AUTOMATED
RENTAL
MANAGEMENT
SOFTWARE

A FULLY INTEGRATED RENTAL PLATFORM

ARM
AUTOMATED RENTAL MANAGEMENT

sage | Development Partner

ARM Software for Every Rental Industry

Automated Rental Management provides functionality out of the box to meet and adapt to a variety of rental industry requirements, including yours. Whether for party and event rental companies with unique change order needs, heavy equipment companies with multi-site inventory and maintenance, portable sanitation companies with regularly scheduled service routes, or a tool rental business with multiple channels, ARM is the only rental management system with the depth, breadth and flexibility of functionality to meet these needs. The functionality to support your particular business and vertical within the rental industry has been built into the core product from the ground up, not a bolt-on afterthought.

Developed from experience working with thousands of companies in a variety of industries, ARM's rental industry-specific software solutions help you get up and running faster with the capabilities of Sage Software's ecosystem of business management applications—including CRM, accounting/ERP, fixed assets, human resources and more—while addressing your specific challenges.

Spanning equipment, party and event, trench shoring, traffic safety, scaffolding, housewares, audio/visual, general tool, trailer and storage rentals, Automated Rental Management offers the widest array of solutions to manage your entire rental business, all in one platform.

"With the increased complexity of new offices and territories, ARM gives us scalability for growth and insights across our multiple locations." — **National Trench Safety**

"It was the very best software implementation I have ever been part of."

M6 CONCRETE ACCESSORIES

Invested in Your Success

With thousands of successful implementations amassed over the past three decades, our team has a deep understanding of small and mid-sized companies rental industry and the many challenges that they face. Along with a unified platform to run your entire rental business, the team behind Automated Rental Management—BCS ProSoft—offers a complete program of professional services, training and support designed for its customers' success.

BCS ProSoft also offers strategic partnerships with global software developers like Sage Software, which further ensure that ARM can be integrated and customized to drive success. We also partner with a variety of solution providers, CPA's, consulting firms, and technology partners so that you receive the best support leveraging our rental solution no matter where your business is located.

Grab a seat and enjoy.
Read Time: 8 minutes

AUTOMATED RENTAL MANAGEMENT

KEY FEATURES

1. **Accounting & Financials**
   Seamless accounting functions powered by the Sage 100 accounting system.

2. **Inventory Management**
   Manage every aspect of rental and sales inventory with real-time information.

3. **Contract Management**
   Create contracts from the counter or phone more efficiently and accurately.

4. **Advanced Delivery Routing**
   Plan delivery routes, balance work loads, reduce driver overtime and fuel costs.

5. **Equipment Maintenance**
   Track vital details and maintenance history of serialized equipment and inventory.

6. **Cash Management**
   Integrated with AR to take deposits and payments from multiple POS terminals.

7. **Custom Alerts & Workflows**
   Create complex alerts and workflows to trigger when certain criteria are met.

8. **Multi-User & Multi-Location**
   Built for companies with multiple users, locations, warehouses or entities.

WHY ARM SOFTWARE?

ARM Rental Software is powered by the CPA-recommended Sage 100 enterprise resource planning (ERP) system. This solution seamlessly integrates all accounting, order management, inventory, and routing functions providing a comprehensive solution to manage your entire business and streamline your most critical business processes.

FULLY INTEGRATED PACKAGE
ARM unifies your front and back-office functions in real-time without the messy 3rd-party integrations and manual updates.

FLEXIBLE & SCALABLE
ARM is designed to grow with you. Add users or features such as payroll or CRM as your business requirements change.

BUILT TO LAST
ARM leverages the multi-million dollar research and development budget of Sage Software to deliver consistent updates and new feature enhancements.

INVESTED IN YOUR SUCCESS
In business since 1986, we provide training, support and premier consulting services. All customers are assigned a dedicated Account Manager and Project Manager throughout their implementation.

Accounting & Finance

At the heart of ARM is the Sage 100 accounting system, which provides a framework for managing your General Ledger, Accounts Receivable, Accounts Payable, Bank Reconciliation and Assets. The depth of functionality combined with ease of use and intuitive workflow are unrivaled in mid-market products.

ARM's seamless integration with Sage 100 unifies all accounting, order management, inventory, and routing functions to streamline critical business processes. As an all-in-one system, ARM utilizes a single database for rentals and accounting meaning it requires fewer resources and doesn't need to be synced via a third-party integration. The unified system architecture ensures complete visibility into your rental company's financial performance from a consolidated level down to individual transactions.

Trusted by thousands of organizations worldwide, the Sage 100 Enterprise Resource Planning (ERP) solution is built to last with millions of dollars spent each year on continued development of regular updates to deliver new features, maintain compliance with federal regulations like the Affordable Care Act (ACA), and adhere to GAAP accounting standards. Numerous training and support options are available to you through Sage's expansive partner network of systems integrators, business consultants and CPA's all dedicated to your success with Sage.

GENERAL LEDGER
General Ledger is the central location where all accounting transactions are received,

KEY CAPABILITIES
- Real-time inventory information **searches** all locations and warns users of overbookings.
- Customer-specific pricing, memos and credit limit notifications are displayed.
- Establish pricing schedules, quantity breaks, and show on-screen reminders for accessory items.
- Include sales and rental items on the same contract and even write sales contracts.
- Enter of multiple deposits and receipts and show cumulative billing totals per contract.
- Send important documents such as contracts, picking sheets and instructions directly to your customer or warehouse.
- Commission reporting for sales reps.
- Track contract changes by user ID.

summarized, adjusted and balanced, yielding comprehensive financial statements. Powerful drill-down capabilities both into general ledger transactions and into subsidiary modules provide exceptional audit trails and quick answers to inquiries.

ACCOUNTS RECEIVABLE
Effective cash management requires more than simply knowing who owes you money, how much, and for how long. Accounts Receivable tracks customer information

BEST IN CLASS

"Sage 100 has been a part of the business for so long that we rarely think about it consciously—it just works. And it continues to improve and evolve to meet our needs."

PACKAGING SPECIALTIES

giving you the data you need to run a well-organized cash management system by tracking receivables and planning cash flow. Informative reports present your vital data in a clear and sensible format.

ACCOUNTS PAYABLE
Accounts Payable helps arrange expenditures by recording transactions and obligations to vendors and creditors. A selection of payment options from automatic invoice selection to quick check entry provides great flexibility in scheduling payments. Accounts Payable also helps forecast cash requirements, capitalize on discounts offered, and analyze your purchase history by vendor.

BANK RECONCILIATION
Connect your bank account to simplify your monthly reconciliation process, detect recorded transactions between books and bank, locate the errors or differences, record the corrections, and reconcile your books to the bank statement.

ASSET MANAGEMENT
Automatically calculate depreciation and track who is responsible for your rental assets or other business assets – eliminating the need for spreadsheets.

BUSINESS INTELLIGENCE
A powerful reporting engine gives you meaningful insights into your business information. Realizing true value-added insights, business users gain visibility to identify issues, trends, and opportunities and instantly drill down to the underlying transaction to take action. Users can easily create their own reports without help from IT or a programmer.

Inventory Management

Lack of visibility into product demand can lead to spending more to rush product in and over-committing inventory can result in customers viewing you as undependable. That's why it's imperative to have accurate and current data available. Quantities on hand, quantities committed, when an item is due in, the warehouse location and rental pricing are all vital to the operation of an efficient customer-service oriented business.

ARM empowers you to manage every aspect of your inventory with the ability to create new or improved purchasing policies, rental/sales policies, warehousing programs, and pricing methods. ARM delivers a set of rental-specific inventory management so that you can manage reservations for today, tomorrow or next month to properly plan for demand.

INVENTORY MAINTENANCE

ARM's Inventory Maintenance function is the storehouse for all item data. Here you can quickly switch your view from rental-specific data to sales and general data such as the product line, valuation method, etc. A convenient tab system lets you move quickly to locate the data in which you are most interested.

RENTAL RESERVATIONS

Interpreting reservations and inventory data easy to understand with the Reservations Inquiry screen. Accessed from almost everywhere in the system, users can scroll through a calendar interface displaying item quantities available, on rent, to be returned, and on a purchase order on any given day.

KEY CAPABILITIES
- Give sales better visibility with the ability to see item availability and status across all locations or warehouses.
- Respond to customers with speed and precision with up-to-the-minute inventory information.
- Control costs with detailed bills of charges for items and kits including maintenance.
- Accurately estimate needs to ensure you have the right products on hand to rent or sell when you need them.
- Fulfill orders accurately with real-time information on your assets, including receipt, location, value and status.
- Create better purchase order records including price, who places the order, and special shipping instructions.

You can view totals for a single warehouse or across all locations. From here you can drill down to a list of the open contracts referencing the item. Then drill down further into each individual contract.

SERIALIZED INVENTORY

ARM maintains a database of serial numbers for both lot and serialized items to track individual pieces of equipment or collections. You can easily view status such as available, on repair, and on rent for each individual item.

RENTALS BY INVENTORY ITEM

ARM makes it easy to see the number of rentals by item and quickly toggle between
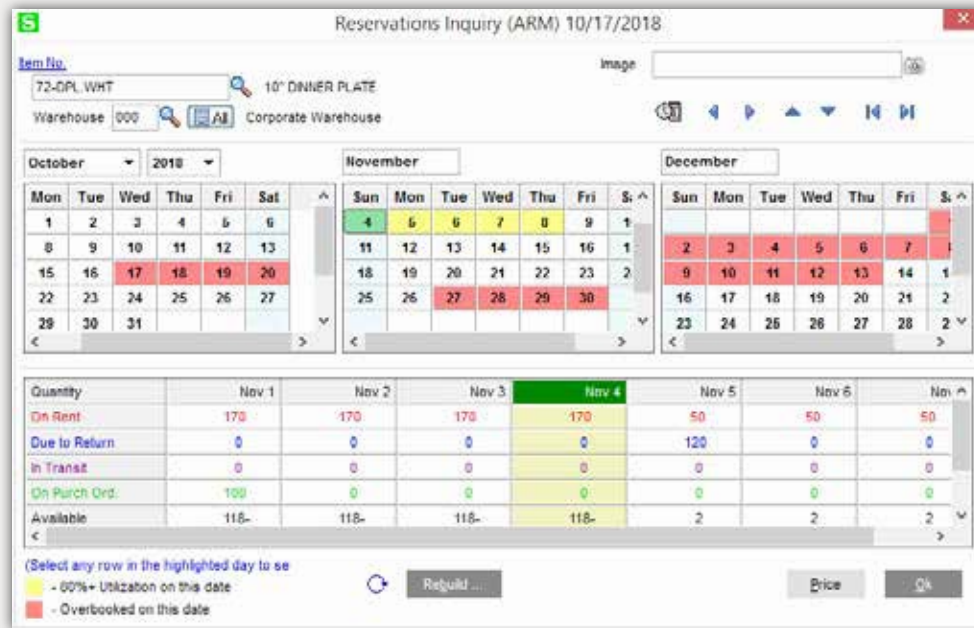
ARM's Reservation Inquiry screen displays a calendar view of the number of items available, on rent, to be returned, or on a purchase order for any given day. Users can view availability across all locations and can easily drill down to the contract level.

viewing rental contracts and sale contracts. You can view a summary of all open contracts and then drill down into the details of each individual contract.

RENTAL RATES BY LOCATION
ARM lets you specify complete rental rate tables for each warehouse or location. If all of your locations have the same rate, the default pricing record is used. When setting rates by location you can copy rate records from another item to speed data entry.

ITEM BILLING METHODS
ARM has a powerful billing engine that supports complex pricing structures and a wide variety of billing methods. Bill by the hour, day, month, anniversary, event or define your own rate calculations for billing methods. You can even vary the rental rate by quantity

to offer volume breaks to customers.

GRANULAR DETAILS & OPTIONS
ARM allows you to get granular with inventory options such as specifying a tax class, commission method, and damage waiver amount as well as view history and discount options. ARM maintains constant information about each item, including base minimum rent amount and the rental unit of measure.

"ARM is so manageable — Inventory, Reservations, and Billing are all integrated, which allows us to be more efficient and productive." — **Prairie Supply**

Contract Management

CONTRACT ENTRY
Efficiently create new contracts in seconds with calculated dates for pickup and delivery.

PRINT & SEND
Print, email, or fax important documents or picking sheets upon saving the contract.

CUSTOMER DATA
Customer information is automatically retrieved from your Accounts Receivable data.

DELIVERY & PICKUP
Delivery and pickup codes may be entered to assigned a route and stop.

When you create a contract, you need the required information readily available. Data such as your customer's mailing/shipping address and billing terms are necessary as is the availability and pricing of the items they request. ARM's intuitive screen layout facilitates rapid data entry by auto-filling customer information from Accounts Receivable – eliminating the need to manually re-key data across multiple systems. By automating much of the data entry, ARM increases the efficiency and accuracy of your staff. All customer and item data is stored in a single database so new orders pull in the most recent information and maintains the integrity of existing orders.

ARM lets you create rental and sales contracts, sales orders, repeating ales orders, and price quotes from the same screen so that you don't have to access two different applications. You can even consolidate orders to have both rentals and sales on

KEY CAPABILITIES

- Real-time inventory information searches all locations and warns users of overbookings.
- Customer-specific pricing, memos and credit limit notifications are displayed.
- Establish pricing schedules, quantity breaks and show on-screen reminders for accessory items.
- Include sales and rental items on the same contract and write sales contracts.
- Enter of multiple deposits and receipts and show cumulative billing totals.
- Send important documents, contracts, picking sheets and instructions directly to your customer or warehouse.
- Commission reporting for sales reps.
- Track contract changes by user ID.

the same order. From here, you can print documents, adjust billing terms, process payments, schedule service dates, and more.

CONTRACT ENTRY

With Automated Rental Management, contracts are managed centrally and collaboratively. Users can select an existing customer to retrieve their billing, shipping, and contact information as well as any special pricing or memos from Accounts Receivable. New customers and items can be created on the fly.

Once a Ship Date is selected, the Pickup, Date, Due In Date, Terms Code, Split Commissions, FOB point, Warehouse, paperwork printing controls, and Billing Cycle dates and times are automatically populated. You can also enter information for contracts, quotes, master, and repeat orders as well as set delivery and pick up codes to show the contracts assigned route and stop.

CONTRACT ADDRESS

The Address tab includes the billing and shipping address or equipment location for this contract. This is where you can view and edit the customer's billing address, select

a shipping address, or add a new shipping address.

LINE ENTRY

Contract Entry maintains a real-time relationship with Inventory and Reservations, ensuring that each line item entered is queried against prior commitments, so you do not make promises you cannot keep. Separate pricing schedules for rental and sale transactions provide ultimate control.

ITEM ENTRY

The Lines tab includes information describing each rental or sale product or service for which the customer is being billed. Use the Lines page to enter the inventory items and/or miscellaneous charges the client has requested. Applicable item information is automatically retrieved from Inventory. Comments may also be added to the line section and new items may be easily added.

CONTRACT HISTORY

View a summarized history of each contract, including the amount invoiced to date, times billed, payments to date, and gross profit.
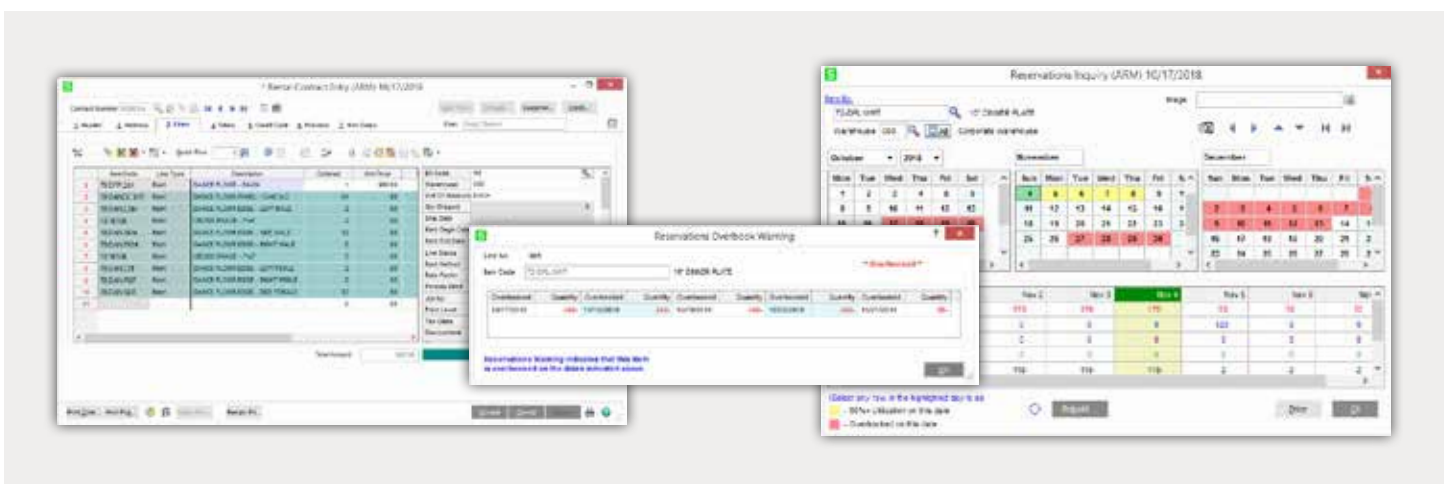
"The impact of automating our rental items and creating proposals has been tremendous. We would not have been able to handle the additional volume without ARM." — **SHAG CARPET**

CONTRACT PAYMENT

Enter any number of deposits against a contract, specifying the Receipt Type (cash, check, credit card, etc.), Date, Amount, and additional receipt type-specific data such as credit card number, expiration date, and phone number. Deposits are posted for reconciliation with the day's deposits and posting to Accounts Receivable.

CONTRACT TOTALS

The Totals Tab includes the rental and sale contract totals, freight amount, total sales tax, deposits, etc. From the Totals page, the contract totals are calculated and displayed automatically. You may enter discounts, override commissions, change the calculated freight amount, view and change tax detail, and maintain any deposits received against this contract.

"When we create a proposal, the items are committed to that client. If another client wants that same item, we are alerted and can call the first client to see if they want to move ahead with the contract helping us increase sales. Our clients appreciate it because we hold items for them even if they have not signed the contract yet." — **SHAG CARPET**

Routing Management

Using a spreadsheet to manage daily routes is labor intensive and needs to be constantly updated as new orders are created. An efficiently designed route saves valuable time, balances drivers' workloads, reduces overtime, minimizes fuel costs, and enables better delivery predictions. ARM features a complete route management system designed to streamline dispatching of deliveries and service routes with point-and-click options to add or remove stops.

ROUTE MANAGEMENT

ARM helps dispatchers create and maintain routes, assign contracts to stops, and easily view routes and stops. Creating routes and adding stops to is intuitive and can be done by searching for the contract or scanning a bar code. A read-only view of routes is available for sales and customer service staff to provide timely delivery window updates to customers.

MOBILE SIGNATURE CAPTURE

When an order is delivered your drivers can quickly pull up the contract on any mobile device and accept a signature to confirm receipt of the delivery and the signature is stored with the contract.

COLOR-CODED USER INTERFACE

Dispatchers and customer service reps see real-time delivery status for multiple stops/routes, allowing them to proactively notify customers of delays. A color-coded UI shows unassigned or delayed deliveries in red and change orders appear in yellow so that they can be processed before being shipped.

VEHICLE MAINTENANCE

ARM keeps track of detailed vehicle information including empty and capacity weight, odometer reading, VIN, license plate number, inspection date, last service date, and when the next oil change is scheduled.

ROADNET ANYWHERE® INTEGRATION

ARM features a native integration to the Omnitracs Roadnet Anywhere platform – encompassing fleet routing, dispatching, telematics, proof of delivery and more. Once an order is placed in ARM it is pushed to
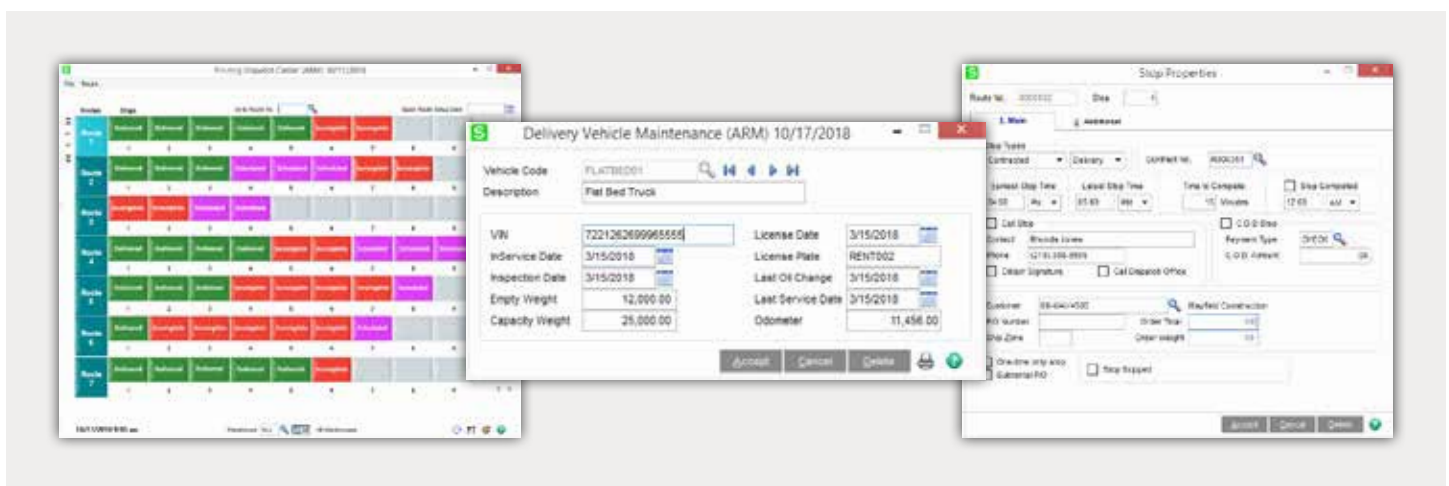
With ARM's integration to Roadnet Anywhere® – efficient routes are created as orders come in and route details can be viewed with a single click from the customer's contract in ARM.

Roadnet Anywhere to create the route. As a SaaS platform, Roadnet Anywhere can be accessed from any contract or delivery screen with a dedicated icon that opens the relevant route information in your browser so you can provide customers with accurate information for every delivery or service call.

KEY CAPABILITIES

- Create repeating service routes by assigning cycle codes that specify service intervals that automatically get added to the delivery schedule.
- Manage detailed information about drive and vehicles including driver's license number, emergency contact info, license plate number, VIN, date of last oil change, inspections and more.
- Reduce data entry by designating contract and non-contract stops. ARM automatically includes the customer name, address, PO number, order total, COD amount, etc. in the routing info.
- Improve driver safety with total route weight and the maximum carry weight automatically calculated for each route

based on inventory information.
- Efficiently edit routes by inserting, moving or deleting stops without scrapping the entire route.
- Read-only access to the routing schedule is available to anyone so they can provide customers with timely updates about delivery status or notify them of delays.
- Plan routes days in advance by assigning dates, making it easy to schedule future routes.
- Create routes for all locations or individually if you deliver from multiple locations.

"We knew if we could implement route optimization software, we could drive down the cost and time by helping our drivers to deliver the route faster and more efficiently." — **LKQ Corporation**

Equipment Maintenance

Being able to view details about specific equipment is critical to ensuring it is available to rent. ARM takes the guesswork out of tracking the life cycle of your serialized and non-serialized equipment by helping you stay ahead of needed preventative maintenance, track over utilized equipment, and keep the fleet fresh. Keep track of vital information and historic details such as the date purchased or last purchased for non-serialized items, the price paid, model number, weight, license number, manufacturer and service schedule. ARM also tells you of the number of units or times rented/sold for any time period as well as the cumulative revenue and costs so that you can replace equipment before it becomes unprofitable.
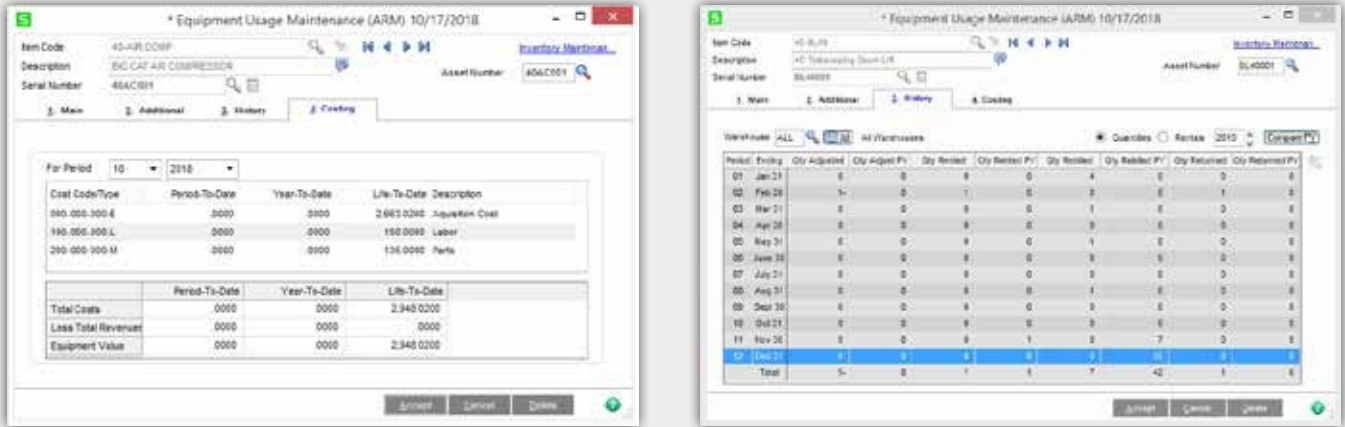
EQUIPMENT STATUS
Equipment status is reflected throughout the system so that it can be relieved from your inventory as needed. You can also easily drill down to view complete details of any open contracts or invoices referencing this item directly from the status screen.

EQUIPMENT MAINTENANCE
View and edit information about your mechanized equipment and drill-down into all costs to the Work Order level. Maintenance schedule and intervals can be set so that equipment is automatically moved to an On Repair status and removed from your inventory.

EQUIPMENT INFORMATION
Keep track of information such as weight dimensions, and license information to assist with delivery routing. For mechanized items, you can enter starting and current meter readings, plus year-to-date, prior-year, and cumulative hours or miles.

Turn information into insight by looking at total revenue generated compared to lifetime costs associated with maintaining each piece of equipment.

Cash Management

ARM delivers a complete, PCI-Compliant Point-of-Rental and Point-of-Sale solution with the ability to process cash reconciliation for multiple cash drawers, credit card terminals, or web portals for separate approval processes.

In addition to contract deposits and payments, cash payouts are easily accounted for. Reps can accept multiple deposits along with the date, receipt type (e.g. cash, check, credit card), and the amount received. The check number, receipt number, and various fields credit cards are recorded and ARM automatically creates cash receipts for payments and deposits associated with Contracts and Invoices entered during the day.

MULTIPLE BANK CODES
Maintain up to 36 bank codes for each company and assign them to each terminal.

MULTIPLE CASH DRAWERS
Set up one or multiple terminals with specific bank codes and GL posting accounts. ARM maintains the date and time the cash drawer was last reconciled and the current balance.

UNLIMITED RECEIPT TYPES
Indicate payment methods you receive including the asset account, if the drawer should open, if it should be included in the bank deposit, and more

CASH PAID OUT
ARM tracks expense types (gas, travel, etc.) and the GL account where they will post.

EDIT DEPOSITS
If necessary, you may edit deposit information recorded on a contract during reconciliation.

ACCOUNTS RECEIVABLE
After cash drawer reconciliation the reconciliation register is printed and updated, creating Cash Receipts Entries in AR.

CALCULATE CHANGE
Overages are calculated and users are prompted users if should be returned.

REFUND BY CHECK
When processing a Return Invoice, a Reconciliation Register report indicates the deposit checks due to be returned.

"It feels like we have eliminated half our workload since there is no duplication. We know in an instant what equipment is in, where it is, who should be billed, who has been billed, who has paid, and who hasn't paid."

M6 Concrete Accessories

Alerts & Workflow Automation

Alerts & Workflow functions as a silent employee that never calls in sick or gets tired and provides information as often as you need it. Set up powerful, automated workflows or business alerts using a simple, visual interface. ARM's business activity monitoring and workflow automation function let's you focus on the business and spend less time on repetitive tasks.

With ARM you can track customer balances to prevent them from becoming problem customers, prevent stock-outs or shortages, notify people when equipment needs to be picked up, create reports about what needs to be serviced or what has never been serviced, and much more.

WORKFLOW AUTOMATION

Automate business processes with customizable workflows to streamline and automate repetitive tasks. When a client becomes overdue, automatically put them on credit hold; when stock runs low, auto-create a purchase order. And notify inventory managers of delinquent returns or when preventative maintenance is scheduled. Move data between applications; and create custom integrations that turn resource-intensive manual processes into automated business activities.

BUSINESS ALERTS

Keep people informed by sending alerts when business conditions are met, such as overdue invoices, critical issues, or contracts about to expire. Deliver alerts to employees, customers, and suppliers via email, text message, dashboard, instant message or even fax.

REPORT CREATION

Automatically generate and distribute reports, documents and relevant forms to the people who need them. Workflows can be configured to send invoices to customers, purchase orders to suppliers, and analytical reports to managers. Configure reports to run based on a recurring schedule in any format of configure other them to run when the business conditions are met.

"The system kicks out exactly what we want and everyone's eyes light up. From a managerial standpoint, ARM is exactly what we needed."

ACTION EQUIPMENT & SCAFFOLD

ARM

AUTOMATED RENTAL MANAGEMENT