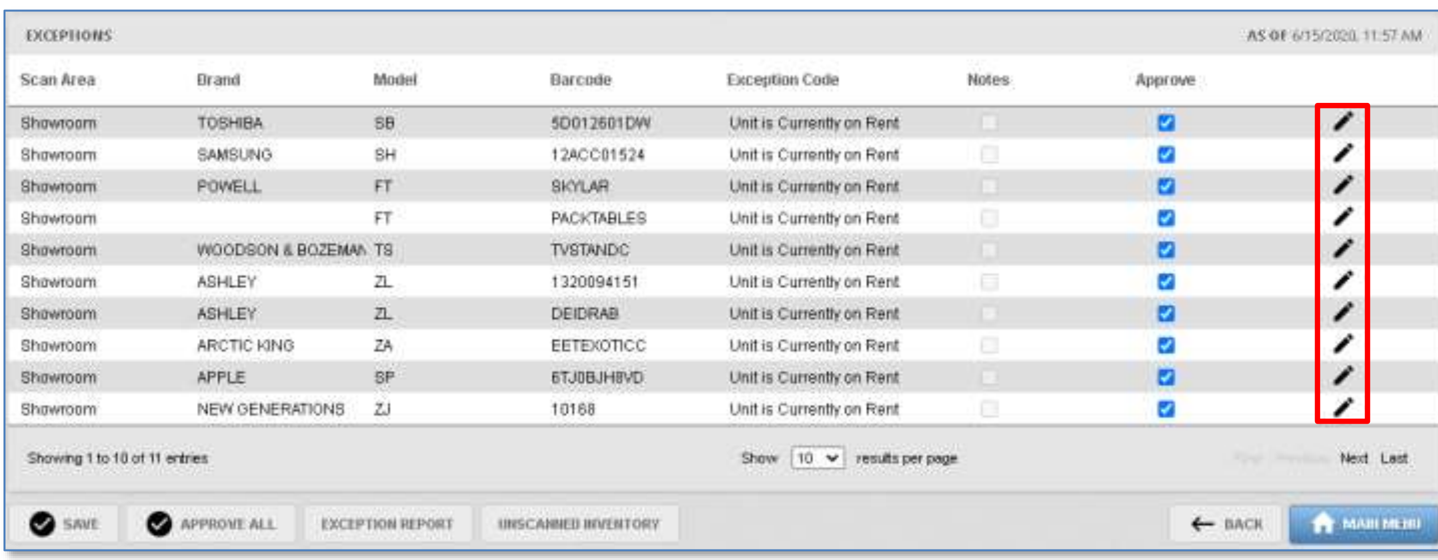
The ***AUDIT*** screen shows more details about the audit. There are two numbers following ***AUDIT***: the store number and a number showing which audit is currently displayed from that store. For example, the below audit is the third audit in store 1. Most fields here are read-only, but the **Status** may be updated for **CREATED**, **IN PROGRESS**, or **COMPLETED** audits.



The following table shows possible audit statuses and the statuses that they may be changed to.

Created	*In Progress, Canceled*
In Progress	*Completed, Canceled*
Completed	*Approved*
Canceled	*May not be changed*
Approved	*May not be changed*

The ***EXCEPTIONS*** screen shows any **Exceptions** that were scanned during the audit. The **Notes** column shows which exceptions, if any, have notes. The **Approve** column shows which exceptions, if any, have been approved. Click on the **<u>Edit</u>** (pencil) icon on the right to see more information about the exception and to view and add exception notes. *<u>Please Note</u>: Exception notes cannot be added for exceptions that have been approved.*

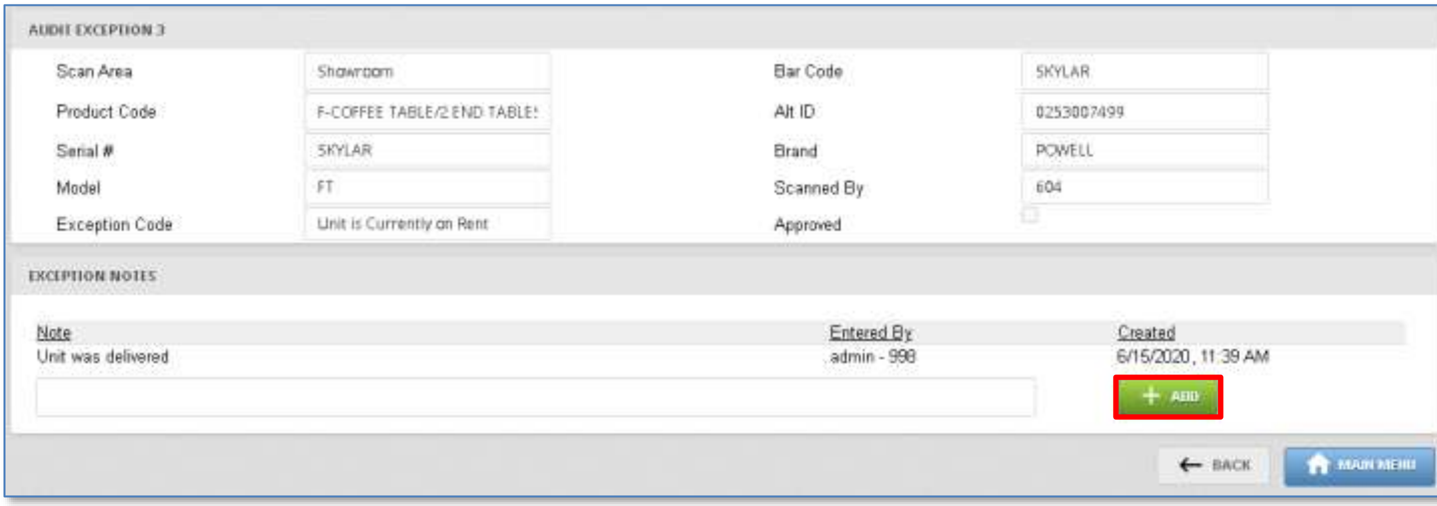

EXCEPTIONS — AS OF 6/15/2020, 11:57 AM

Scan Area	Brand	Model	Barcode	Exception Code	Notes	Approve
Showroom	TOSHIBA	SB	5D012601DW	Unit is Currently on Rent		✓
Showroom	SAMSUNG	SH	12ACC01524	Unit is Currently on Rent		✓
Showroom	POWELL	FT	SKYLAR	Unit is Currently on Rent		✓
Showroom		FT	PACKTABLES	Unit is Currently on Rent		✓
Showroom	WOODSON & BOZEMAN	TS	TVSTANDC	Unit is Currently on Rent		✓
Showroom	ASHLEY	ZL	1320094151	Unit is Currently on Rent		✓
Showroom	ASHLEY	ZL	DEIDRAB	Unit is Currently on Rent		✓
Showroom	ARCTIC KING	ZA	EETEXOTICC	Unit is Currently on Rent		✓
Showroom	APPLE	SP	6TJ0BJH8VD	Unit is Currently on Rent		✓
Showroom	NEW GENERATIONS	ZJ	10168	Unit is Currently on Rent		✓

Showing 1 to 10 of 11 entries — Show 10 results per page — Next Last

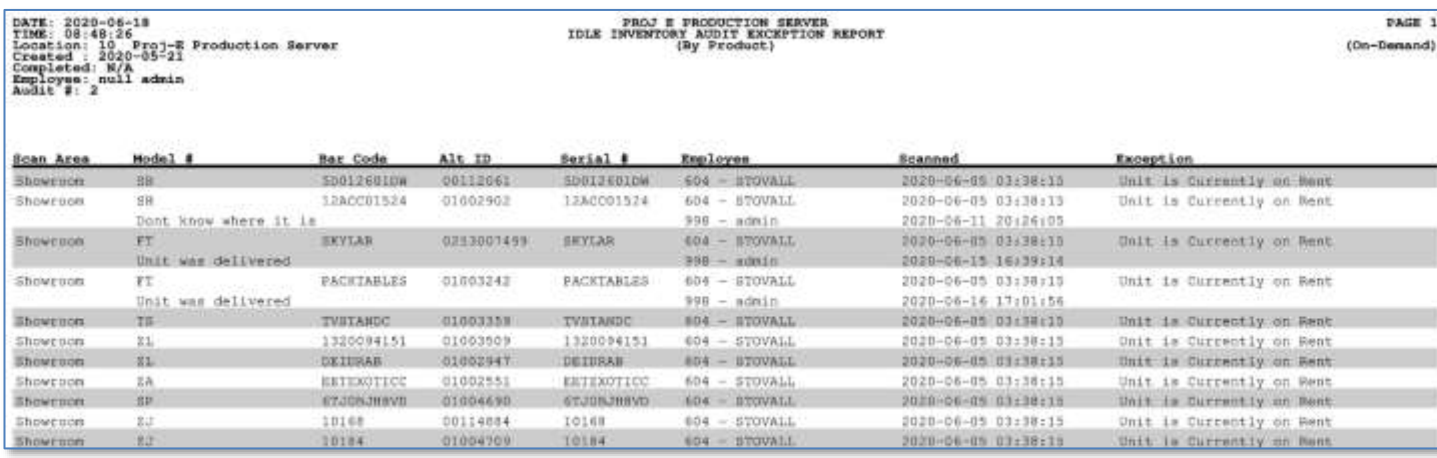
SAVE | APPROVE ALL | EXCEPTION REPORT | UNSCANNED INVENTORY | BACK | MAIN MENU

The ***AUDIT EXCEPTION*** screen shows more details about the item, such as the **Product Code**, **Serial #**, **Alt ID**, and the **Scanned By** employee. The ***EXCEPTION NOTES*** screen shows all notes for an exception, the employee who entered the note, and the date and time when the note was created. To add a note, type it in the box and click the green **ADD** button. When finished viewing and adding exception notes, click the **BACK** button to go back to the ***EXCEPTIONS*** screen.



From the ***EXCEPTIONS*** screen, check the boxes in the **Approve** column to approve certain exceptions, or click the **APPROVE ALL** button at the bottom to approve all exceptions.

Click the **EXCEPTION REPORT** button to view the **Idle Inventory Audit Exception Report**.



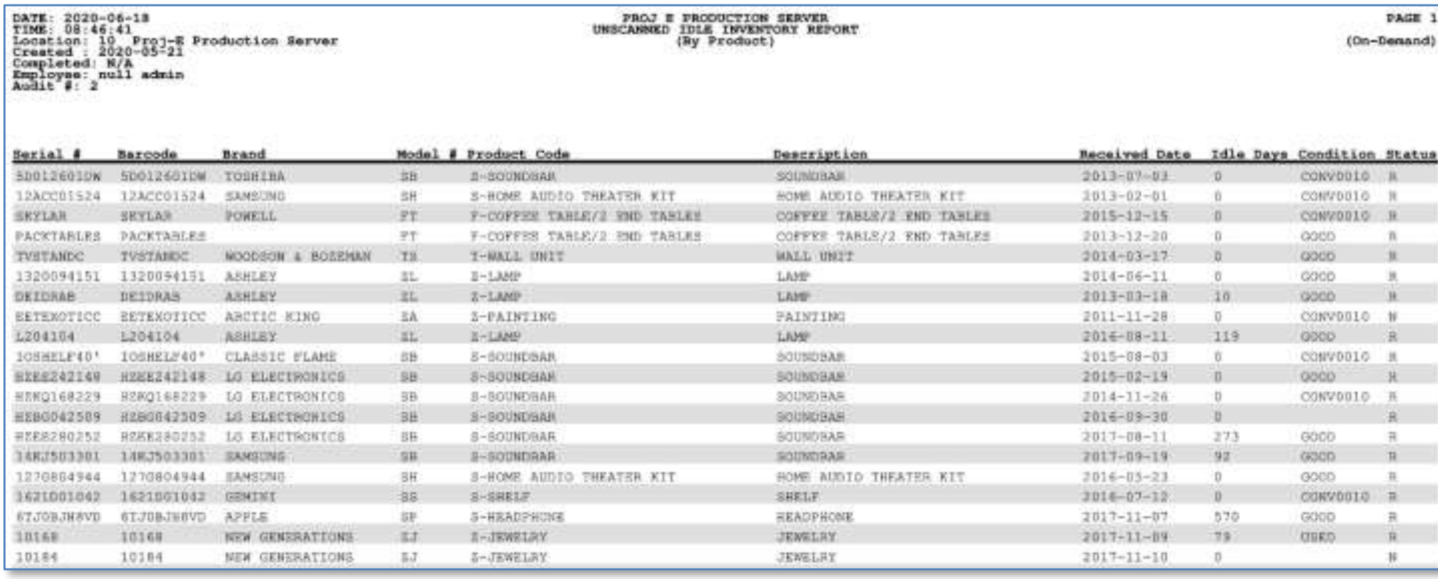
DATE: 2020-06-18
TIME: 08:48:26
Location: 10 Proj-E Production Server
Created : 2020-05-21
Completed: N/A
Employee: null admin
Audit #: 2

PROJ E PRODUCTION SERVER
IDLE INVENTORY AUDIT EXCEPTION REPORT
(By Product)

PAGE 1
(On-Demand)

Scan Area	Model #	Bar Code	Alt ID	Serial #	Employee	Scanned	Exception
Showroom	SB	SD0126010W	00112061	SD0126010W	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
Showroom	SB	12ACC01524	01002902	12ACC01524	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
	Dont know where it is				998 - admin	2020-06-11 20:26:05	
Showroom	FT	SKYLAR	0253007499	SKYLAR	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
	Unit was delivered				998 - admin	2020-06-15 16:39:14	
Showroom	FT	PACKTABLES	01003242	PACKTABLES	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
	Unit was delivered				998 - admin	2020-06-16 17:01:56	
Showroom	TS	TVSTANDC	01003358	TVSTANDC	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
Showroom	X1	1320094151	01003509	1320094151	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
Showroom	X1	DEIDRAB	01002947	DEIDRAB	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
Showroom	ZA	EETEXOTICC	01002551	EETEXOTICC	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
Showroom	SP	6TJDBJH8VD	01004690	6TJDBJH8VD	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
Showroom	ZJ	10168	00114884	10168	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent
Showroom	ZJ	10184	01004709	10184	604 - STOVALL	2020-06-05 03:38:15	Unit is Currently on Rent

Click the **UNSCANNED INVENTORY** button to view the **Unscanned Idle Inventory Report**.



DATE: 2020-06-18
TIME: 08:46:41
Location: 10 Proj-E Production Server
Created : 2020-05-21
Completed: N/A
Employee: null admin
Audit #: 2

PROJ E PRODUCTION SERVER
UNSCANNED IDLE INVENTORY REPORT
(By Product)

PAGE 1
(On-Demand)

Serial #	Barcode	Brand	Model #	Product Code	Description	Received Date	Idle Days	Condition	Status
5D0126010W	5D0126010W	TOSHIBA	SB	S-SOUNDBAR	SOUNDBAR	2013-07-03	0	CONVD010	R
12ACC01524	12ACC01524	SAMSUNG	SH	S-HOME AUDIO THEATER KIT	HOME AUDIO THEATER KIT	2013-02-01	0	CONVD010	R
SKYLAR	SKYLAR	POWELL	FT	F-COFFEE TABLE/2 END TABLES	COFFEE TABLE/2 END TABLES	2015-12-15	0	CONVD010	R
PACKTABLES	PACKTABLES		FT	F-COFFEE TABLE/2 END TABLES	COFFEE TABLE/2 END TABLES	2013-12-20	0	GOOD	R
TVSTANDC	TVSTANDC	WOODSON & BOZEMAN	TR	T-WALL UNIT	WALL UNIT	2014-03-17	0	GOOD	R
1320094151	1320094151	ASHLEY	ZL	Z-LAMP	LAMP	2014-06-11	0	GOOD	R
DEIDRAB	DEIDRAB	ASHLEY	ZL	Z-LAMP	LAMP	2013-03-18	10	GOOD	R
EETEXOTICC	EETEXOTICC	ARCTIC KING	ZA	Z-PAINTING	PAINTING	2011-11-28	0	CONVD010	N
L204104	L204104	ASHLEY	ZL	Z-LAMP	LAMP	2016-08-11	119	GOOD	R
10SHELF40'	10SHELF40'	CLASSIC FLAME	SB	S-SOUNDBAR	SOUNDBAR	2015-08-03	0	CONVD010	R
HZEE242148	HZEE242148	LG ELECTRONICS	SB	S-SOUNDBAR	SOUNDBAR	2015-02-19	0	GOOD	R
HZKQ168229	HZKQ168229	LG ELECTRONICS	SB	S-SOUNDBAR	SOUNDBAR	2014-11-26	0	CONVD010	R
HZBG042509	HZBG042509	LG ELECTRONICS	SB	S-SOUNDBAR	SOUNDBAR	2016-09-30	0		R
HZEK280252	HZEK280252	LG ELECTRONICS	SB	S-SOUNDBAR	SOUNDBAR	2017-08-11	273	GOOD	R
14KJ503301	14KJ503301	SAMSUNG	SB	S-SOUNDBAR	SOUNDBAR	2017-09-19	92	GOOD	R
1270804944	1270804944	SAMSUNG	SH	S-HOME AUDIO THEATER KIT	HOME AUDIO THEATER KIT	2016-05-23	0	GOOD	R
1621001042	1621001042	GEMINI	SS	S-SHELF	SHELF	2016-07-12	0	CONVD010	R
6TJOBJH8VD	6TJOBJH8VD	APPLE	SP	S-HEADPHONE	HEADPHONE	2017-11-07	570	GOOD	R
10168	10168	NEW GENERATIONS	ZJ	Z-JEWELRY	JEWELRY	2017-11-09	79	USED	R
10184	10184	NEW GENERATIONS	ZJ	Z-JEWELRY	JEWELRY	2017-11-10	0		N

When finished, click **SAVE** and then **BACK** to go back to the dashboard.

Change Audit Permissions

From the dashboard, you may also change audit permissions by clicking the **AUDIT PERMISSION** button at the bottom of the page.

Here, you may select which departments have permission to **Approve Audits** or **Change Audit Permissions**. The **Current Settings** are displayed in the middle section. Select either of the **Edit Departments Allowed** drop-downs to change the settings. To select multiple departments, click and drag across the list or hold down the **CTRL** key while clicking different departments. When finished, click **SAVE** and then **BACK** to go back to the dashboard.