



Draw More Customers with Rentals



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WHAT YOU'LL LEARN

- About Point of Rental Essentials
- Point of Rental Essentials Integration
- How it works
 - Sign up with Point of Rental Essentials
 - Set up the integration
 - Process a payment
 - View rental customers in Paladin
 - Collect a deposit
 - Process a refund
 - More ways to recall a payment
 - Requirements and cost
 - Learn more

About Point of Rental Essentials



- Point of Rental is a longtime leader in rental software.
- Point of Rental Essentials is a cloud-based solution that lets you easily track and maintain your rental inventory while providing a great customer rental experience.

Point of Rental Essentials Integration



- Paladin provides rental payment processing and tax calculations for Point of Rental Essentials.
- It's seamless:
 - Scan the contract in Paladin and collect payment.
 - Point of Rental Essentials is updated automatically.
- And your accounting is all in one place:
 - Rental payments and tax totals are maintained in Paladin.

SIGN UP WITH
POINT OF RENTAL ESSENTIALS

Sign up and set up Point of Rental Essentials



- Contact Paladin Support and explain your interest in the Point of Rental Essentials integration.
- If you are new to Point of Rental Essentials, Paladin will connect you with Point of Rental to get more information and to sign up.
- Set up Point of Rental Essentials for your rental department.

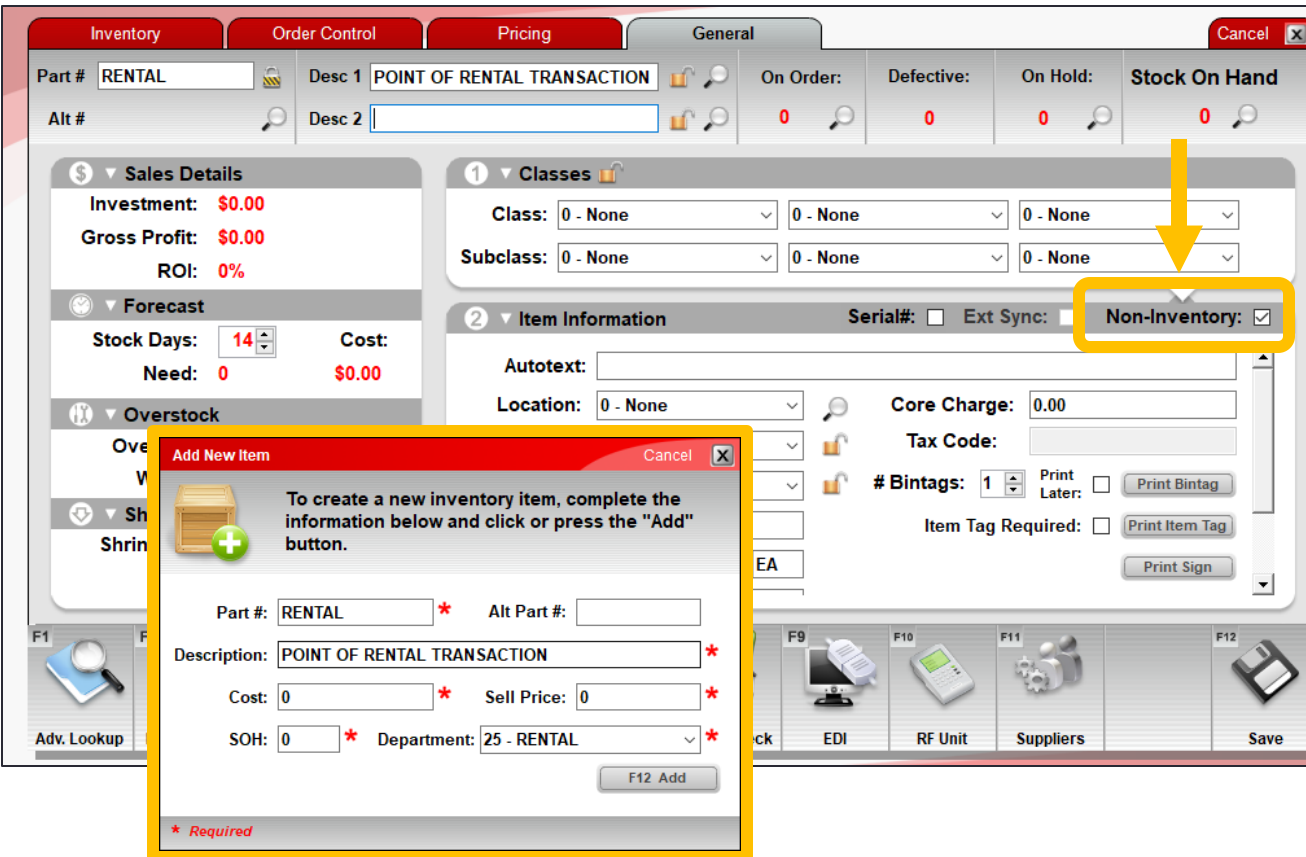
SET UP THE PALADIN INTEGRATION

Set up the integration with Paladin Support

During the integration setup process, Paladin Support will create:

- A non-inventory item to track rental payments
- A rental department
- A rental tax rate, if applicable*

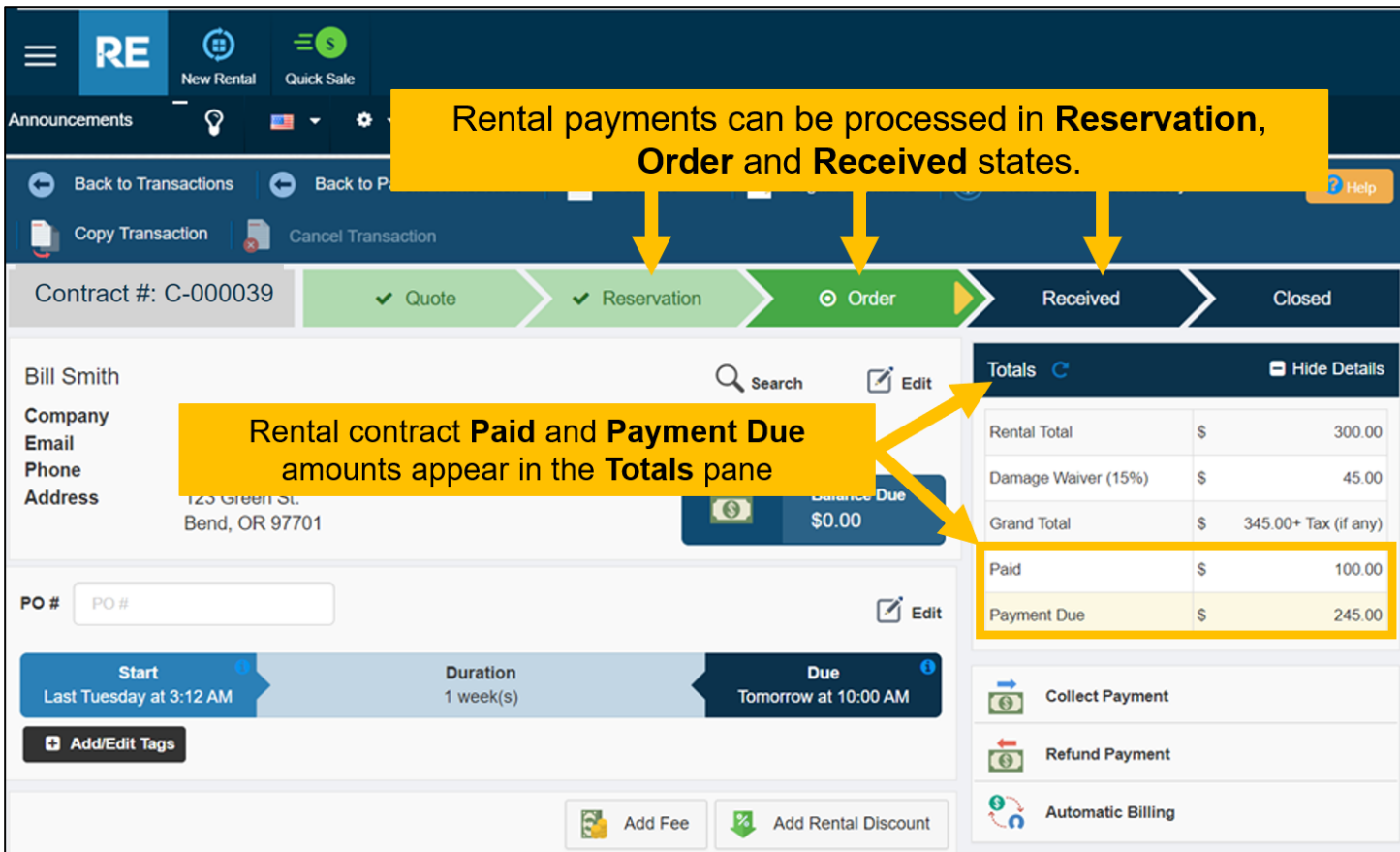
*An unused Paladin tax category is required. Or you can use Avalara AvaTax.



The screenshot displays the University software interface with the 'Inventory' tab selected. The 'Part #' field is set to 'RENTAL' and the 'Desc 1' field is 'POINT OF RENTAL TRANSACTION'. The 'Stock On Hand' field is 0. The 'Non-Inventory' checkbox is checked, highlighted by a yellow box and an arrow. The 'Add New Item' dialog box is open, showing the 'Part #' field as 'RENTAL', 'Description' as 'POINT OF RENTAL TRANSACTION', 'Cost' as 0, 'Sell Price' as 0, 'SOH' as 0, and 'Department' as '25 - RENTAL'. The 'Add' button is labeled 'F12 Add'.

PROCESS A PAYMENT

When to process a rental payment



Rental payments can be processed in **Reservation**, **Order** and **Received** states.

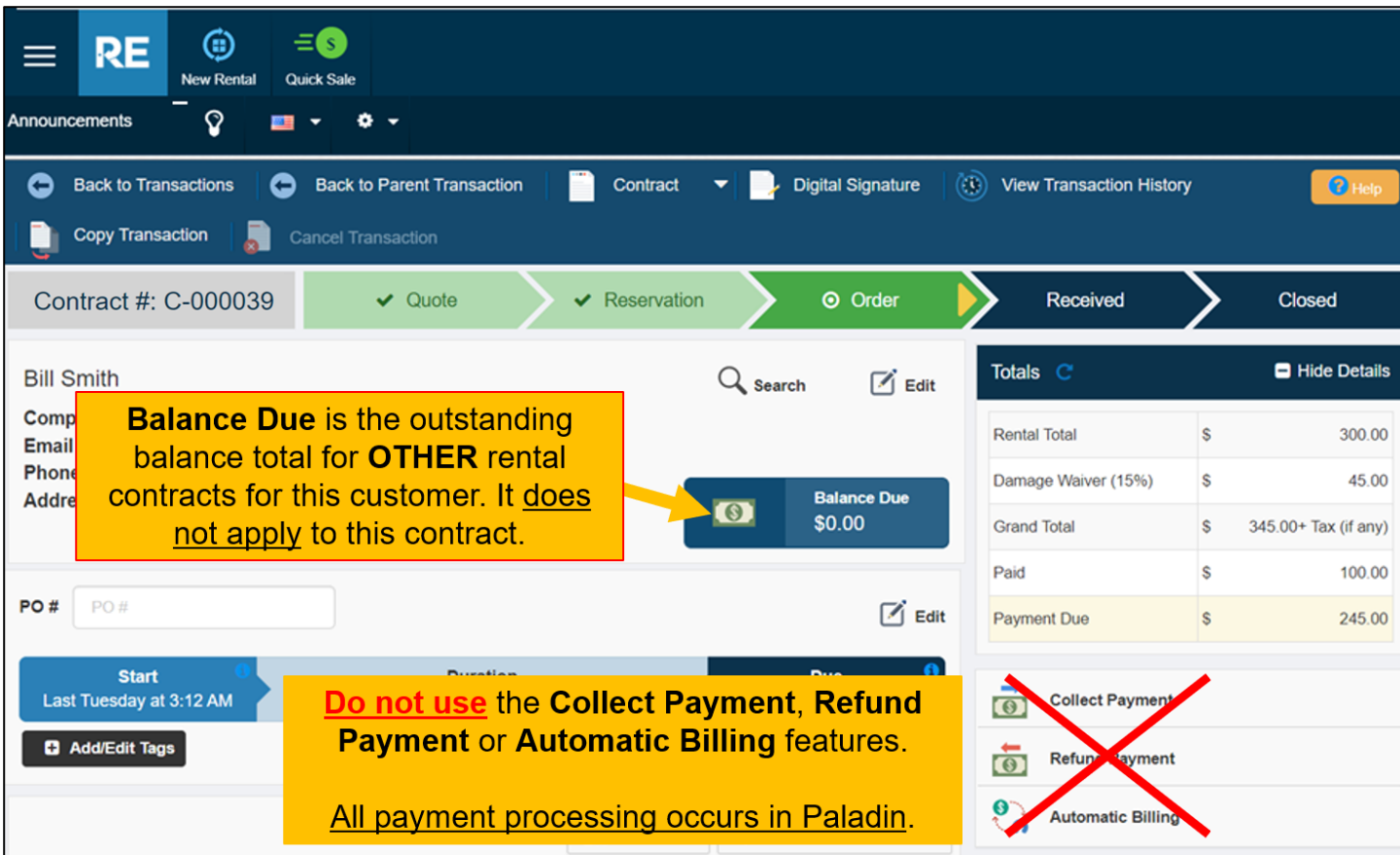
Rental contract **Paid** and **Payment Due** amounts appear in the **Totals** pane

Totals	
Rental Total	\$ 300.00
Damage Waiver (15%)	\$ 45.00
Grand Total	\$ 345.00+ Tax (if any)
Paid	\$ 100.00
Payment Due	\$ 245.00

You can process a rental payment (or refund) in Paladin when the rental contract is in one of these states in Point of Rental Essentials:

- **Reservation**
- **Order**
- **Received**

All payment processing occurs in Paladin



Balance Due is the outstanding balance total for **OTHER** rental contracts for this customer. It does not apply to this contract.


Do not use the **Collect Payment**, **Refund Payment** or **Automatic Billing** features.

All payment processing occurs in Paladin.

Totals	
Rental Total	\$ 300.00
Damage Waiver (15%)	\$ 45.00
Grand Total	\$ 345.00+ Tax (if any)
Paid	\$ 100.00
Payment Due	\$ 245.00

- Payment processing occurs solely in Paladin.
- Do not use the payment features in Point of Rental Essentials.

How to recall the rental payment in Paladin

Contract # C-000039


BILL SMITH
SMITH INC.
 123 GREEN ST.
 BEND, OR 97701
 +1 123 456 7890
 BILL@SMITH.COM

Rental Agent:	CONTRACT DATES:	STATUS:
Chris Kelley	Thu 12/03/2020 05:47 PM through Thu 12/10/2020 05:47 PM	Received

- In the **Invoice/Quote** module, scan the rental contract barcode to add the rental **Payment Due** to an invoice.
- Optional: Add additional sale items.
- Do not add additional rental contracts. Process only one rental contract payment per invoice.

Invoice / Quote
Checkout
Cancel ✕

Rewards
 Credit

Customer

Address 2

Phone

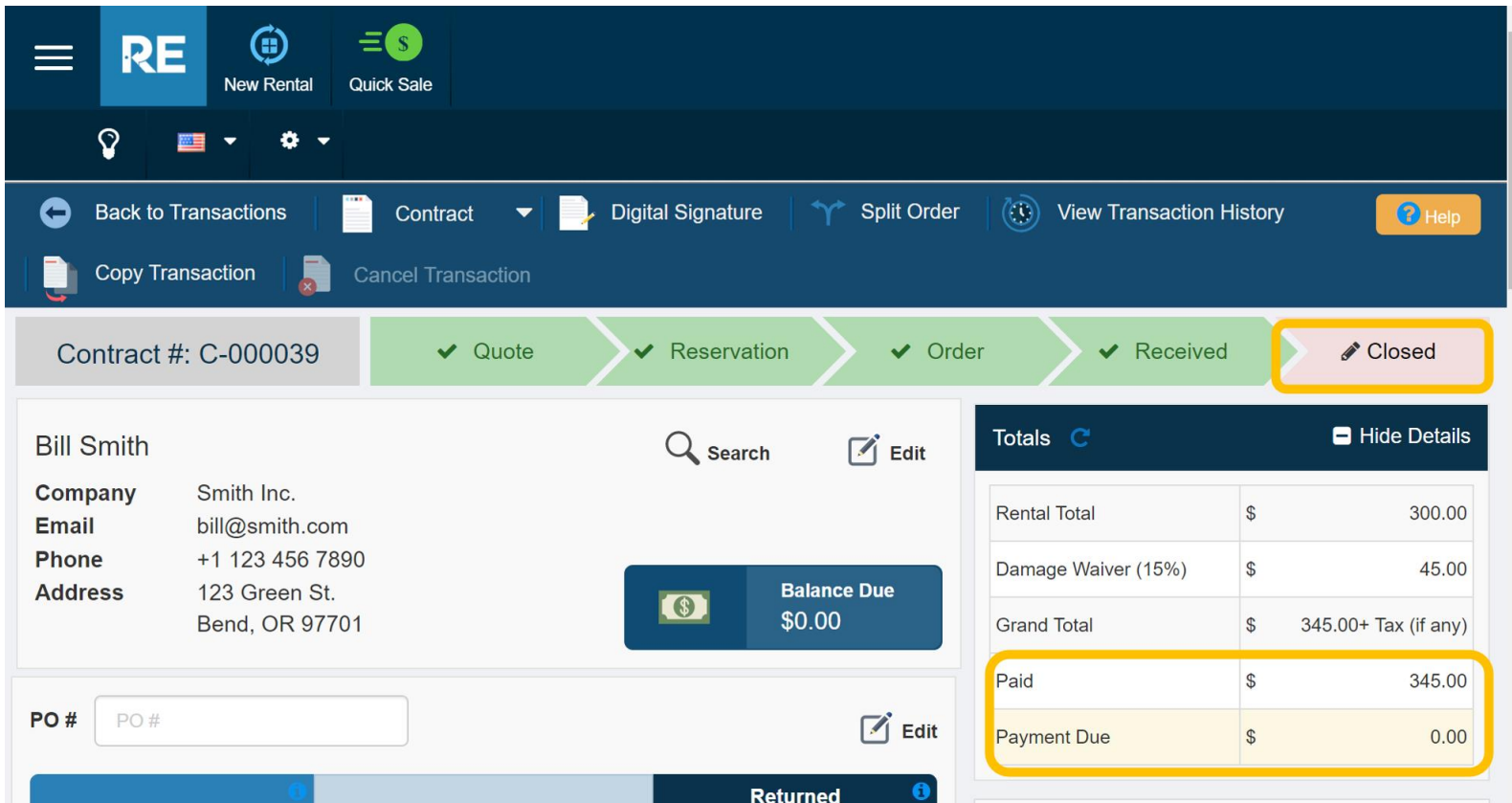
Address 1

City/State/Zip

Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RENTAL 1	POINT OF RENTAL TRANSACTION EACH	1	\$ 245.00	\$ 245.00
0	0	0		245.00			
Contract #: C-000039				NOTES			

What happens when the payment completes



The screenshot displays the Point of Rental Essentials interface for a contract with ID C-000039. The top navigation bar includes a menu icon, the 'RE' logo, and buttons for 'New Rental' and 'Quick Sale'. Below this is a toolbar with icons for a lightbulb, a flag, and a gear. The main toolbar contains buttons for 'Back to Transactions', 'Contract' (with a dropdown), 'Digital Signature', 'Split Order', 'View Transaction History', 'Copy Transaction', and 'Cancel Transaction'. A progress bar shows the contract's status: 'Quote' (checked), 'Reservation' (checked), 'Order' (checked), 'Received' (checked), and 'Closed' (highlighted with a yellow box). The contract details for 'Bill Smith' are listed, including company, email, phone, and address. A 'Balance Due' box shows '\$0.00'. A 'Totals' table is also present, with the 'Paid' row highlighted in yellow.

Totals	
Rental Total	\$ 300.00
Damage Waiver (15%)	\$ 45.00
Grand Total	\$ 345.00+ Tax (if any)
Paid	\$ 345.00
Payment Due	\$ 0.00

- When the rental payment is complete, it will be automatically recorded in Point of Rental Essentials.
- When a contract that is in the **Received** state is paid in full, the rental contract will be automatically **Closed** in Point of Rental Essentials.

VIEW RENTAL CUSTOMERS IN PALADIN

Rental customers and payments are saved in Paladin

Copy Transaction Cancel Transa

Contract #: C-000039

Bill Smith

Company Smith Inc.

Email bill@smith.com

Phone +1 123 456 7890

Address 123 Green St.
Bend, OR 97701

PO # PO #

Customers Credit Balances

Status: Active Customer 8 - BILL SMITH

Rewards 1553073 Address 1 123 Green St.

Recent Sales History

Projects: All ☐ Show Inactive Projects

Date	Employee	Term.	Inv #	PO #
08-Dec-20 01:23	Store Manager	2	37	
08-Dec-20 01:11	Store Manager	2	36	
08-Dec-20 16:42	Paladin Support	2	35	

Invoice / Quote Checkout Cancel

Rewards 1553073 Credit 0.00

Customer 8 - BILL SMITH Address 2 Phone 1234567890

Address 1 123 Green St. City/State/Zip Bend, OR, 97701 Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RENTAL	POINT OF RENTAL TRANSACTION	1	\$ 245.00	\$ 245.00
0	0			245.00			

Contract #: C-000039

NOTES

- Paladin automatically creates customer accounts from rental contracts.
- Subsequent rental payments for the same customer are associated with the same Paladin account.

COLLECT A DEPOSIT

Best practice: How to collect a deposit

Invoice / Quote			Checkout			Cancel			
Rewards	1553073	Customer	8 - BILL SMITH		Address 2			Phone	1234567890
Credit	0.00	Address 1	123 Green St.		City/State/Zip	Bend, OR, 97701		Fax	
Tax	Def	Net	Part Number	Description	Quantity	Price	Extension		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RENTAL	POINT OF RENTAL TRANSACTION	1	\$ 100.00	\$ 100.00		
0	0		1	345.00					
Contract #: C-000039						NOTES			

- The easiest and recommended way to take a deposit is to collect a partial payment.
- When you recall a contract, you can reduce the rental payment amount (**Price**) on the invoice and process a partial payment.

Partial payment →

Totals		Hide Details
Rental Total	\$	300.00
Damage Waiver (15%)	\$	45.00
Grand Total	\$	345.00+ Tax (if any)
Paid	\$	100.00
Payment Due	\$	245.00

Optional: Refundable fee

Contract #: Q-000039

Quote Reservation Order Received Closed

Bill Smith
Company Smith Inc.
Email bill@smith.com
Phone +1 123 456 7890
Address 123 Green St.
Bend, OR 97701

Search Edit

Balance Due \$0.00

Add New Pickup Contact

PO # PO # Edit

Start Today at 5:47 PM Duration 1 week(s) Due 12/10/2020 5:47 PM

Add/Edit Tags

Add Fee Add Rental Discount Add Sale Discount

Search Or Scan An Item To Add.

Search or Scan an item to add.

Contract Picklist Sort

	Item Name	Rate	Quantity	Total Fee	T
	Power Washer	\$ 300.00	1	\$ 300.00	T
	Fee: Refundable Fee	\$ 100.00	1	\$ 100.00	T
	Damage Waiver (15%)	\$ 45.00	1	\$ 45.00	T

Totals Hide Details

Rental Total	\$	300.00
Damage Waiver (15%)	\$	45.00
Sales Total	\$	100.00
Grand Total	\$	445.00+ Tax (if any)
Paid	\$	0.00
Payment Due	\$	445.00

Coupon Code

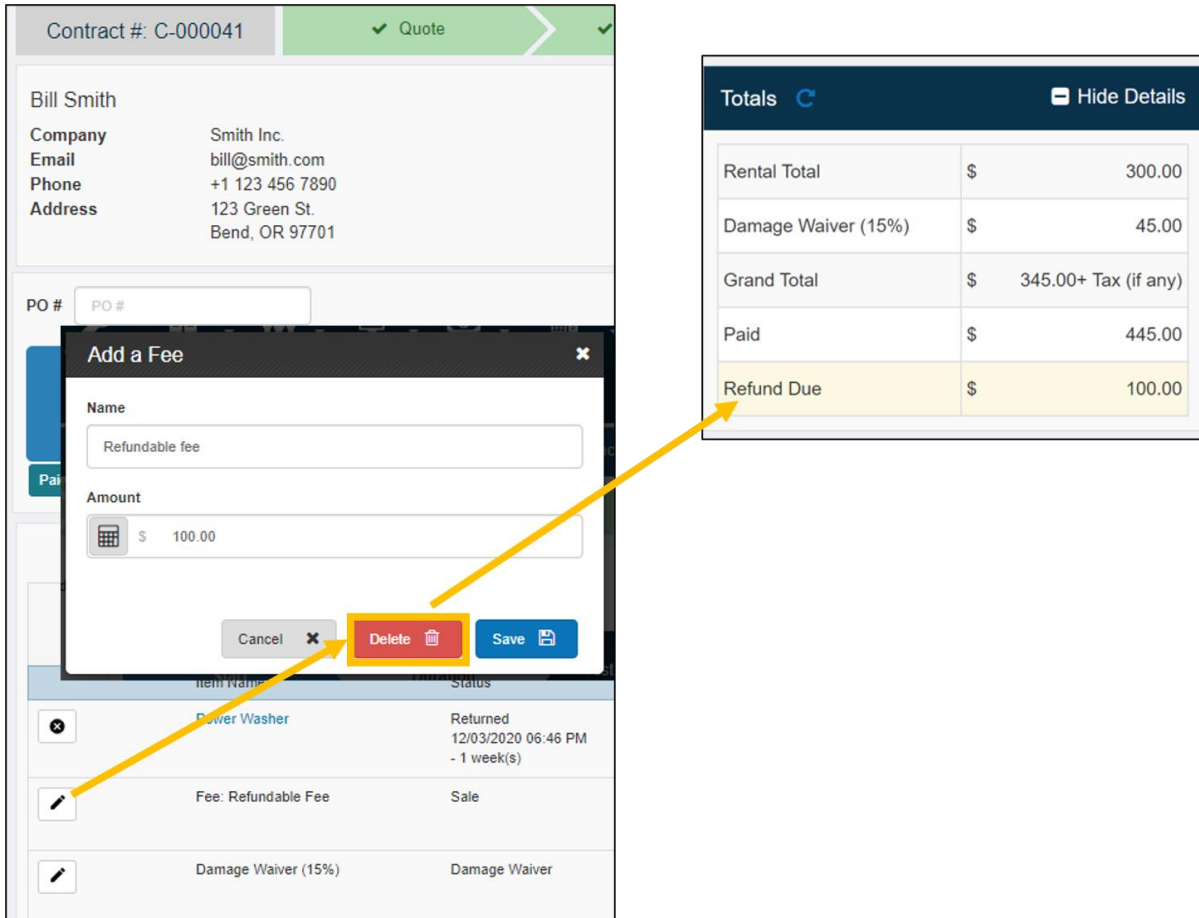
Coupon Code

Choose

If you prefer to add a refundable fee, use the **Add Fee** feature in Point of Rental Essentials.

PROCESS A REFUND

Set up the refund in Point of Rental Essentials



Contract #: C-000041 ✓ Quote

Bill Smith
Company Smith Inc.
Email bill@smith.com
Phone +1 123 456 7890
Address 123 Green St.
Bend, OR 97701

PO # PO #

Add a Fee

Name
Refundable fee

Amount
\$ 100.00

Cancel **Delete** Save

Item Name Status

Power Washer	Returned 12/03/2020 06:46 PM - 1 week(s)
Fee: Refundable Fee	Sale
Damage Waiver (15%)	Damage Waiver

Totals Hide Details

Rental Total	\$ 300.00
Damage Waiver (15%)	\$ 45.00
Grand Total	\$ 345.00+ Tax (if any)
Paid	\$ 445.00
Refund Due	\$ 100.00

- Paladin will process a refund when there is a **Refund Due** amount in Point of Rental Essentials.
- To return a refundable fee, delete the fee from the contract in Point of Rental Essentials to create a **Refund Due** amount.

Process the refund in Paladin

Invoice / Quote

Checkout

Cancel

Rewards 1553073

Customer 8 - BILL SMITH

Address 2

Phone 1234567890

Credit 0.00

Address 1 123 Green St.

City/State/Zip Bend, OR, 97701

Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RENTAL 1	POINT OF RENTAL TRANSACTION EACH	1	\$ -100.00	\$ -100.00
0	0			-100.00			
Contract #: C-000039						NOTES	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
SOH	ORD						

F1 Advanced Lookup

F2 Add Note

F3 Delete Line Item

F4 Discount Item

F5 Account Payment

F6 Store Transaction

F7 Stock Check

F8 Checkout

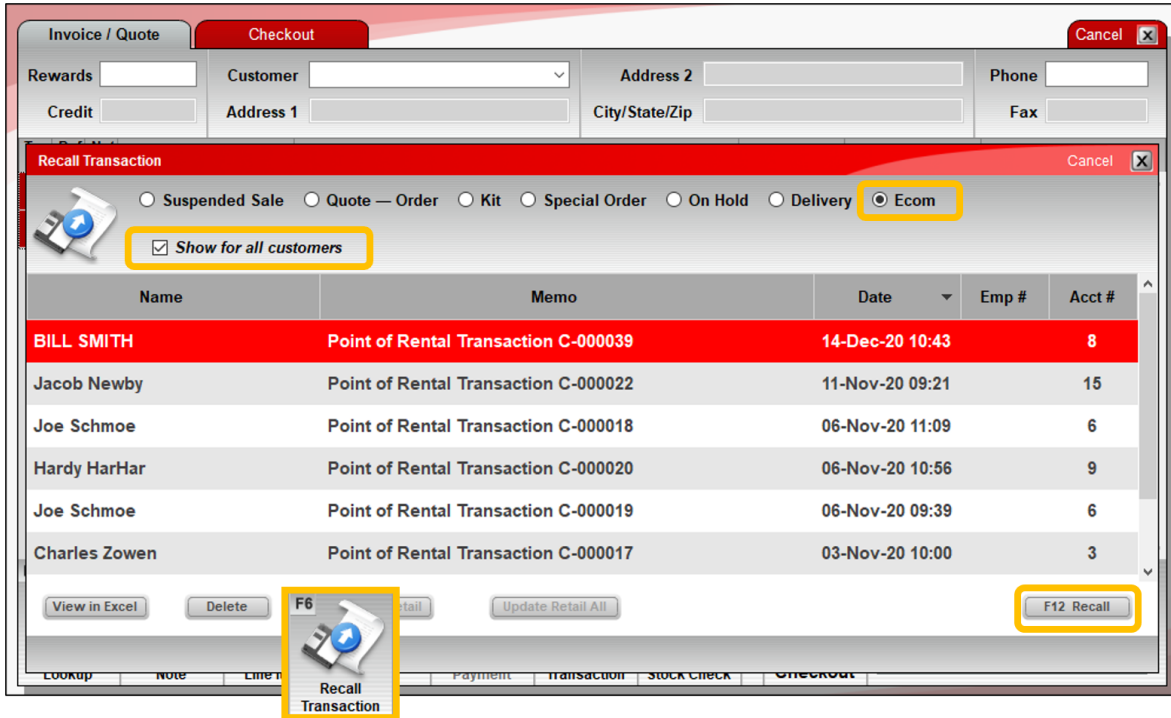
Subtotal \$	-100.00
Tax \$	-1.00
Total \$	-101.00

- In the **Invoice/Quote** module, scan the rental contract barcode to add the rental **Refund Due** to an invoice as a negative **Price**.
- After you process the transaction, the refund is automatically recorded in Point of Rental Essentials.

OTHER WAYS TO RECALL PAYMENTS

Alternate methods for recalling a rental payment

1



Invoice / Quote Checkout Cancel

Rewards Customer Address 2 Phone

Credit Address 1 City/State/Zip Fax

Recall Transaction Cancel

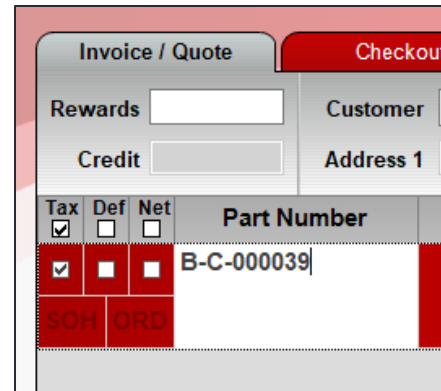
☐ Suspended Sale
 ☐ Quote — Order
☐ Kit
☐ Special Order
☐ On Hold
☐ Delivery
☒ **Ecom**

☒ Show for all customers

Name	Memo	Date	Emp #	Acct #
BILL SMITH	Point of Rental Transaction C-000039	14-Dec-20 10:43		8
Jacob Newby	Point of Rental Transaction C-000022	11-Nov-20 09:21		15
Joe Schmoe	Point of Rental Transaction C-000018	06-Nov-20 11:09		6
Hardy HarHar	Point of Rental Transaction C-000020	06-Nov-20 10:56		9
Joe Schmoe	Point of Rental Transaction C-000019	06-Nov-20 09:39		6
Charles Zowen	Point of Rental Transaction C-000017	03-Nov-20 10:00		3

View in Excel Delete **F6** Recall Transaction Update Retail All **F12 Recall**

2



Invoice / Quote Checkout Cancel

Rewards Customer

Credit Address 1

☒ Tax
☐ Def
☐ Net
Part Number

☒ SOH
☐ ORD
 B-C-000039

In addition to scanning the contract, you can recall a rental contract payment these ways:

1 Click **Recall Transaction** [F6]. Then, select **Ecom** and **Show for all customers** to view contracts with a non-zero payment due.

2 Enter B-C-<contract #>, and press Enter.

Example: If the contract # is C-000039, enter B-C-000039.

REQUIREMENTS AND COST

Integration Requirements

- Point of Rental Essentials subscription
- Paladin Point of Sale subscription
- An available tax setting in Paladin
(for locations that incur a rental tax)*

*If all three Paladin tax categories are in use, we recommend [Avalara AvaTax](#) for tax compliance. For more information, contact Paladin Support.

Paladin Integration Cost

- One-time setup fee: \$249
- Monthly subscription: \$29

*Point of Rental Essentials must be purchased separately

Learn more

[KBA: Overview: Point of Rental Essentials Integration](#)

[KBA: Point of Rental Essentials User's Guide](#)

[Webinar: Point of Rental International User Meeting](#)

To get started, contact Paladin Support.

Next webinar:

Keeping up with Evolving Technology

January 12 @ 9am PT

Register: portal.paladinpos.com/webinars



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