

TOSCOGA Software

How do I...

Enter a Dealer Rental Contract

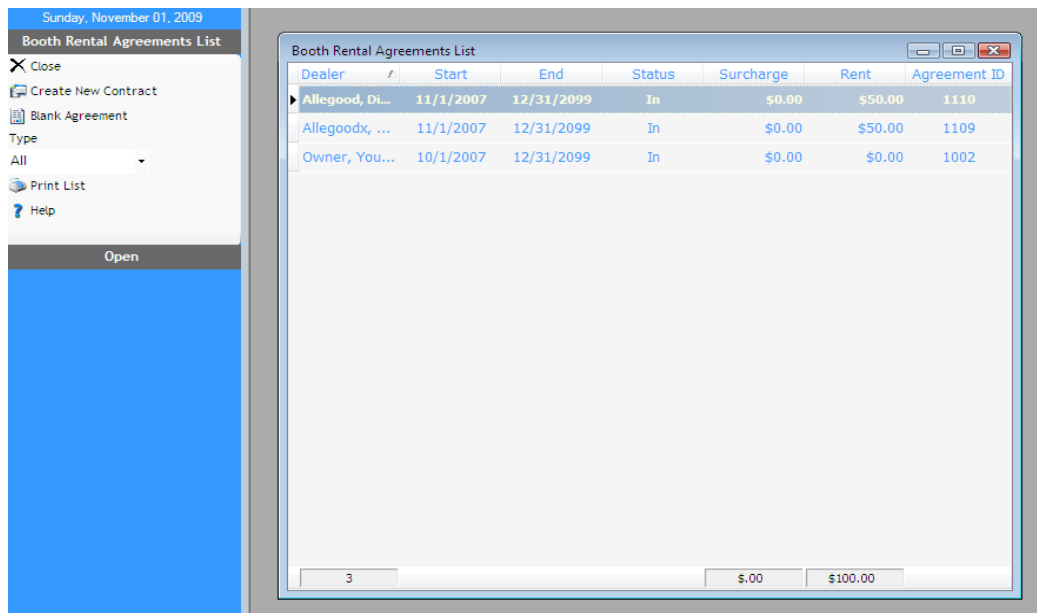
How do I...

Enter a Dealer Rental Contract

Prior to entering a rental or consignment contract the dealers name and code must be entered into the Contacts list. Please follow the instructions for entering contacts before proceeding.

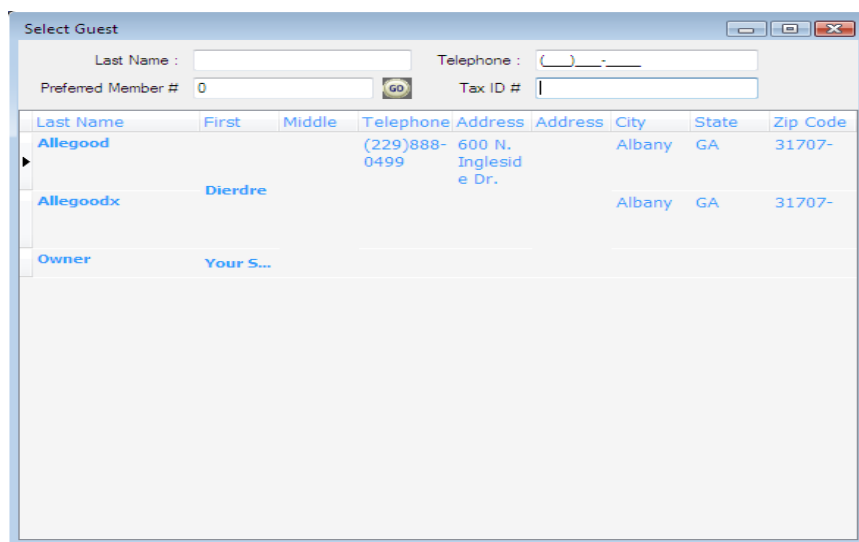
From the Main Menu select 'Agreements' > 'Booth Rental Agreements'.

The system will display a list of active agreements.

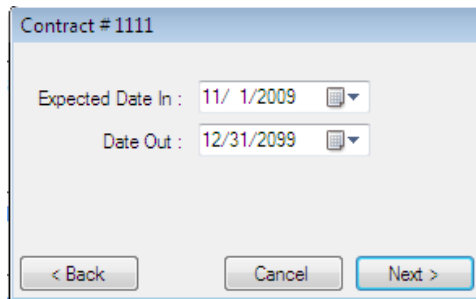


Select 'Create New Contract' from the option panel.

The system will begin the step-by-step process by displaying the list of dealers from which you should select the desired dealer.



The system will prompt you for the move-in date and the move-out date. Since you probably don't know the move-out date then leave the date as 12/31/2099.



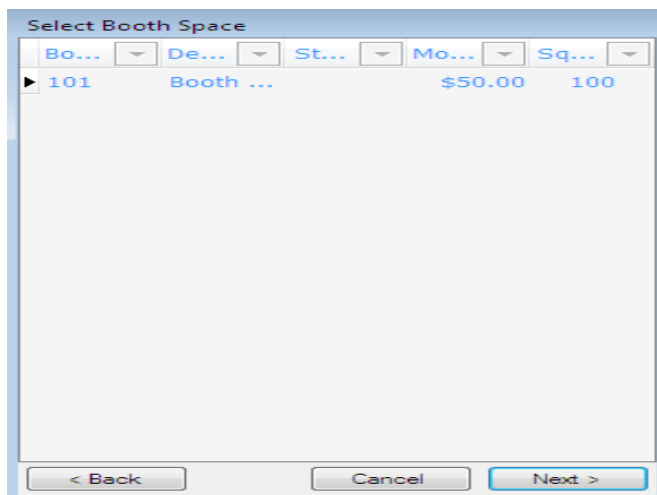
Contract # 1111

Expected Date In : 11/ 1/2009

Date Out : 12/31/2099

< Back Cancel Next >

The system will then display a list of booth spaces that you have defined in the settings portion of the system.



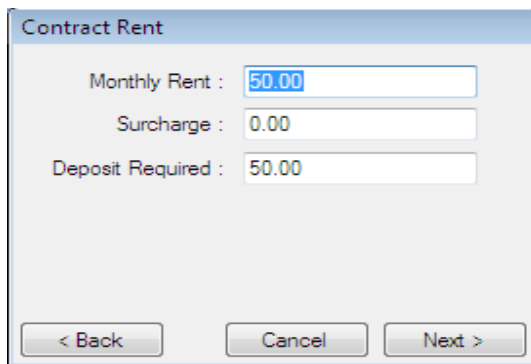
Select Booth Space

Bo...	De...	St...	Mo...	Sq...
▶ 101	Booth ...		\$50.00	100

< Back Cancel Next >

Select the desired booth by double-clicking on it and then press 'Next'.

The system will then prompt you to enter the monthly rental fee and the necessary deposit amount, if any. The monthly rent will automatically be entered from the standard you entered on the booth record when entering all of your booth information. The system allows you to add surcharges if you like.



Contract Rent

Monthly Rent : 50.00

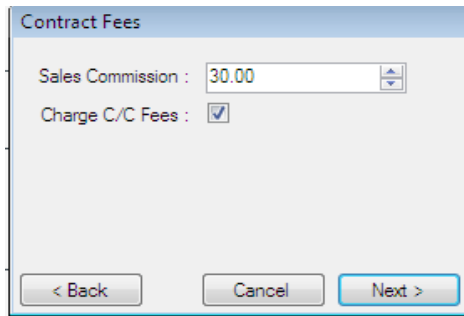
Surcharge : 0.00

Deposit Required : 50.00

< Back Cancel Next >

Enter the appropriate amounts and press 'Next'.

The system will then prompt you to confirm the commission rates for this customer.



Contract Fees

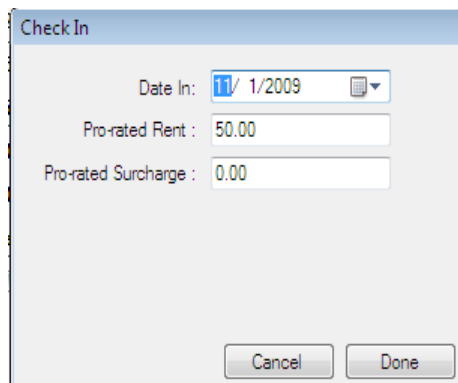
Sales Commission : 30.00

Charge C/C Fees :

< Back Cancel Next >

The system also can deduct a percentage from the dealer checks if the sale payment was made by a credit card. You enter that percentage in the settings portion of the system. Confirm that this dealer should have that percentage deducted by checking the 'Charge C/C Fees' box.

The system will then ask if you want to check this dealer into their space now.



Check In

Date In: 11/ 1/2009

Pro-rated Rent : 50.00

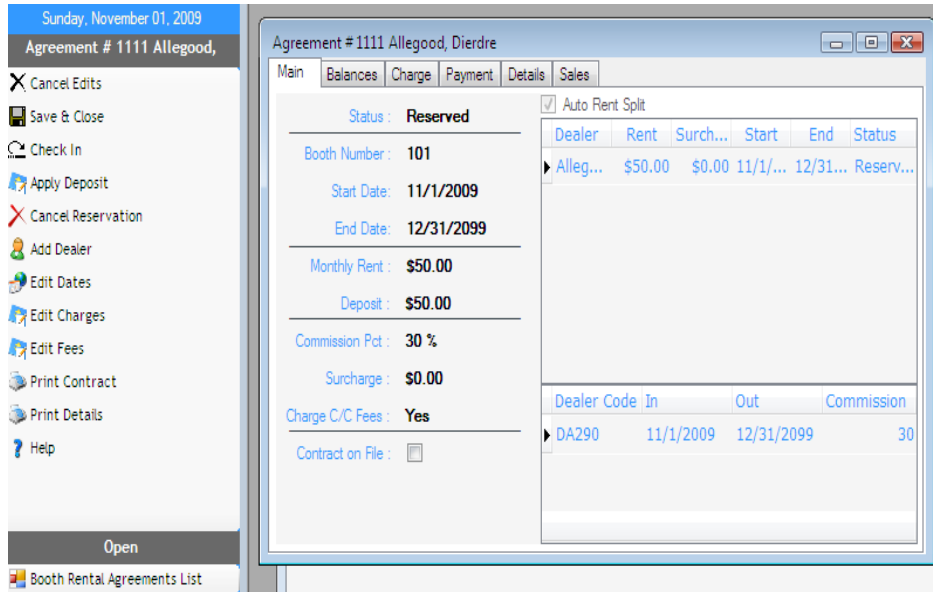
Pro-rated Surcharge : 0.00

Cancel Done

If you want to check this dealer into their space enter then enter the date they checked in and any amount of pro-rated rent and surcharges. The system will calculate those amounts based on the date you enter.

If the dealer will move into their space at a later time press cancel.

The system will then display the contract re-cap screen. The following example is that of a booth rental agreement that is not checked-in. This is the recap screen that is displayed when you select an existing agreement from the agreements listing.



This is a quick description of each of the options.

Cancel Edits - Cancel any changes you have made to the contract and exits.

Save & Close - Writes any changes you have made to the contract and exits.

Check In - Displays the check in screen as previously described. Complete this form when the dealer actually moves into his/her space.

Apply Deposit - Apply the amount of the deposit to the dealer account. This actually creates a sales ticket and charges the dealer account.

Cancel Reservation - Use this option to cancel the rental reservation.

Add Dealer - Often booths are rented by more than one dealer. You may enter any number of dealers to the rental contract. Again, the dealer information must first be entered through the Contact Information section. The system will display the list of dealers from which you may select the desired dealer.

Edit Dates - Before the rental reservation is checked in you may edit the move-in date. Once the reservation has been checked in you may only edit the move-out date.

Edit Charges - You may edit the rental, surcharge amounts and the amount of the required deposit.

Edit Fees - You may edit the commission and credit card fee amounts.

Print Contract - Under settings you may enter the complete text of your rental agreements. This option will print that text and fill in all the details of the rental contract that the dealer can sign.

Print Details - This will print a statement of charges and payments made during the term of this contract.

Once the rental agreement has been checked in the following recap screen is displayed when the contract is accessed.



The Check Out option is now available. Use that option when the dealer moves out to close out the contract.

Notice on the right side of the screen the 'Auto Rent Split'. When you have multiple dealers you can split the rental amount among the associated dealers and track the charges and payments individually. Alternatively, you can un-check the 'Auto Rent Split' and enter the exact amount to charge each dealer each month. You may also change the surcharge amount, the start and end dates and the status of any of the associated dealers.

Right clicking on the dealer listing displays the following options:

Print Contract - You may print individual contracts for each of the associated dealers.

Create Dealer Codes - This option searches the records for the selected dealer and creates a link for each of the associated dealer codes to this contract. Dealers are allowed to have multiple dealer codes that may be associated with different contracts and one may have been omitted from this contract. This option re-associates those codes with this contract.

View Dealer - This option will display the dealer contact information for the selected dealer.

In the bottom corner a list of dealer codes associated with this contract for the selected dealer. You may remove unwanted dealer codes by right clicking and selecting 'Remove Dealer Code'.

The Balances Tab display the current balance of charges and payments.

Agreement # 1111 Allegood, Dierdre Hartin, Suzanne

Main Balances Charge Payment Details Sales

Account History

	Current	Last Month	To Date
Deposits	0.00	0.00	0.00
Rent Charges	50.00	0.00	50.00
Surcharges	0.00	0.00	0.00
Other Charges	0.00	0.00	0.00
Payments	0.00	0.00	0.00
Balance	50.00	0.00	50.00

The Charges Tab is where you apply any additional, one-time charges such as late fees to the dealer agreement.

Agreement # 1111 Allegood, Dierdre Hartin, Suzanne

Main Balances Charge Payment Details Sales

Charge

Charge to : Allegood, Dierdre

Date : 11/ 1/2009

Charge Type :

Memo :

Amount to Charge : 0.00

Apply Charge

The Payment Tab is one way to apply a dealer payment. If the contract has multiple dealers you can select the appropriate dealer for whom you wish to apply a payment. Then select the type of payment; Cash, credit card, etc.

Agreement # 1111 Allegood, Dierdre Hartin, Suzanne

Main Balances Charge Payment Details Sales

Payment

Paid by : Allegood, Dierdre

Date : 11/ 1/2009

Payment Type : Cash Payment (On Account)

Memo :

Amount Paid : 50.00

Accept Payment

The Details Tab shows each charge and payment applied during the term of the contract. Right click on a line entry to display a list of options from which you can edit that entry.

Agreement # 1111 Allegood, Dierdre Hartin, Suzanne

Main Balances Charge Payment Details Sales

Dealer	Description	Date	Number	Total	Balance
Allegood, Dierd...	Booth Deposit	11/1/2009	1822	\$0.00	\$0.00
Allegood, Dierd...	Prorated Booth ...	11/1/2009	1823	\$50.00	\$50.00
				\$50.00	\$50.00

The Sales Tab displays each of the items sold during the term of the contract.