UNIVERSITY

Draw More Customers with Rentals

Point of Rental Software

Charles Owen

Chief Experience Officer

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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 Software

- 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

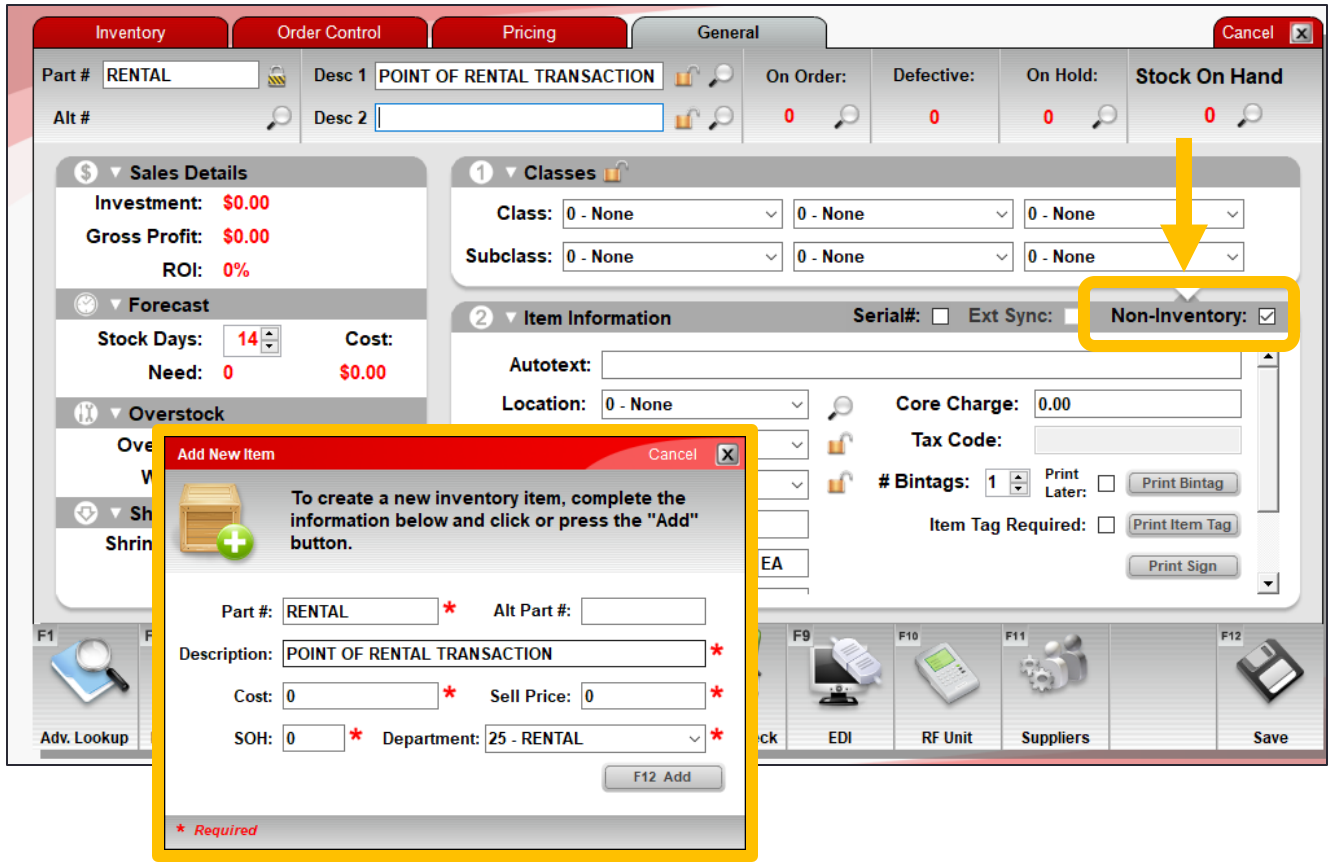
POINT OF RENTAL ESSENTIALS

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



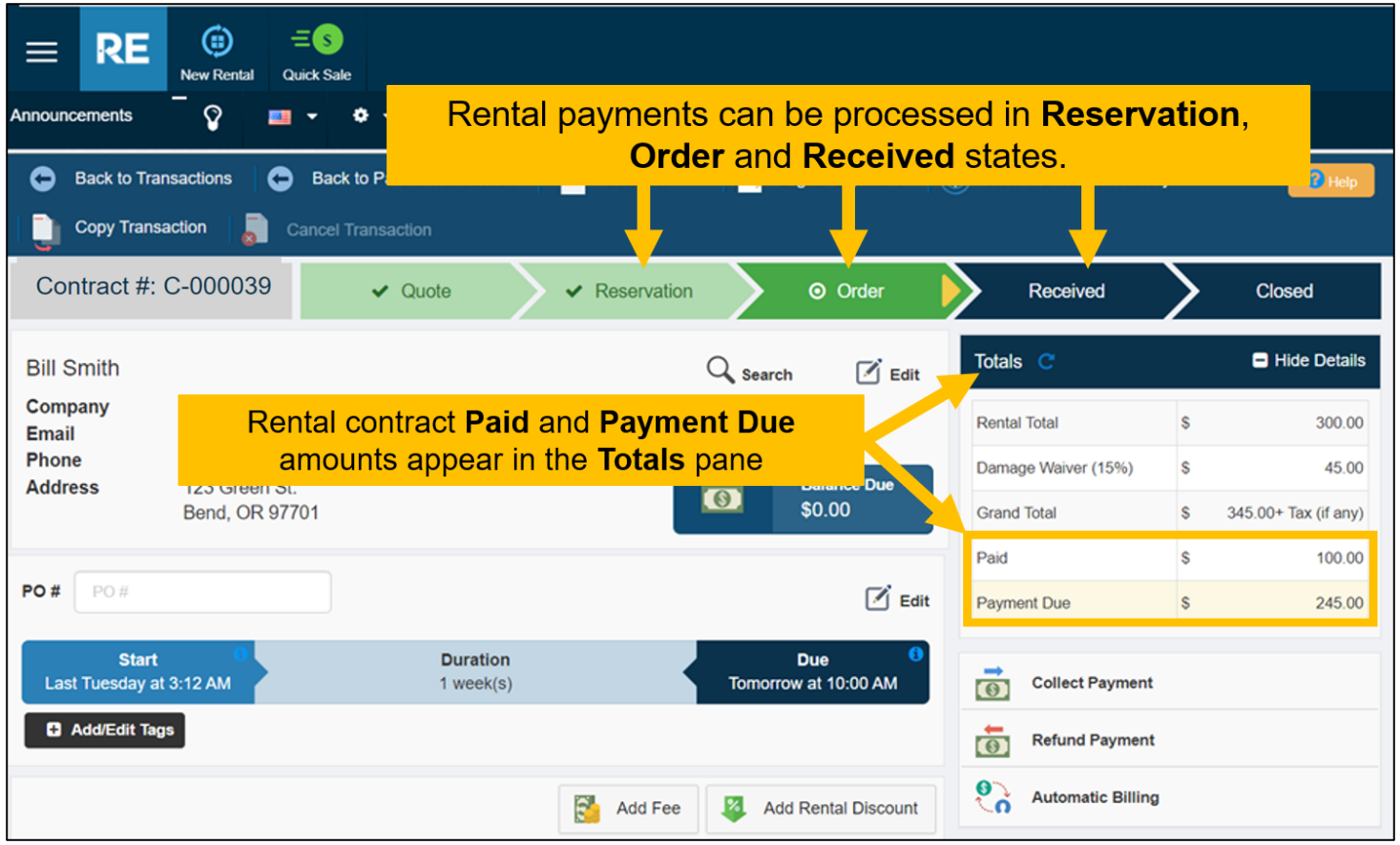
During the integration setup process, Paladin Support will create:

- 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.

PROCESS A PAYMENT

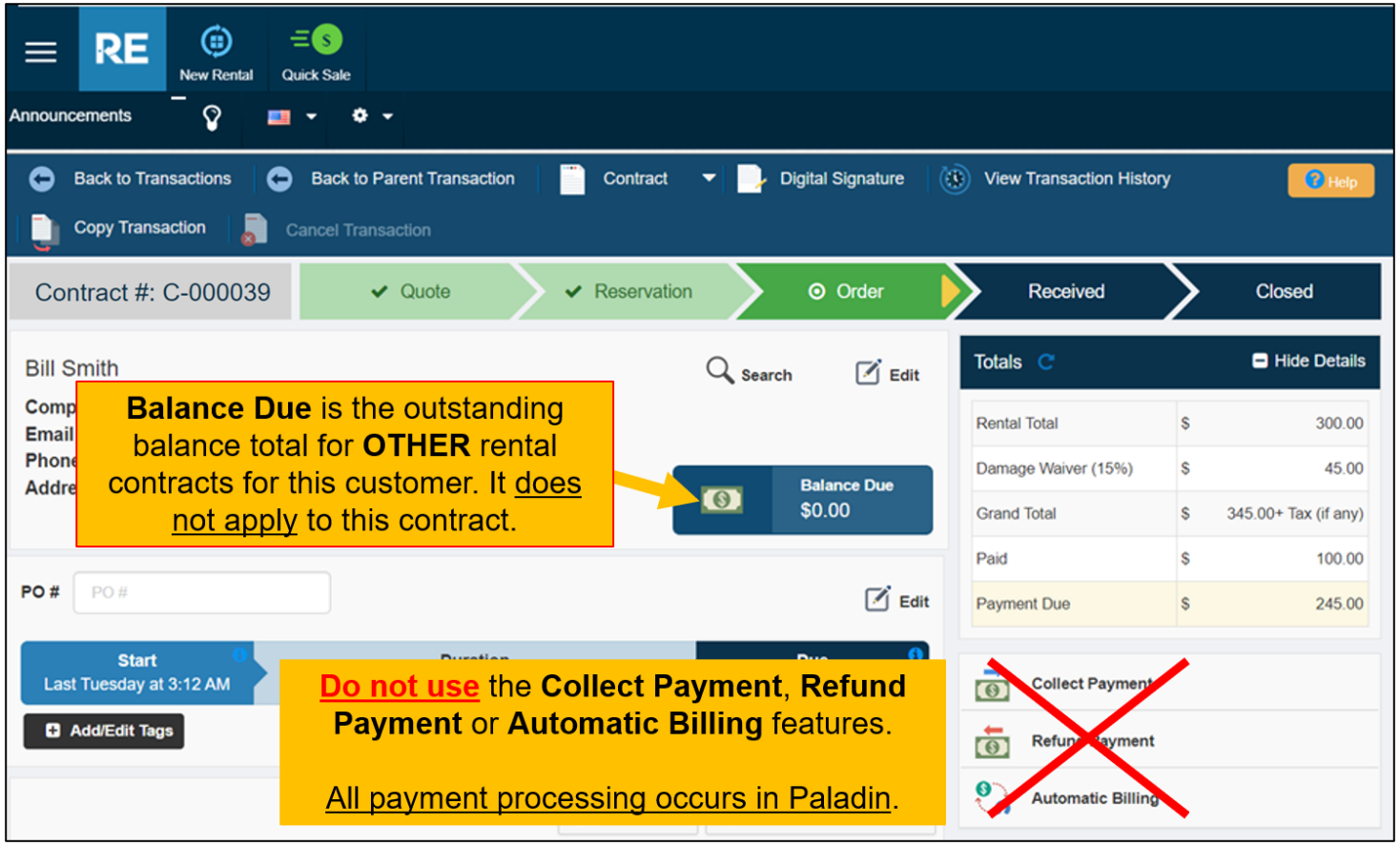
When to process a rental payment



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:

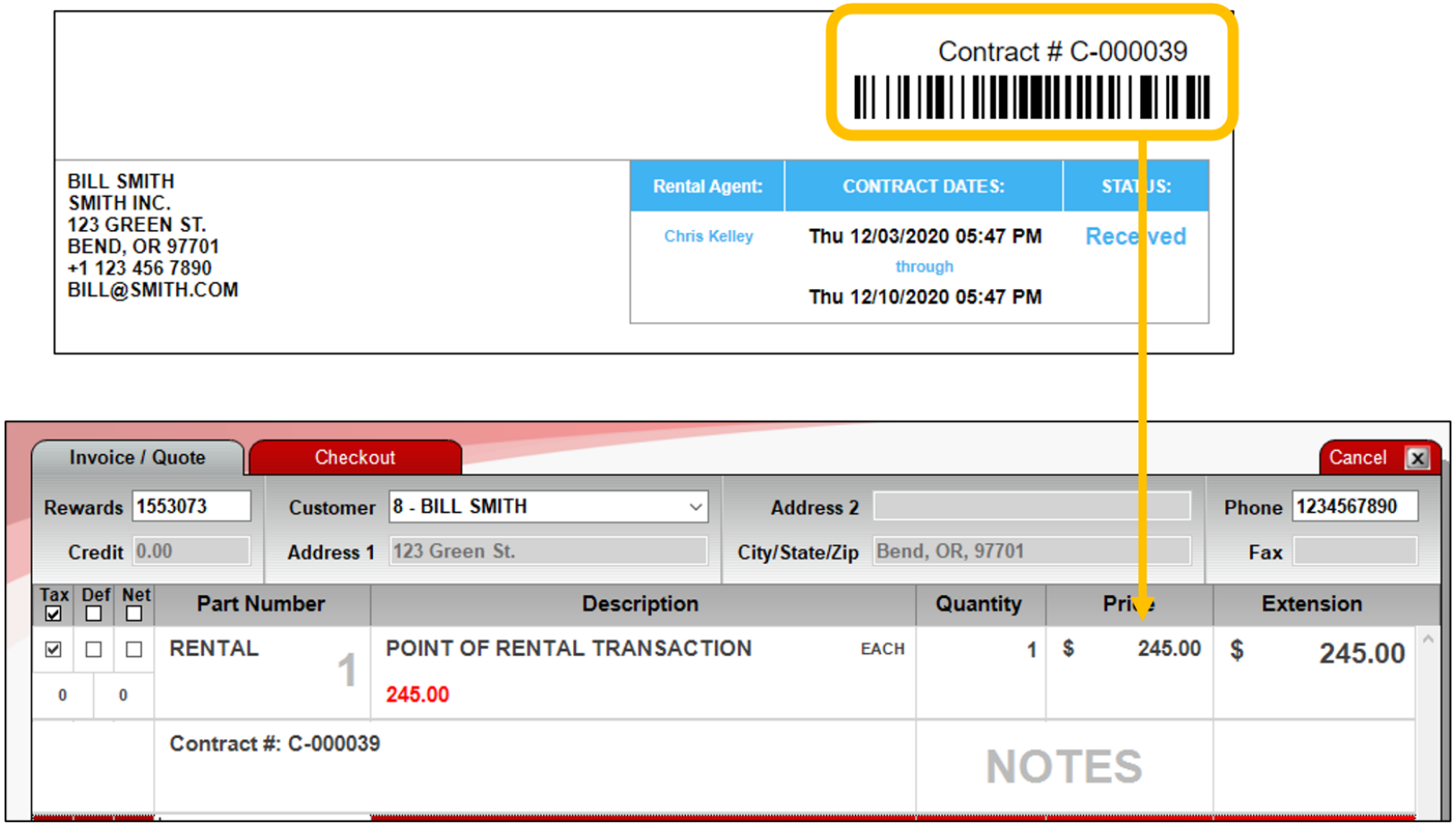
- **Reservation**
- **Order**
- **Received**

All payment processing occurs in Paladin



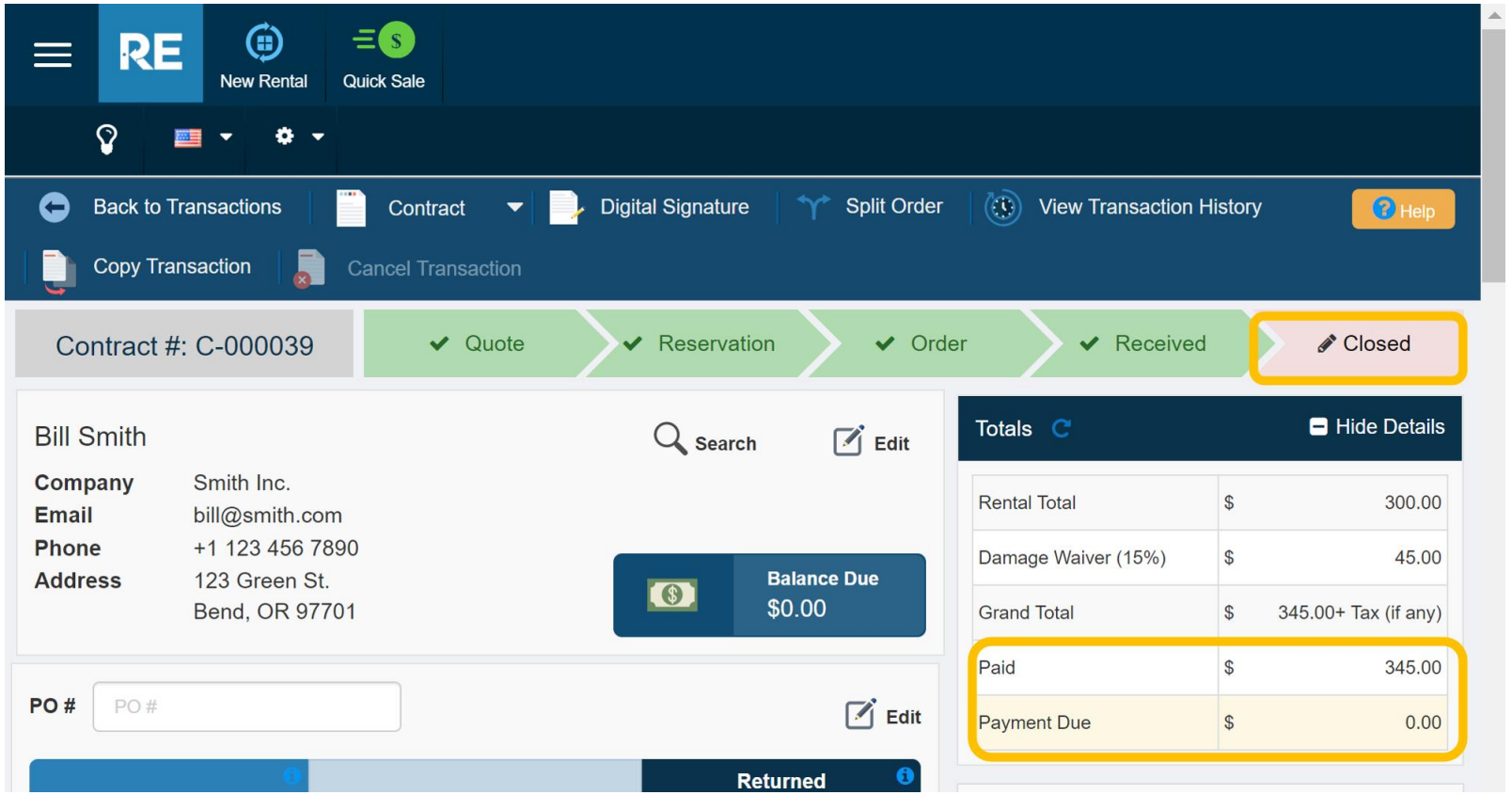
- Payment processing occurs solely in Paladin.
- Do not use the payment features in Point of Rental Essentials.

How to recall the rental payment in Paladin



- 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.

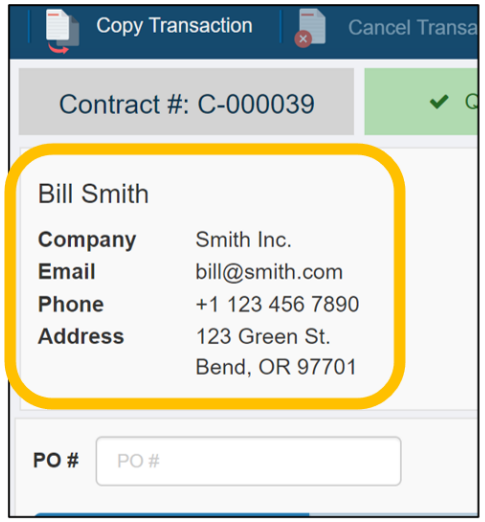
What happens when the payment completes

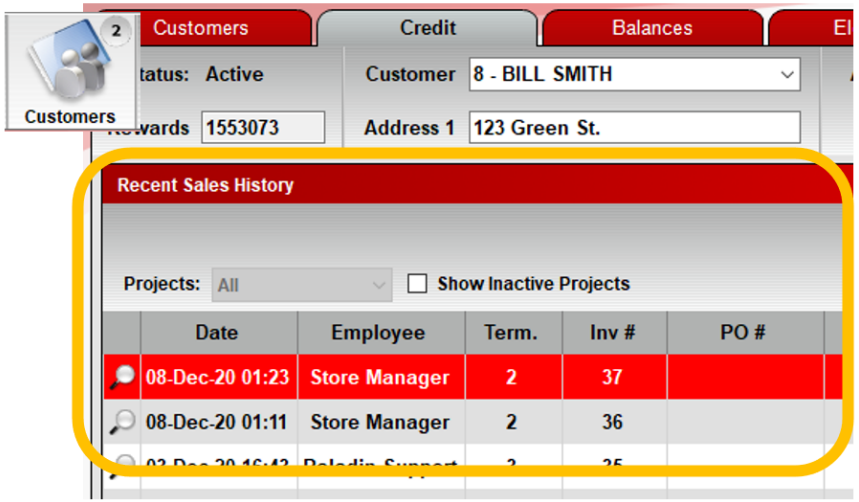


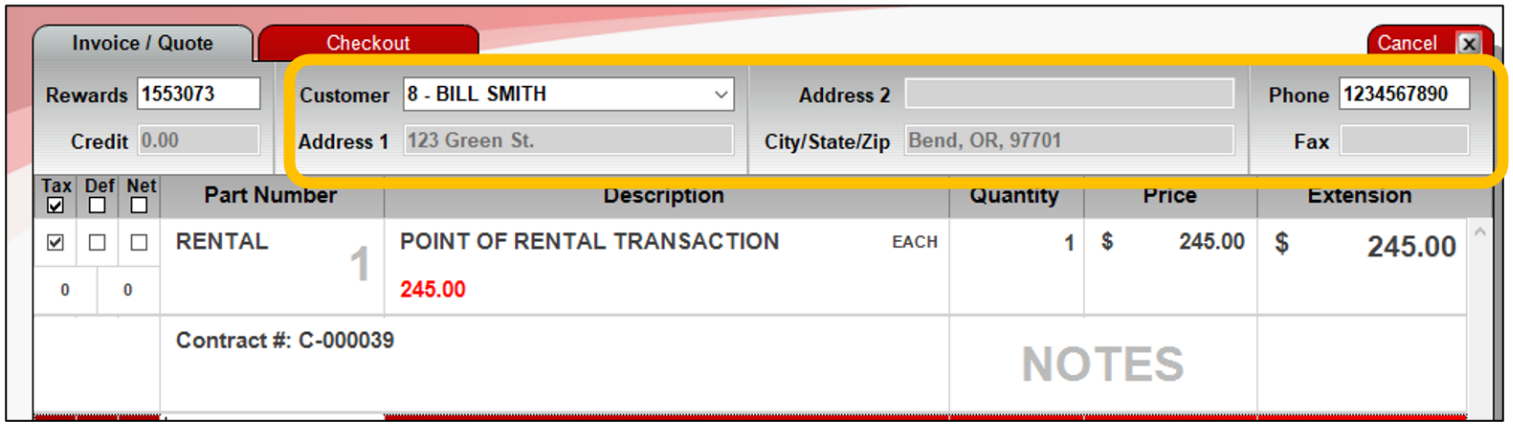
- When the rental payment is complete, it will be automatically recorded in Point of Rental Essentials.
- When a contract that is in the **Received** state is paid in full, the rental contract will be automatically **Closed** in Point of Rental Essentials.

VIEW RENTAL CUSTOMERS IN PALADIN

Rental customers and payments are saved in Paladin



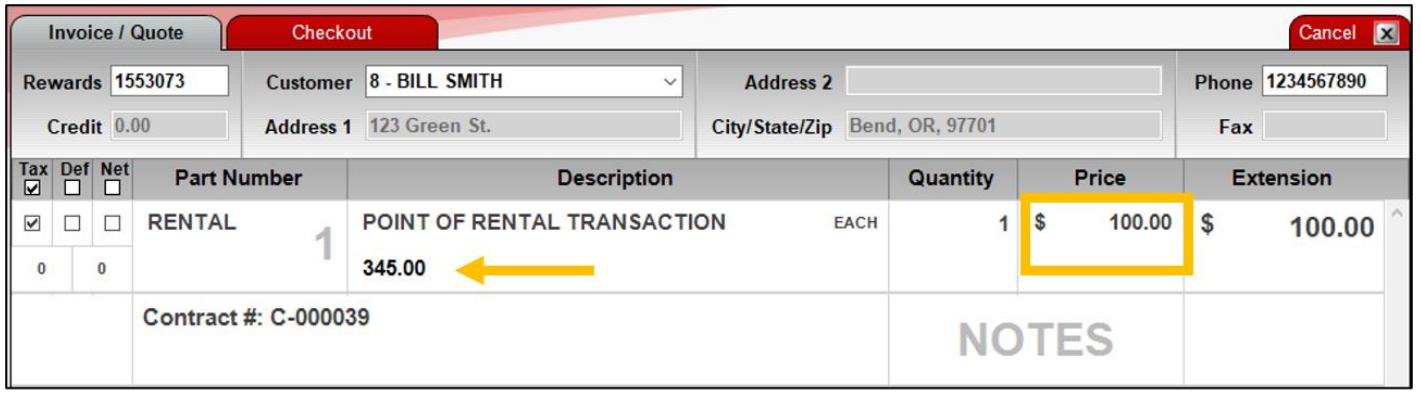


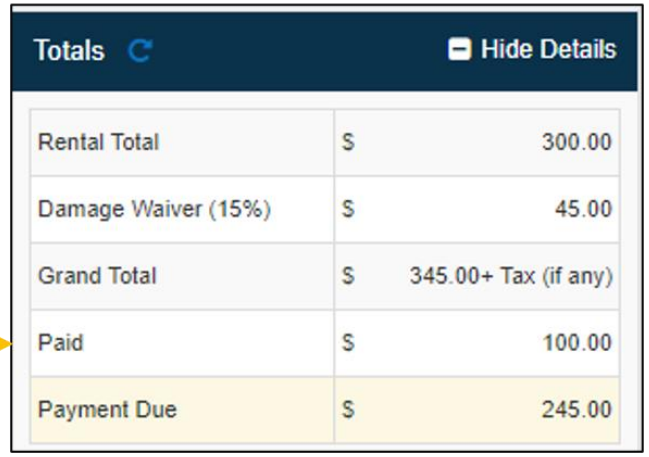


- Paladin automatically creates customer accounts from rental contracts.
- Subsequent rental payments for the same customer are associated with the same Paladin account.

COLLECT A DEPOSIT

Best practice: How to collect a deposit

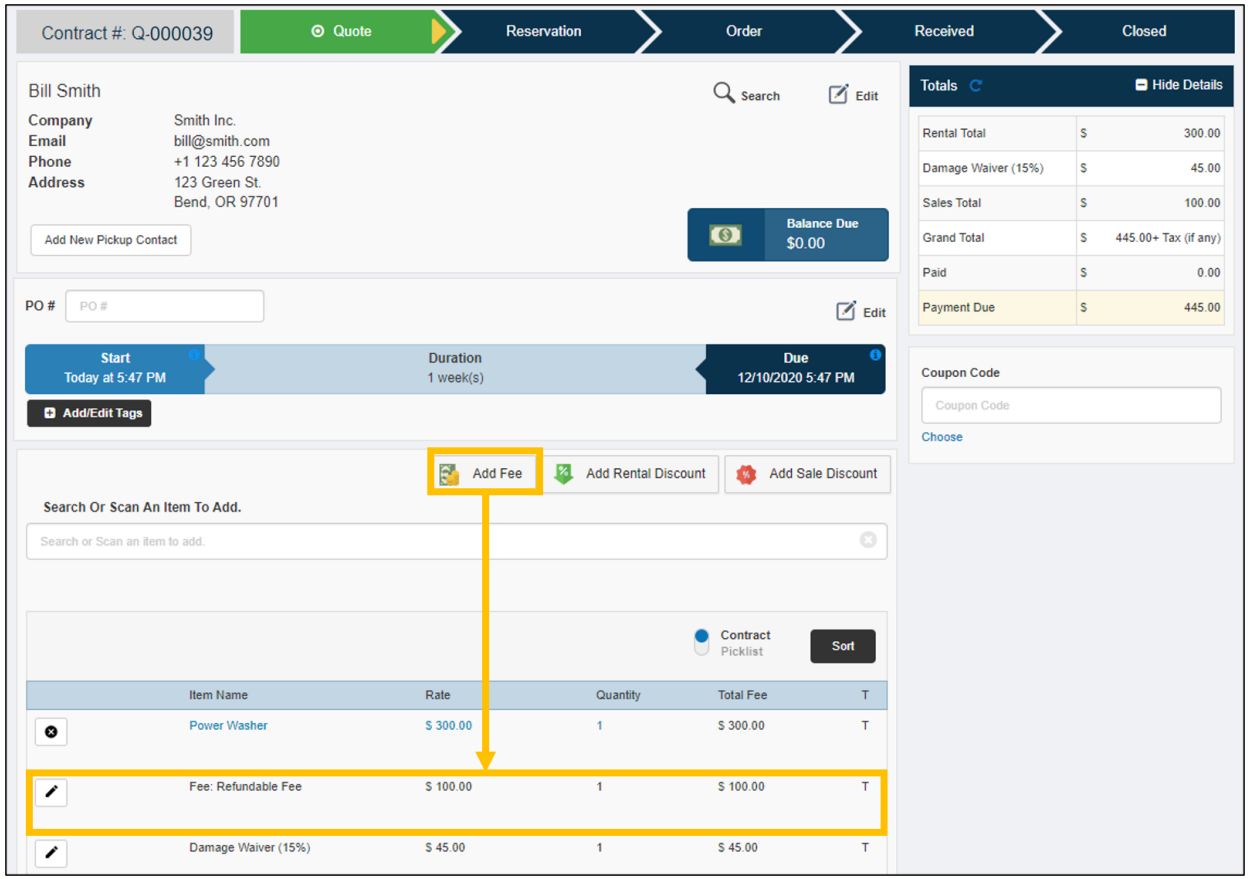




Partial payment

- 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.

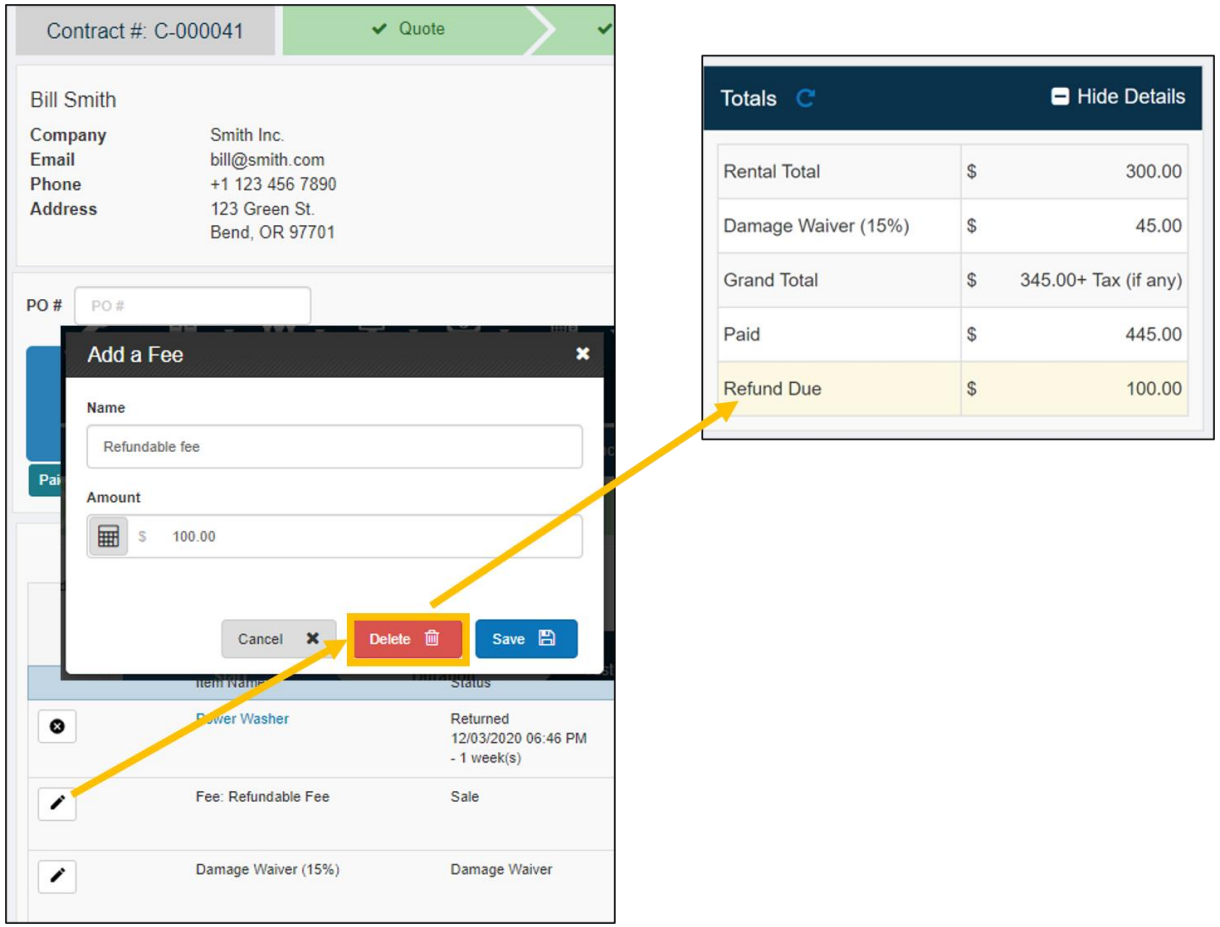
Optional: Refundable fee



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

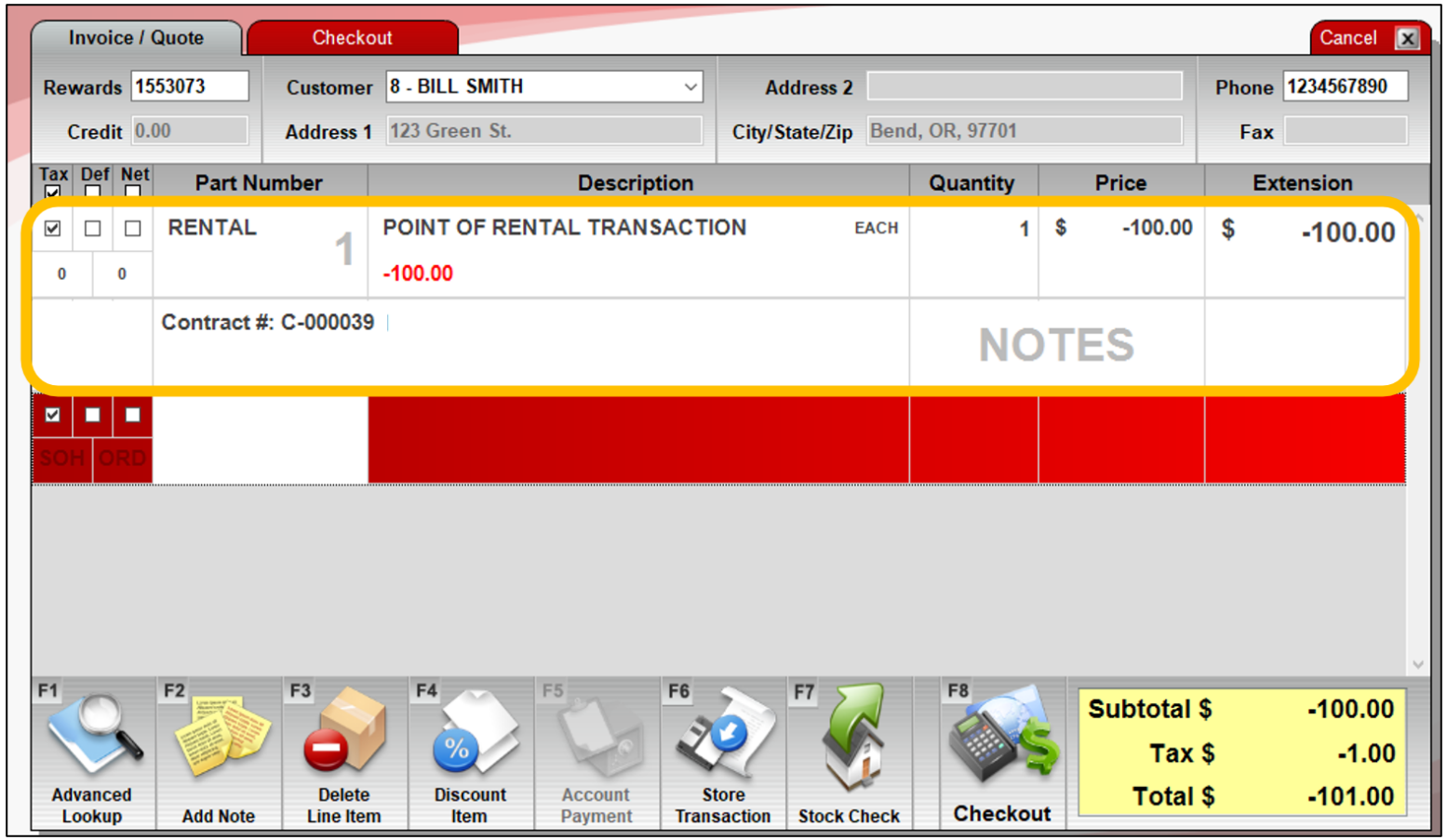
PROCESS A REFUND

Set up the refund in Point of Rental Essentials



- 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

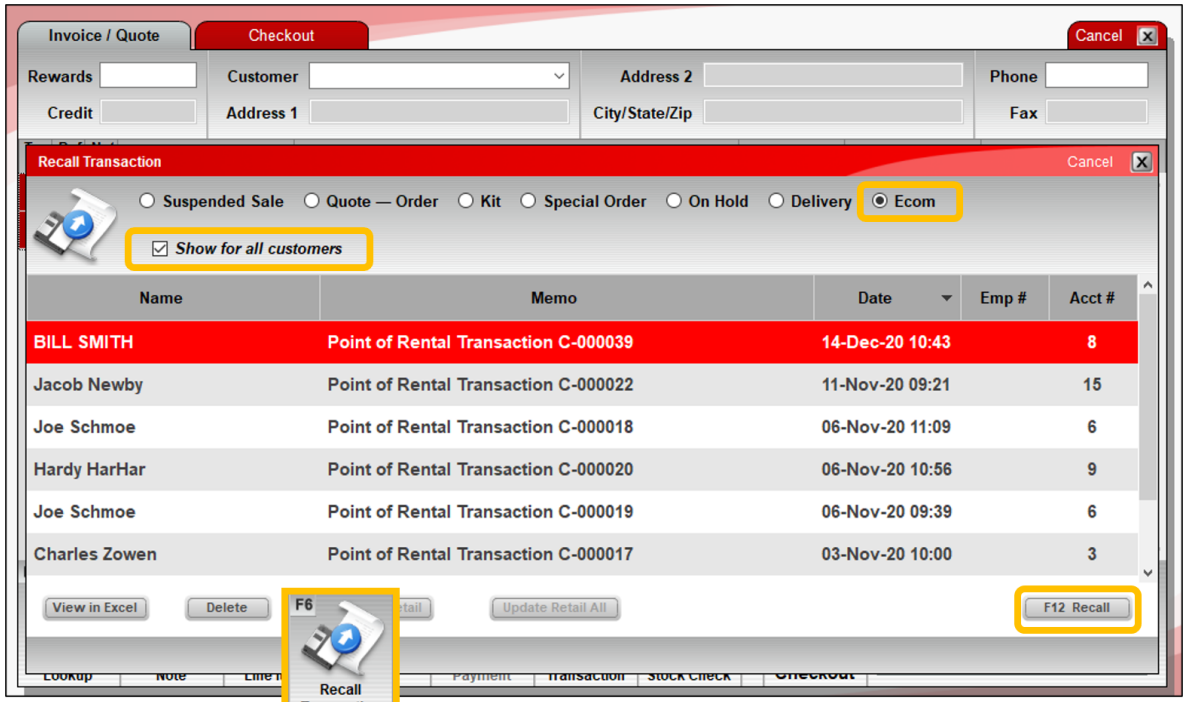


- In the **Invoice/Quote** module, scan the rental contract barcode to add the rental **Refund Due** to an invoice as a negative **Price**.
- After you process the transaction, the refund is automatically recorded in Point of Rental Essentials.

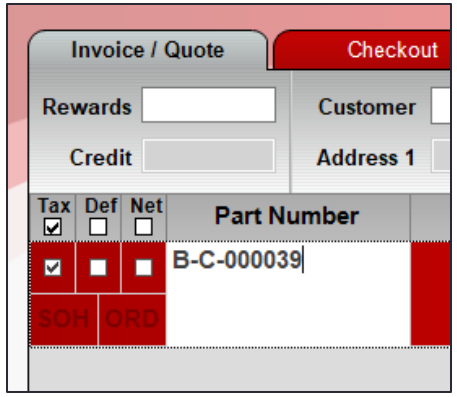
OTHER WAYS TO RECALL PAYMENTS

Alternate methods for recalling a rental payment

①



②



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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