InTempo

ENTERPRISE USER CONFERENCE

APRIL 2024





Welcome to the InTempo Connect 2024 Enterprise User Conference!

We're so glad that you're joining us here in St. Louis – not just because we have a great lineup of sessions this year (*and we do)* – but because our vibrant community is part of what makes us all stronger. Getting 100 professionals all in the same room to share strategies and success stories keeps us all focused on continual improvement. That's how we all grow, ***together.***

When we last came together, you said you wanted more innovative tools. We heard you – and we're excited to introduce you to several new products that will help you bring your own business into a newer, more efficient, and more forward-thinking era. There's Connected Transport, the first AI-driven dispatching system for the rental market; Connected Assets, the next generation of telematics for solving real-world business challenges; and Reporter 5, a more powerful solution for getting the right data to the right people at the right time. You'll hear about these solutions quite a bit over the next few days, but we invite you to stop by our expo during breakfast on Tuesday and Wednesday to see them firsthand.

We also hope you'll join our "tips and tricks" sessions to help you use your existing rental software more efficiently. You have an incredibly powerful system at your fingertips; we hope you discover several additional ways to use it to its fullest capacity. You'll find several worksheets and guides throughout the rest of this binder that you can work through with your team back home.

Last but not least, we'd like to extend a sincere thank you to our partners: SmartEquip, Rouse, LHP, Meridian Group, Entrinsik, and Wise Systems. These partners are true leaders in the industry, and we can't do what *we* do without them. We hope you'll take the time to explore their solutions as part of your connected strategy.

If there's anything we can do to help you make the most of this event, don't hesitate to ask. (Heads up: you can easily spot the InTempo team in blue lanyards and partners in green.) Thank you again for being a valued part of the InTempo community, and we look forward to seeing what this week has in store.



Matt Hopp, General Manager

SmartEquip ROUSE LHP Telematics

entrinsik wise systems meridian group INTERNATIONAL

Session	Date & Time	Venue	Page
Reporter 5 Workshop (Morning Session)	4/8/2024 10:00 AM	Cardinals Ballroom C	4
Reporter 5 Workshop (Afternoon Session)	4/8/2024 1:00 PM	Cardinals Ballroom C	5
Welcome Reception	4/8/2024 5:00 PM	2nd Level Terrace	
Breakfast + Demos	4/9/2024 8:00 AM	Cardinals B	
We've All Been Busy: Discover InTempo's Newest Features	4/9/2024 9:00 AM	Cardinals Ballroom C	7
Actionable Strategies & Best Practices for Your Operations Team	4/9/2024 10:00 AM	Home Plate	10
Actionable Strategies & Best Practices for Your Accounting Team	4/9/2024 10:00 AM	Stadium	18
Getting from "Down" to "Rent-Ready" More Quickly: Best Practices for Work Orders and Service	4/9/2024 11:00 AM	Home Plate	28
Streamline Your Financials: Real-World Tips for Better Reconciliation and Reporting	4/9/2024 11:00 AM	Stadium	40
Lunch & Learn with the ARA	4/9/2024 12:00 PM	Cardinals B	42
Strategic Outsourcing: Should You Consider Shared Services for Accounting and Administration?	4/9/2024 1:00 PM	Home Plate	
Optimizing Pricing, Procurement, and Fleet Management with SmartEquip and Rouse	4/9/2024 1:00 PM	Stadium	54
Best Practices for Accurate Inventory Tracking	4/9/2024 2:00 PM	Home Plate	57
Simplifying Customer Taxes and Ancillary Fees	4/9/2024 2:00 PM	Stadium	73
Getting the Right Data to the Right People at the Right Time with Reporter 5	4/9/2024 3:00 PM	Cardinals Ballroom C	76
Laying the Foundation for Your Reporter 5 Migration	4/9/2024 4:00 PM	Home Plate	80
What's New in Payments?	4/9/2024 4:00 PM	Stadium	83
Customer Appreciation Event	4/9/2024 6:00 PM	Top Notch Axe Throwing	
Breakfast + Demos	4/10/2024 8:00 AM	Cardinals B	
Building Our Way to a More Connected Future	4/10/2024 9:00 AM	Cardinals Ballroom C	87
Actionable Strategies & Best Practices for Your Operations Team	4/10/2024 10:00 AM	Stadium	10
Streamlining Your Approach to Credit and Rate Management	4/10/2024 10:00 AM	Home Plate	91
InTempo CTX Special Interest Group {INVITE ONLY}	4/10/2024 11:00 AM	Stadium	
Automating Your Way to More Efficient Accounts Payable	4/10/2024 11:00 AM	Home Plate	
Laying the Foundation for Your Reporter 5 Migration	4/10/2024 11:00 AM	Cardinals Ballroom C	80
Less Wasted Time, More Efficient Routes: What AI-Powered Connected Transport Can Do for You	4/10/2024 1:00 PM	Cardinals Ballroom C	92
InTempo MX Hands-On Training	4/10/2024 2:00 PM	Home Plate	97
You Ask, We Answer: Accounting Q&A	4/10/2024 2:00 PM	Stadium	
InTempo MX: Connected Assets Discussion Panel and Customer Spotlight	4/10/2024 3:00 PM	Cardinals Ballroom C	99
(Optional) One on One Meetings with InTempo + Partners	2024-04-11	Cardinals Ballroom C	



Introduction to Reporter 5

Tony Tye:
Product Manager, InTempo Software

Chris Kennedy:
Project Manager, InTempo Software

Guest Speaker
Randall Williams:
Director of Informer Training and Curriculum Development, Entrinsik, Inc.

High-Level Overview 10:00-10:30

- About Reporter 5
- Personalized Home Page (a.k.a. Finding Your Content)
- Datasources
- Queries
- Visuals
- Reports
- Jobs
- Security

Ad Hoc vs Dataset 10:30-11:00

- What is a Dataset?
- Saved Result Sets and Performance
- What is an Ad hoc Query?
- Criteria vs. Filters
- When to use Ad hoc Queries:
  - Data must be live up to the second
  - Purpose-built
  - Few Simple Criteria that use Inputs
  - Very small result sets
- When to use Datasets
  - Data can be minutes, hours, or days old
  - Lots of consumers, multi-purpose
  - Database performance matters
  - Big result sets

Visuals and Dashboards 11:10-12:00

- Creating Visuals
- New Types of Visuals
- Dashboards and other Reports

Lunch 12:00-1:00

Building Queries 1:00-1:55

- Adding Fields
- Adding Criteria
- Flow Steps
- Formatting
- Web Queries

Eclipse Break 1:55-2:15

Building Queries (continued) 2:15-2:45

- Adding Fields
- Adding Criteria
- Flow Steps
- Formatting
- Web Queries

Informer's API 2:55-3:45

- What is an API?
- Getting Data
- Posting Data
- Most common use cases
- Documentation and inspecting

Informer Assistants and Co-Pilot 3:45:4:00

- AI in Informer
- Data Security
- Assistant Preview
- Co-Pilot Preview

TRAINING & CONSULTING

Customized Training

Online Training Series – By Entrinsik University

Onsite Training

Professional Services

Request Training, Consulting, or Be Put on the Migration List - Contact:

Tony Tye, Product Manager, InTempo Software - anthony.tye@intemposoftware.com

Chris Kennedy, Project Manager, InTempo Software - chris.kennedy@intemposoftware.com

Additional Reporter 5 Training Materials:

Administration and System Setup Training Guide:

Advanced Flow Steps and Power Scripts:

Configuring Visuals and Reports Training Guide:

Designing Queries Training Guide:

Interacting With Query Results Training Guide:

Javascript for Calculated Fields Training Guide:

Understanding User Security Training Guide:

Building Partnerships

SmartEquip ROUSE LHP Telematics
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New Team Members

Jennifer Heckel joined InTempo January 2, 2024.

Jennifer lives in Springfield, MO and, prior to joining InTempo, spent more than 10 years with Custom Truck based in Kansas City, MO. She is excited to share her real world experiences with all of our customers.

Arielle Cox joined InTempo March 18, 2024.

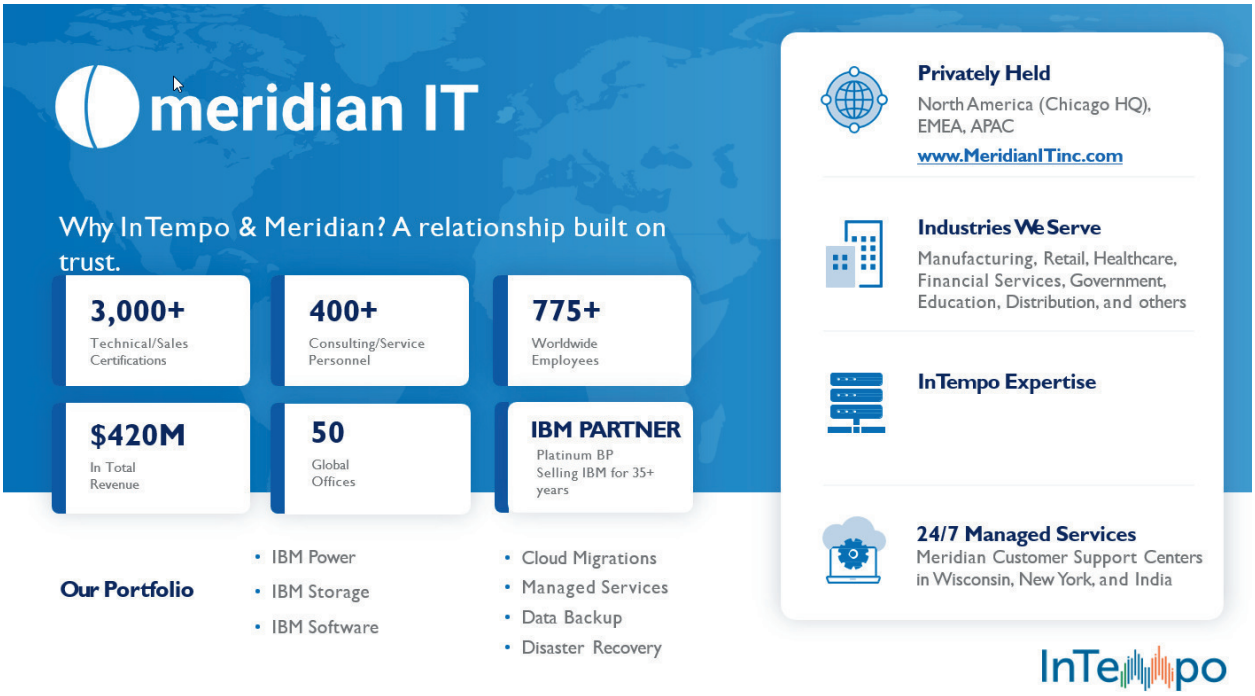
Arielle is from Queen Creek, AZ and is part of our marketing team. While Arielle is new to the rental industry, she is eager to meet our customers and learn more about all that we do.

Becky Huusfeldt joined InTempo March 7, 2024.

Becky is from San Tan, AZ and has more than 21 years of implementation and consulting experience with RentalMan. She also has significant experience in the rental industry as a CFO and as a customer of RentalMan.

We've All Been Busy: Introducing InTempo's Newest Features

The Meridian Relationship





We've All Been Busy: Introducing InTempo's Newest Features

RentalMan System Updates

Curious as to what is coming in the next release. Follow this QR code to link to our quarterly update page.

RentalMan releases are completed on a quarterly basis – in March, June, October, and January.

Each release contains modifications and fixes completed over the prior three to six months.

Actionable Strategies & Best Practices for Your Operations Team



Topics for Session:

- Attributes
- Worksheets
- Equipment Messages
- Equipment Staging
- Contract Pricing
- Equipment Yard Maintenance
- Truck Stock
- A/R 2% Discount through Cash Receipts

Attributes

Attributes are a way to add features to a specific unit that will allow the user to search for when looking up equipment.

For example, if you want to search for all equipment that has a hydraulic kit, you can create an Attribute called Hydraulic Kit, then assign that to a unit, then you can search for all units that have a hydraulic kit, versus having to physically go in the yard and look.

You will need menu option security to these options:

- **Main Menu (M01)**
- **Operations Menu (A51)**
- **Attributes Master File Maintenance (B30)**
- **Equipment Attributes (B31)**

Download a Step-by-Step Guide to Setting Up Attributes:

Worksheets

Worksheets are a way to group like items. This is extremely handy when creating a reservation or rental contract and you need to add a bunch of items all at one time.

For example, if you setup a Worksheet titled "SCAFFOLD", then then the user can search by this Worksheet name and see and select all the appropriate components for a scaffold rental versus selecting each line individually.

You will need menu option security to these options:

- **Main Menu (M01)**
- **Operations Menu (A51)**
- **Worksheet Maintenance (B21)**

Download a Step-By-Step Guide to Setting Up Worksheets:

Equipment Message

Equipment Message are a way to add messages to a Category/Class, to either print Display on the contract during create rental/reservation, or print underneath the line item on the contract, or both. This is extremely handy when you want to have your rental coordinators remind your customers about this type of equipment.

For example, if you setup an Equipment Message for a trailer, you could create a message indicating that "All tire damage is the customer responsibility", which would appear when the user is creating the contract and would print underneath the line item for that specific equipment.

You will need menu option security to these options:

- **Main Menu (M01) and (M09)**
- **Cross Application Menu (C04)**
- **Operations Menu (A51)**
- **Equipment Message Maintenace (B15)**

Download a Step-By-Step Guide to Setting Up Equipment Messages:

Equipment Staging

Equipment Staging is a way to view all upcoming reservations that need to have units assigned.

For example, if you have a reservation for a 3" water pump, this menu will list all the items that need to be checked out for this reservation, and then you can assign a unit number to the reservation from this screen. When all units have been assigned to the reservation, you can also convert the reservation to a rental in this screen as well.

You will need menu option security to these options:

- **Main Menu M01,**
- **Operations Menu A01, A12, A19**

Download a Step-By-Step Guide to Setting Up Equipment Staging:

Contract Pricing

Contract Pricing is a way to group pricing for multiple customers, versus having to add customer specific pricing for each individual customer and each individual Cat/Class rate.

For example, if you want to create a Contract Price for all Drywall Contractors, then you can setup special pricing for all the Cat/Classes they would rent, then you can assign all your Drywall Contractors to this Contract Price, and if you change the Contract Price, then you will not have to go in and change all the rates for each customer.

You will need menu option security to these options:

- **Main Menu (M01),**
- **Operations Menu (A51)**
- **Equipment Rental Rate Discount (B17)**
- **Contract Price (B22)**

Download a Step-By-Step Guide to Setting Up Contract Pricing:

Equipment Yard Maintenance

Equipment Yard Maintenance is a way to setup remote "locations", similar to a laydown yard. You could also setup a "Yard" that could be an area in your facility where you store equipment or possibly at a customer site where you stage equipment. You can setup multiple "Yards" for each Location.

You will need menu option security to these options:

- **Main Menu (M01) and (M09)**
- **Operations Menu (A53)**
- **Additional Operations Menu (E32)**
- **Cross Application Menu (C68)**

Download a Step-By-Step Guide to Setting Up Equipment Yard Maintenance:

Truck Stock Maintenance

Truck Stock is a way to stock and track parts on service trucks.

For example, if you keep parts on a service truck, you can then view how many parts are on the various service trucks, so you know which truck to dispatch to a service call.

You will need menu option security to these options:

- **Main Menu M07**
- **Work Order Menu N80,**
- **Additional Work Order Menu W21**

Download a Step-By-Step Guide to Setting Up Truck Stock Maintenance:

Customer Notes

Customer Notes are a way to add a comment to a specific customer that will appear when the user creates, updates, or returns a Rental Contract, Sales Order, Equipment Sale, or Reservation.

For example, if you want to let your rental coordinators know of a special circumstance with a customer.

You will need menu option security to these options:

- **Main Menu (M01)**
- **Charge Customer Inquiry (A33)**

Download a Step-By-Step Guide to Setting Up Customer Notes:

Actionable Strategies & Best Practices for Your Accounting Team



Becky Huusfeldt

21 years as a RentalMan Business Analyst and Implementation Specialist.

Prior to RentalMan, Becky spent the majority of her career as a Controller/CFO, the last of those positions also as a customer of RentalMan.

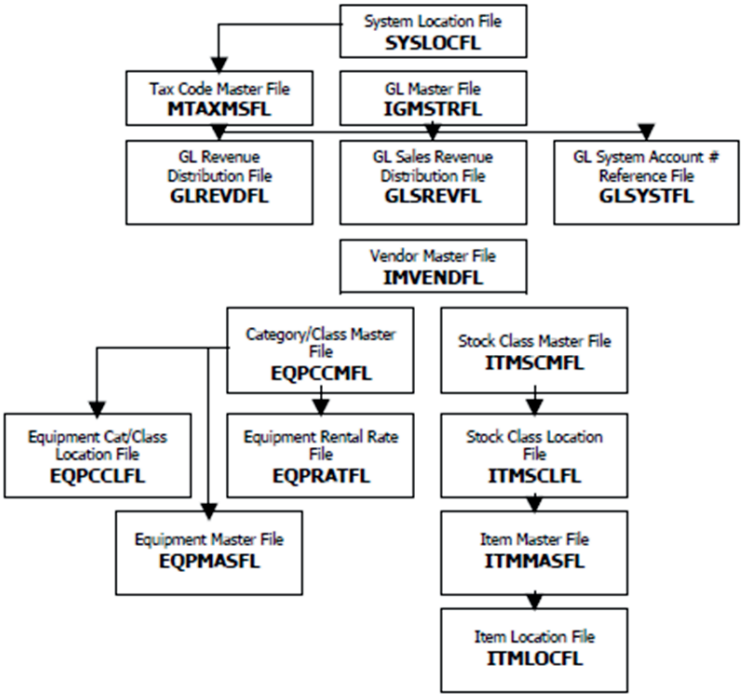
General Ledger

- Use of Journal Codes allows for more reporting flexibility
  - G/L Journal Inquiry (Option 5,42) – G/L Journal File
  - Minimal setup provides ability to default journal codes by application type
  - Changes to journal numbering by journal code

Jrnl Code	Jrnl type	Journal number	Cmp	Loc	account number	Amount	Rcd src
PC1	PY	10	RM	DMO	0010000000044500	107.75	CR
PC1	PY	10	RM	DMO	0012100000001000	107.75-	CR
PC2	PY	336	RM	DMO	0010000000044500	16.85	CR
PC2	PY	336	RM	DMO	0012100000001000	16.85-	CR
DCP	HA	252	RM	DMO	0012410000001000	103.98	AP
DCP	HA	252	RM	DMO	0021200000001000	103.98-	AP
VPW	OD	1	RM	DMO	0010000004044502	103.98-	AP
VPW	OD	1	RM	DMO	0021200000001000	103.98	AP
DCP	HA	250	RM	DMO	0021200000001000	2350.00-	AP
DCP	HA	250	RM	DMO	0052400001001000	2350.00	AP

General Ledger Mappings

- Files that affect mapping:
  - Default System G/L Values
  - G/L Revenue Dist. – Equipment
  - G/L Sales Revenue Dist. – Item
  - A/R Adjustment Codes
  - Intercompany Expense Codes
  - Default Codes



Actionable Strategies & Best Practices for Your Accounting Team

Separation of Duties

- Use of security program access
- Auto post batch controls
- Control records to restrict posting of own batch

Customer Payments

- Use of Parent/Child 'Corp Link' for larger customers
- Lockbox – Upload Excel spreadsheet from your bank & deal only with the exceptions

Vendor Payments

- Process all payments the same way (only print checks)
- Payment Management Files

Web Tools/Web Services

- Time Savings
- A/P Upload
- J/E Upload
- 3rd Party Interfaces



Month End

- Earned Not Billed (ENB)
  - System generated earned revenue accrual
    - Provides accrual/reversal entries
  - Can include DW, EPA, Delivery/Pickup, Misc Charge, and Sales Items in addition to rental revenue
- Depreciation
- Received Not Invoiced (RNI)
  - Replaces Month End A/P Accrual
    - Real-time accruals upon receipt

Key Back Office Takeaways

- Journal codes provide reporting flexibility
- G/L Mappings should be reviewed periodically
- Use of corporate link and lockbox functionality can aid in quicker cash application
- A/P & J/E Upload tools can simplify and automate these processes

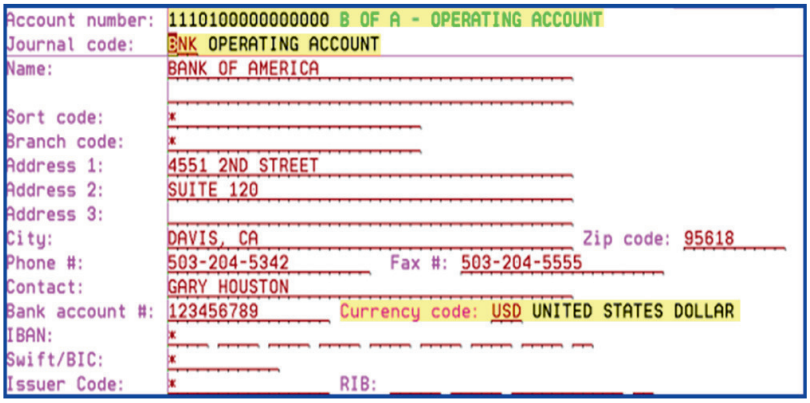
The Theory Behind Bank Control Accounts

The Crux Of It

- Bank G/L Accounts balance to their last bank statements reconciled
- Outstanding payments and deposits reside in Bank Control Accounts until they are marked as reconciled
- No need for bank reconciliations to be performed "outside" the system
- It's all about the G/L (isn't it always?)

Bank Account Master File

- Bank G/L Account
- Journal Code
- Currency Code



Bank Control Account File

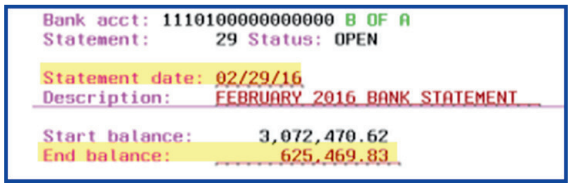
- Customer Payments
  - Accounts Receivable
  - Cash Drawer
  - Vendor Payments



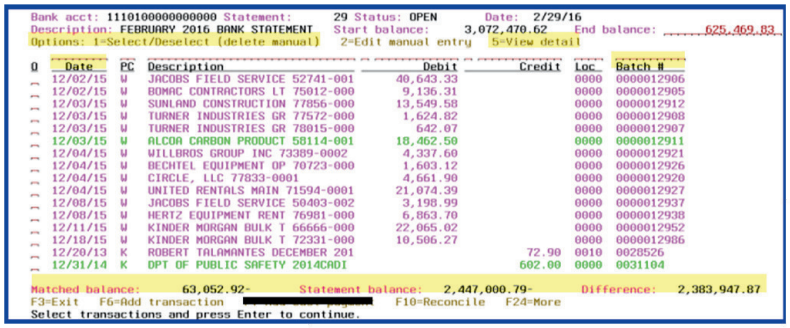
General Tips & Information

- The statement date will always be the journal date when reconciled
- Bank Statements can be reconciled daily, weekly, monthly……your choice
- Customer payments taken both through Accounts Receivable and Cash Drawer are shown “by invoice”
  - The good news is we can filter by batch
- Vendor payments are summarized by the amount of the payment itself regardless whether one or more invoices were paid
  - Invoice detail is readily available if needed

The Bank Rec Itself

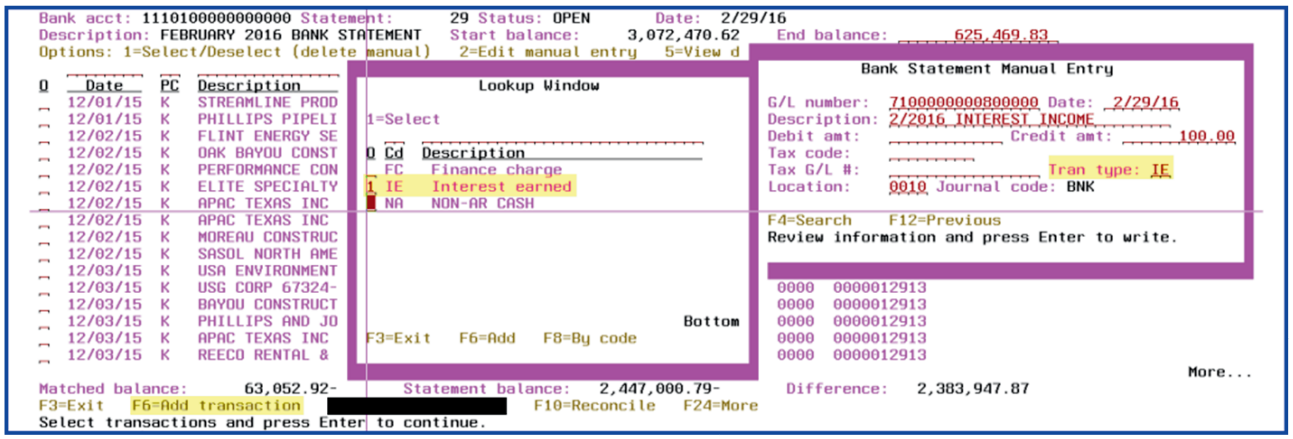


- Select/Enter/That Was Easy
- Color Coding
- Difference Accumulator



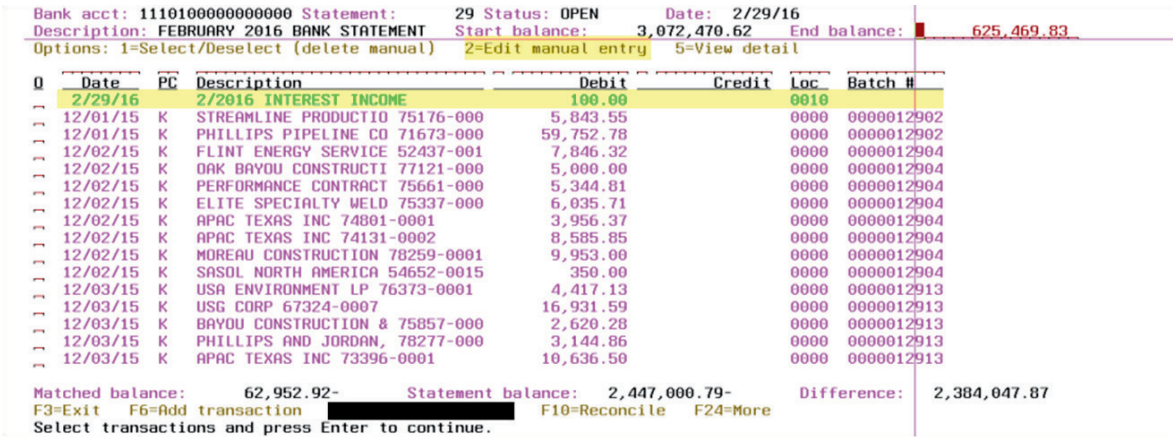
Manual Journal Entries No More

F6 Saves Time



- Applicable bank account activity can be integrated directly within the Bank Reconciliation Module as opposed to requiring a separate journal entry
- This activity can be tagged with user defined labels to aid in analysis and reporting

F6 Output is Accommodating



Bank acct: 1110100000000000 Statement: 29 Status: OPEN Date: 2/29/16
Description: FEBRUARY 2016 BANK STATEMENT Start balance: 3,072,470.62 End balance: 625,469.83
Options: 1=Select/Deselect (delete manual) 2=Edit manual entry 5=View detail

O	Date	PC	Description	Debit	Credit	Loc	Batch #
	2/29/16		2/2016 INTEREST INCOME	100.00		0010	
	12/01/15	K	STREAMLINE PRODUCTIO 75176-000	5,843.55		0000	0000012902
	12/01/15	K	PHILLIPS PIPELINE CO 71673-000	59,752.78		0000	0000012902
	12/02/15	K	FLINT ENERGY SERVICE 52437-001	7,846.32		0000	0000012904
	12/02/15	K	OAK BAYOU CONSTRUCTI 77121-000	5,000.00		0000	0000012904
	12/02/15	K	PERFORMANCE CONTRACT 75661-000	5,344.81		0000	0000012904
	12/02/15	K	ELITE SPECIALTY WELD 75337-000	6,035.71		0000	0000012904
	12/02/15	K	APAC TEXAS INC 74801-0001	3,956.37		0000	0000012904
	12/02/15	K	APAC TEXAS INC 74131-0002	8,585.85		0000	0000012904
	12/02/15	K	MOREAU CONSTRUCTION 78259-0001	9,953.00		0000	0000012904
	12/02/15	K	SASOL NORTH AMERICA 54652-0015	350.00		0000	0000012904
	12/03/15	K	USA ENVIRONMENT LP 76373-0001	4,417.13		0000	0000012913
	12/03/15	K	USG CORP 67324-0007	16,931.59		0000	0000012913
	12/03/15	K	BAYOU CONSTRUCTION & 75857-000	2,620.28		0000	0000012913
	12/03/15	K	PHILLIPS AND JORDAN, 78277-000	3,144.86		0000	0000012913
	12/03/15	K	APAC TEXAS INC 73396-0001	10,636.50		0000	0000012913

Matched balance: 62,952.92- Statement balance: 2,447,000.79- Difference: 2,384,047.87
F3=Exit F6=Add transaction [redacted] F10=Reconcile F24=More
Select transactions and press Enter to continue.

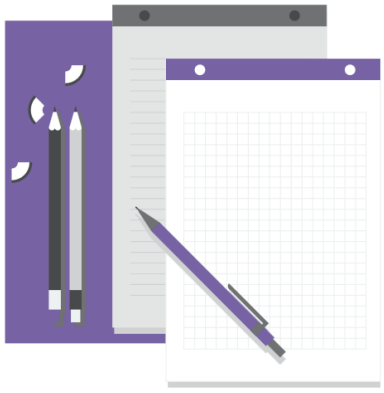
- Amounts come in automatically marked for reconciliation
- Lines can easily be edited
- Deselect will quickly delete the line altogether

The Bank Rec Epilogue

- As lines are marked for reconciliation and items are integrated, the "Difference Accumulator" continues to work toward zero
- Once zero is reached, F10 is used to reconcile the Bank Statement and all journal entries to move amounts from the Bank Control Account(s) to the Bank G/L Account as well as to record any F6 amounts are automatically posted
- F19 allows you to print the Bank Statement in detail or summary before or after reconciliation

Key Takeaways

- Can eliminate spreadsheet bank reconciliations
- Easily implemented from day one or mid-stream
- Thoughts on enhancements



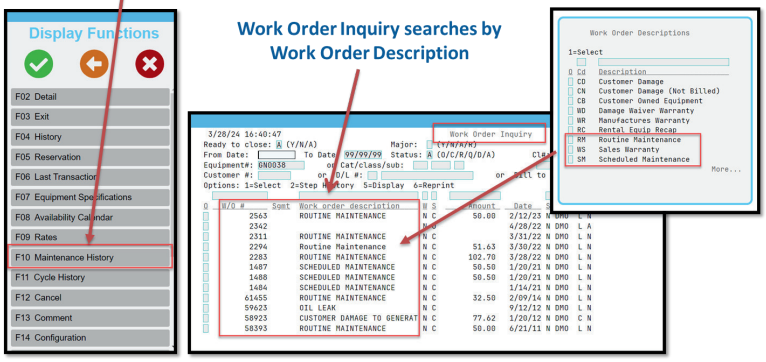
Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service



- Work Order History Search
- Equipment Maintenance Entry
- Warranty Tracking
- Work Order Descriptions
- Labor Codes/Department Codes
- Scheduled Maintenance

Work Order History Search

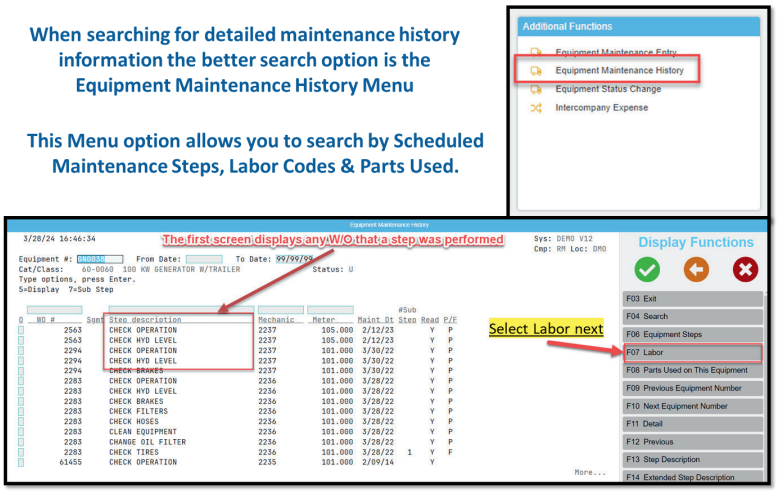
When searching from the equipment detail screen and selecting Maintenance History, the system displays your total Work Order Listing.



Equipment Maintenance History

When searching for detailed maintenance history information the better search option is the Equipment Maintenance History Menu

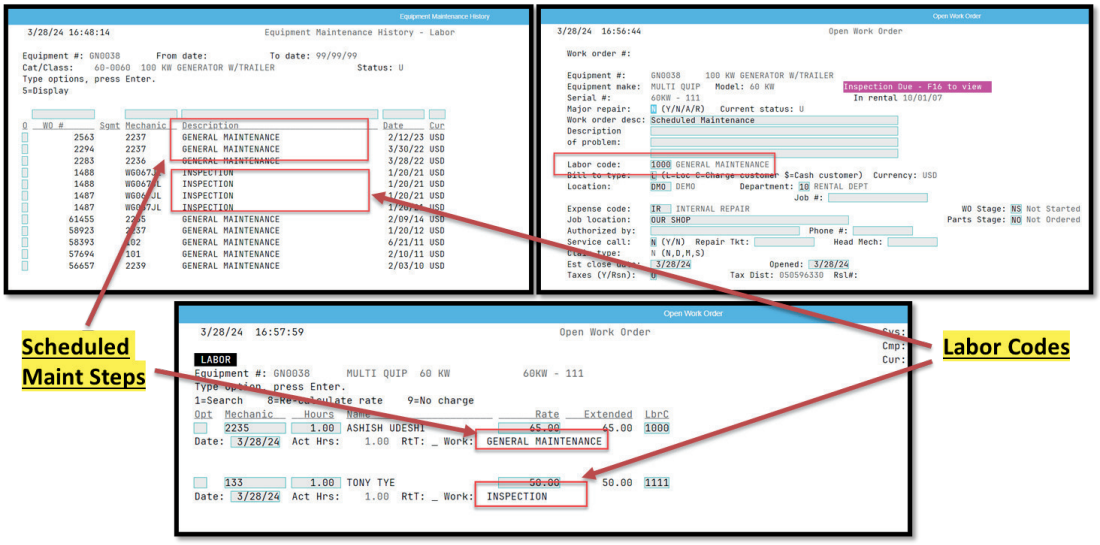
This Menu option allows you to search by Scheduled Maintenance Steps, Labor Codes & Parts Used.



Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

Equipment Maintenance History

When selecting labor, the system searches by work description from the labor screen. If the labor was selected on the step screen, it will show step description. If entered directly in the labor screen, it will show labor code entered.



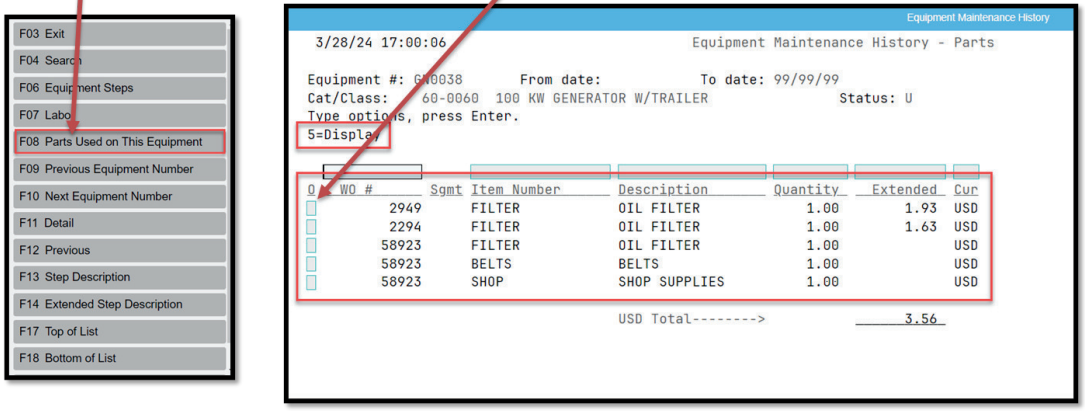
Scheduled Maint Steps

Labor Codes

Equipment Maintenance History

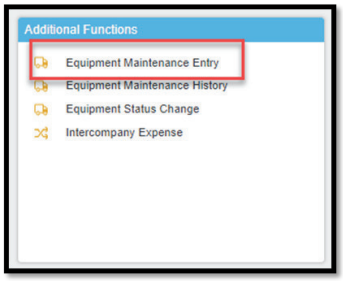
Next Select Parts Used On This Equipment

Selecting this option shows every work order that has parts applied. Selecting Option 5 (Display) will display a work order related to the transaction.

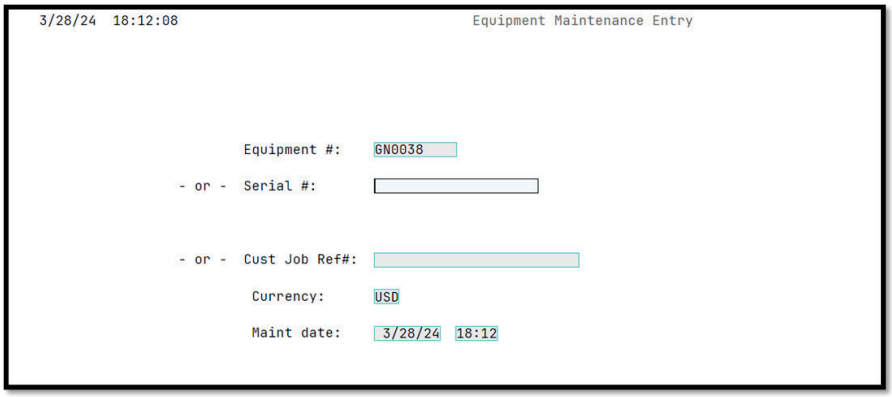


Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

Equipment Maintenance Entry

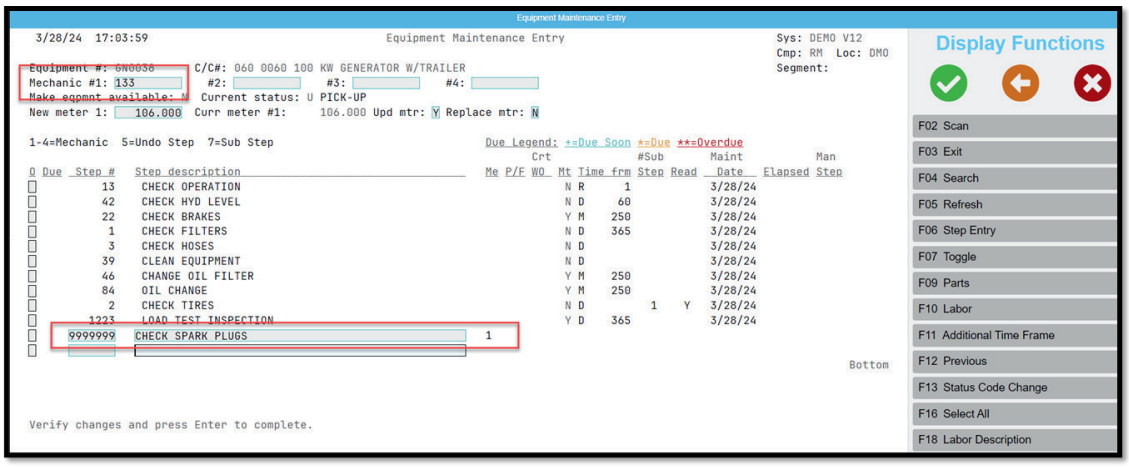


Equipment Maintenance Entry allows for a quicker way to log work done on a unit without opening a work order. All work entered under Equipment Maintenance Entry will be able to be viewed like a normal work order.



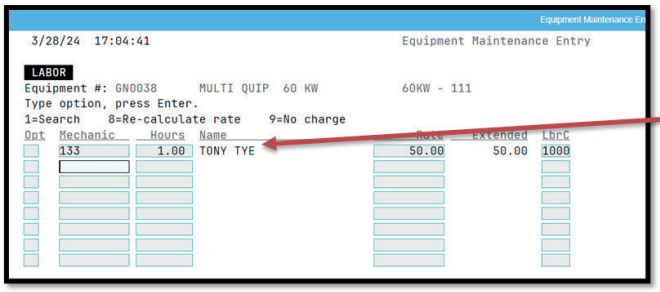
Equipment Maintenance Entry

You can complete a step that is set up for the unit or add a one-time step that has not been set up. The mechanic performing the work will also need to be selected.



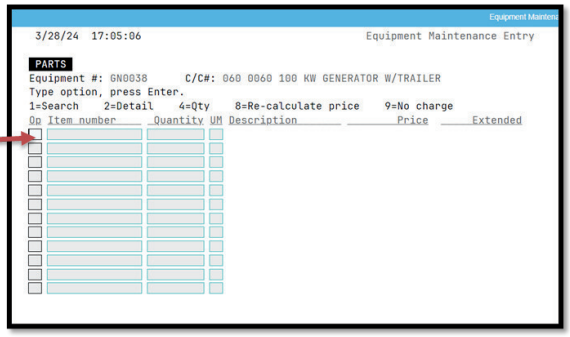
Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

Equipment Maintenance Entry



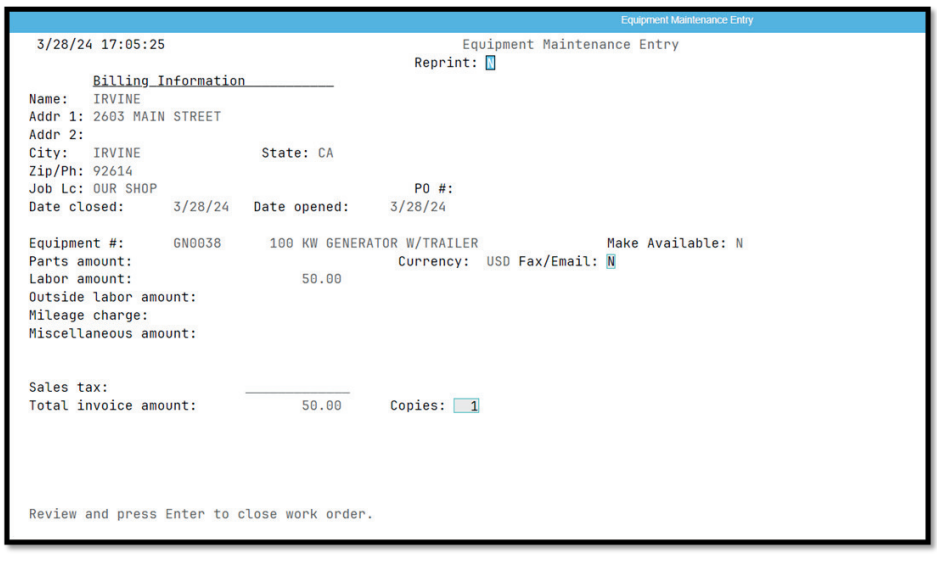
You will need to enter the hours for a mechanic who performed the work.

You can also add any parts that were used.



Equipment Maintenance Entry

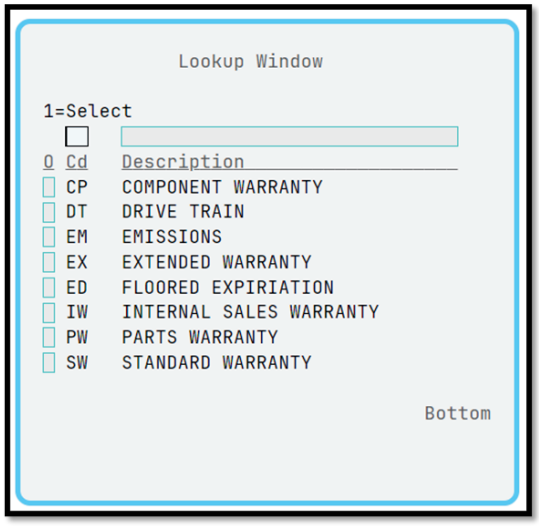
The final review screen will reflect the parts/labor charges for this Equipment Maintenance Entry. Enter through to complete the maintenance entry. This will create a work order that documents the work done and parts used.



Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

Warranty Type Maintenance

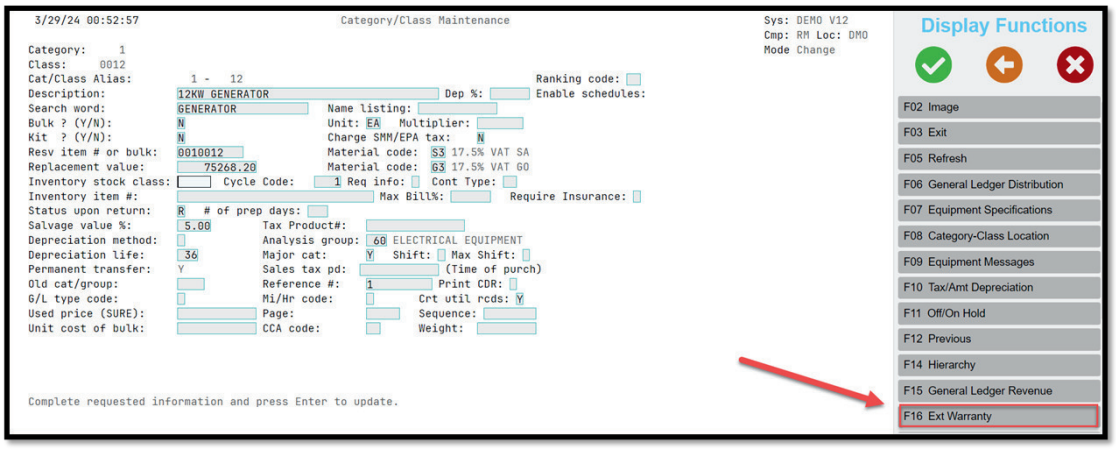
Warranty type maintenance allows you to manage multiple machine warranties and expiration dates.



As a user-defined code, you can add as many warranty types as you need.

Warranty Type Maintenance

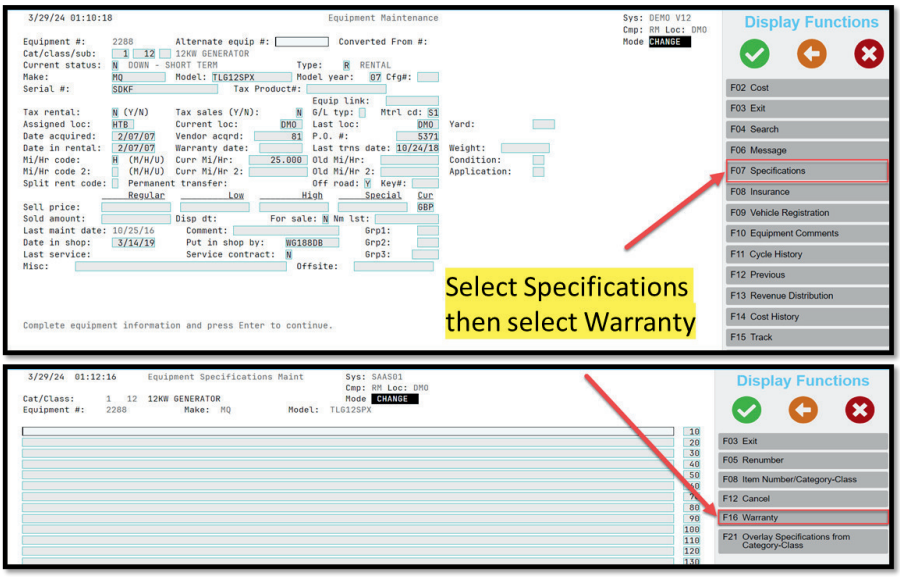
Warranty types can be added at the Cat-Class level to be available by default to the individual unit numbers.



Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

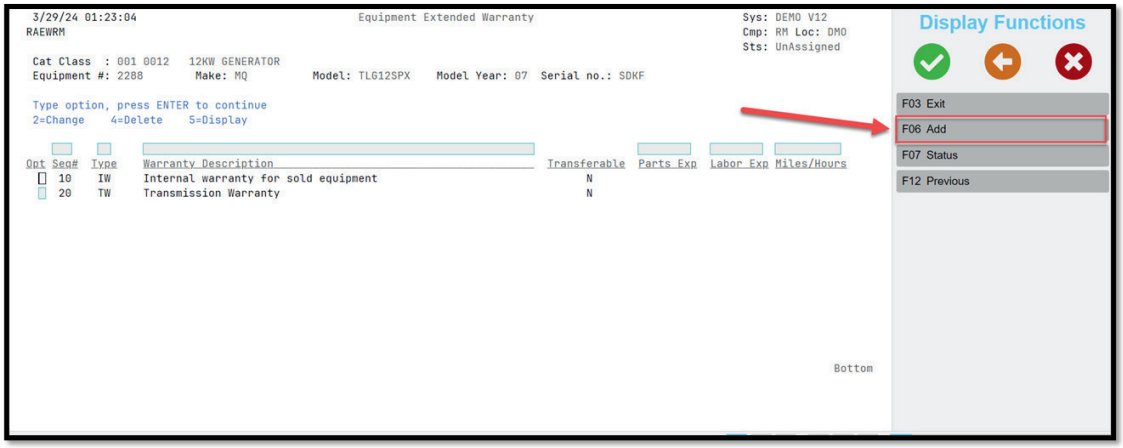
Warranty Type Maintenance

When accessing the Equipment Master File, you can see the applicable warranties as seen below.



Warranty Type Maintenance

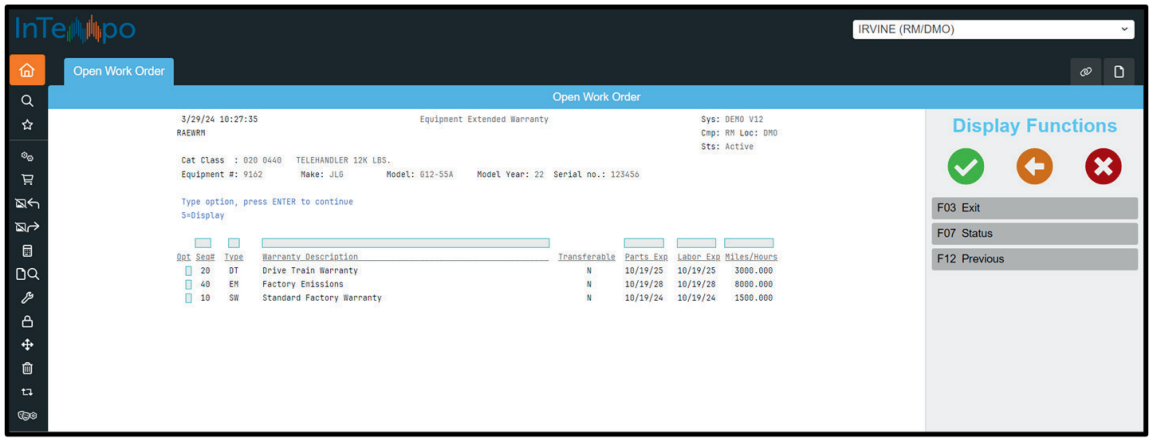
Once displayed you can see the expiration dates, hours/miles, and transferable status for the unit number selected.



Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

Warranty Type Maintenance

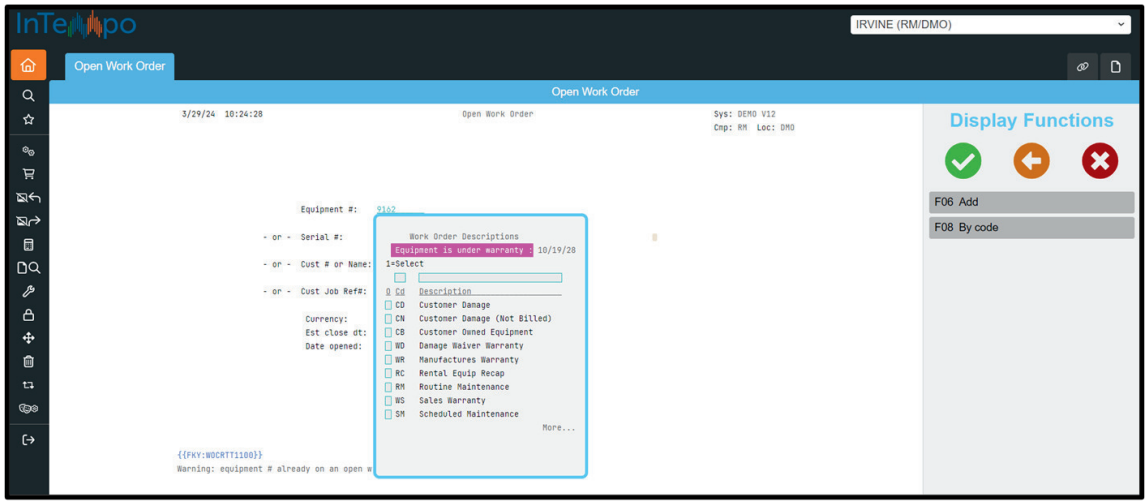
Warranty-type maintenance allows you to manage multiple machine warranties and expiration dates.



Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

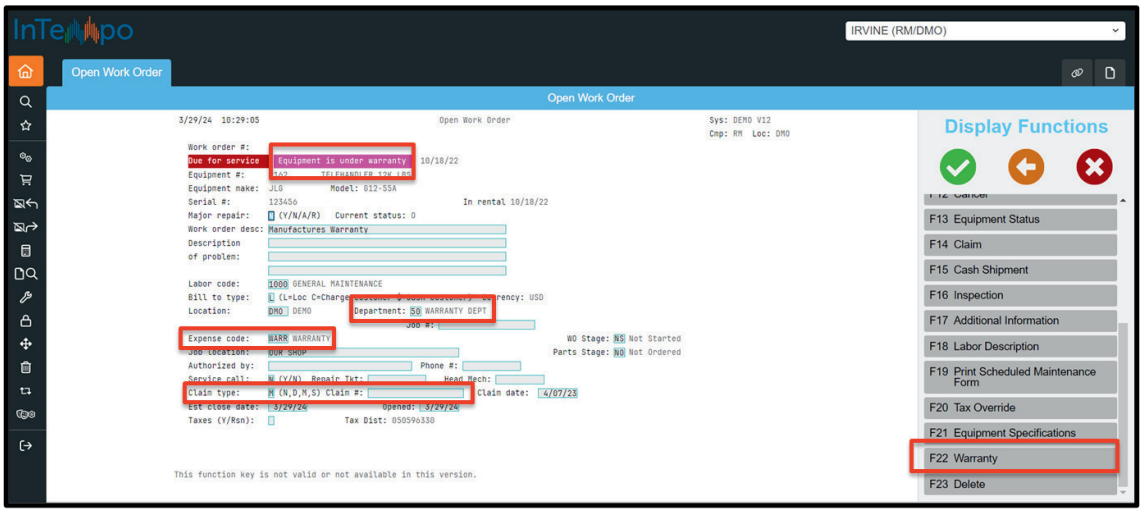
Warranty Type Maintenance

Once the warranties have been identified and assigned to a specific unit, the work order process works as follows.



Warranty Type Maintenance

If everything is set up in your work order processing environment. Everything will default for your user, and they can change required based on user authority.



Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

Warranty Claim Maintenance

Warranty Claim Maintenance will be called when the work order is created.

You then have a choice to auto-assign the claim number or enter your own.

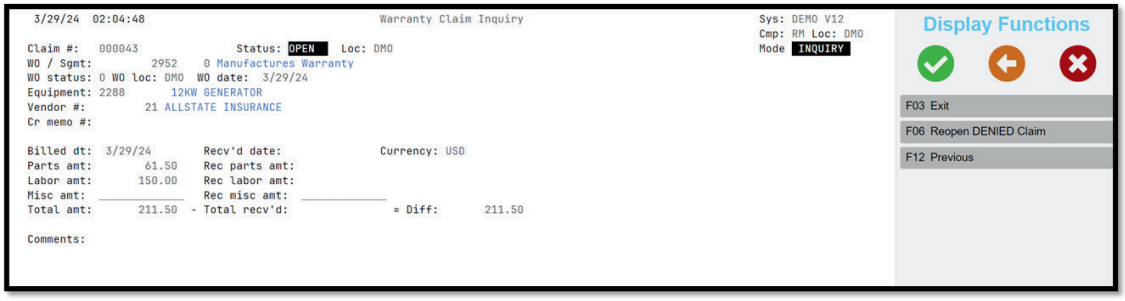


Assign the claim number, then advance to the claim review screen with the work items auto-populated.



Warranty Claim Maintenance can be a valuable tool in tracking in detail what you are recovering on your warranty claims.





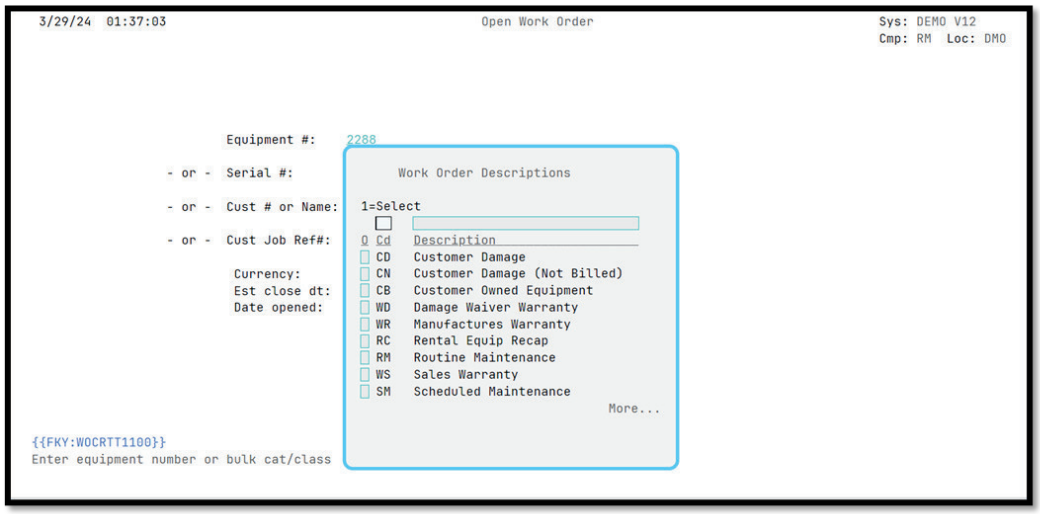
Warranty claim maintenance can be used for internal rental fleet claims and at the dealer level for customers claims also. Let us help set your system up to get the most out of your warranty dollars!

Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

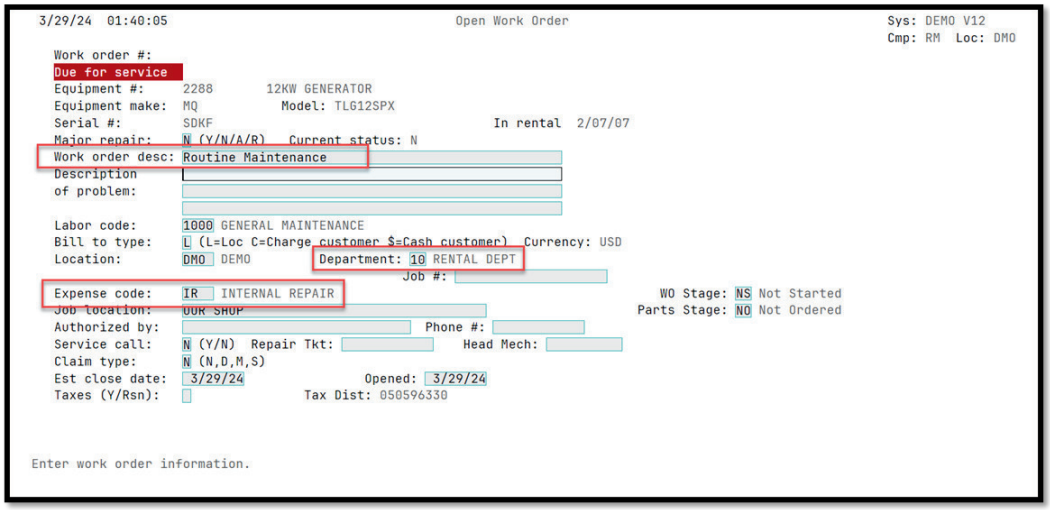
Work Order Descriptions

Standardized Work Order Descriptions are the key to effective financial management and analysis of your fleet.

Prompting the selection of your Work Order Descriptions at the beginning of creating a work order is the best way to establish consistent reporting.



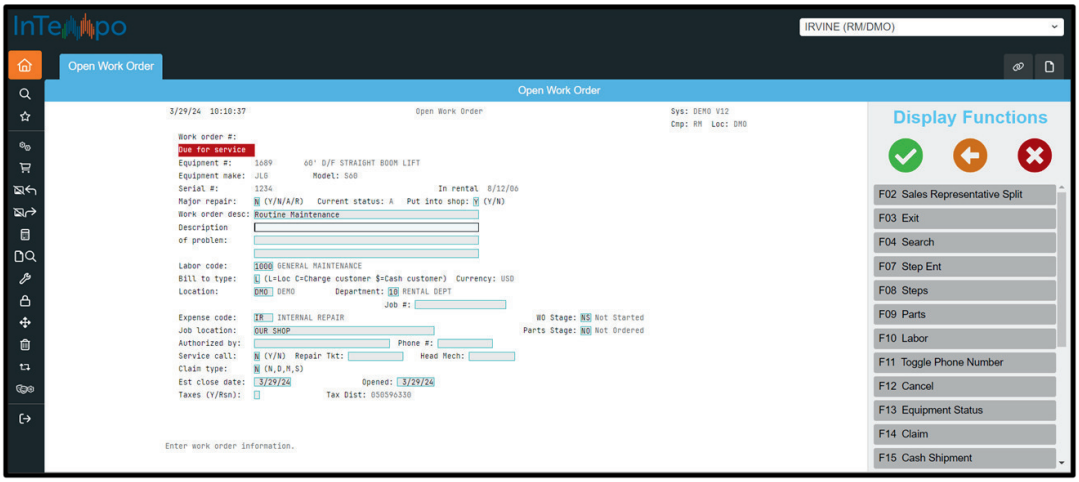
The Work Order Description selected auto-populates the expense and department codes with the predetermined codes that are accurate for the work being performed.



Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

Labor Codes

A well thought out labor code set up gives you limitless analysis ability from searching work orders by labor detail to detailed time tracking as detailed as you want.

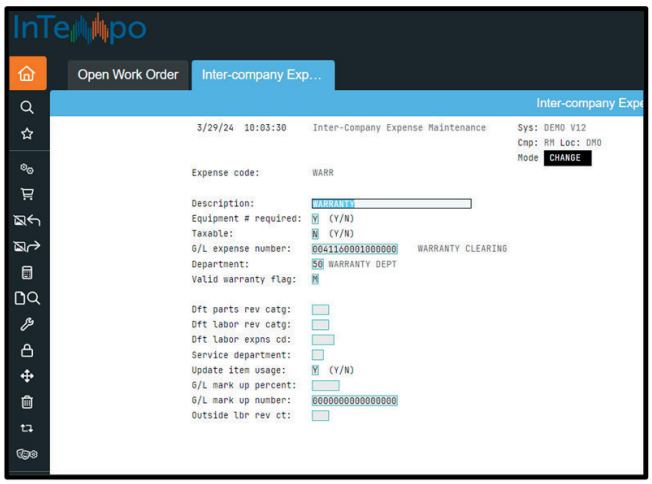


Correctly set up, you can see exactly where your maintenance labor $ is being spent!

Expense Codes

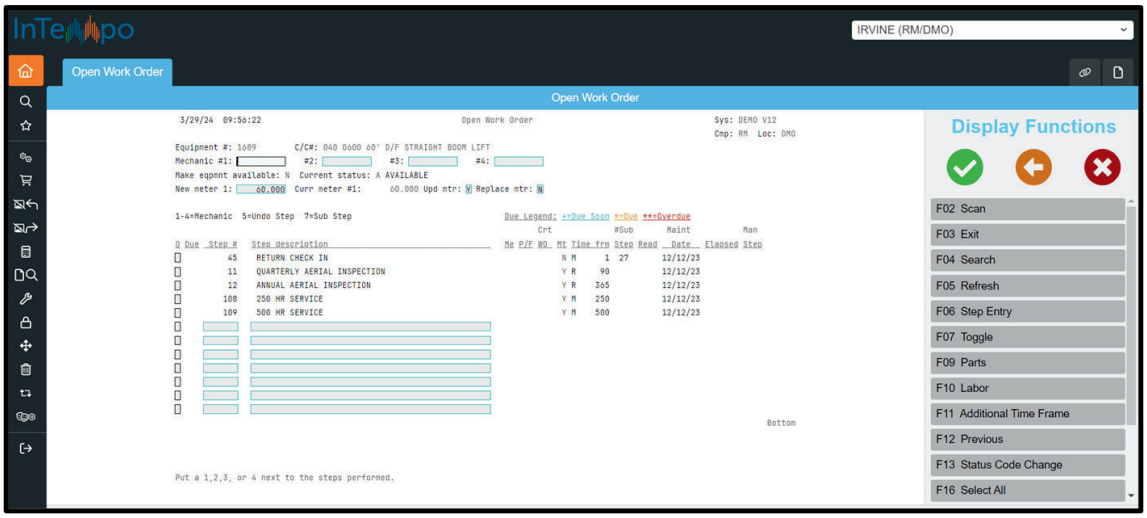
Expense codes are a powerful tool for managing your fleet’s expenses in as much detail as you choose.

Also, any inter-company expenses are broken out so that you can see exactly where your money is going.



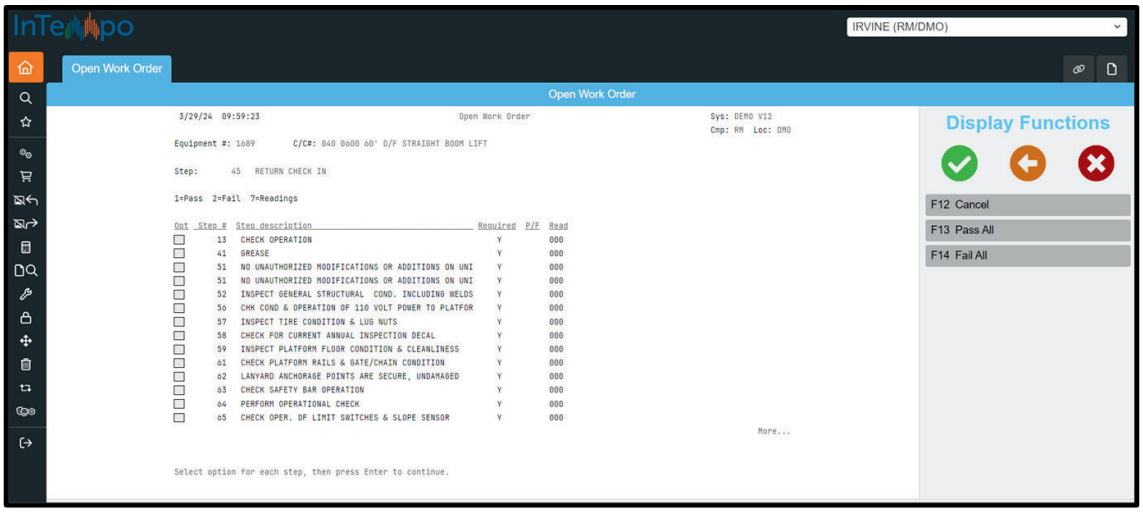
Getting from “Down” to “Rent-Ready” More Quickly: Best Practices for Work Orders and Service

Scheduled Maintenance Items



Scheduled maintenance items need to be correctly set up for standardization and consistent documentation.

Scheduled Maintenance Items Sub-Steps



With the addition of sub-steps, you can more thoroughly and efficiently document the who, what, and when of your scheduled items.

Streamline Your Financials: Real-World Tips for Better Reconciliation and Reporting



Becky Huusfeldt

21 years as a RentalMan Business Analyst and Implementation Specialist.

Prior to RentalMan, Becky spent the majority of her career as a Controller/CFO, the last of those positions also as a customer of RentalMan.

Reconciliation Best Practices

- Subledgers from Reporter
  - A/R Aging
  - A/P Aging
  - Inventory
  - Fixed Assets
  - Etc
- Trial Balance and G/L Detail from Reporter
- Delivered to users automatically

Financial Reporting Best Practices

- Reporter Trial Balance
- Various Financials
  - RentalMan
  - Reporter
  - Export

COOKIE & COFFEE CREATIONS INC.
Balance Sheet
October 31, 2019

Assets			
Current assets			
Cash		$86,219	
Accounts receivable		3,250	
Inventory		17,897	
Prepaid expenses		6,300	$113,666
Property, plant, and equipment			
Furniture and fixtures	$12,500		
Accumulated depreciation—furniture and fixtures	(1,250)	11,250	
Computer equipment	4,200		
Accumulated depreciation—computer equipment	(600)	3,600	
Kitchen equipment	29,000		
Accumulated depreciation—kitchen equipment	(2,050)	26,950	41,800
Total assets			$155,466
Liabilities and Stockholders' Equity			
Current liabilities			
Accounts payable		$5,848	
Income tax payable		19,690	
Dividends payable		700	
Salaries and wages payable		2,250	
Interest payable		188	
Note payable—current portion		4,000	$32,676
Long-term liabilities			
Note payable—long-term portion			6,000
Total liabilities			38,676
Stockholders' equity			

Financial Statement Sources

Source/Path	Benefits	Requirements
RentalMan	• Realtime data • Print on demand	• Requires config • Maintenance of changes
Reporter 4 Reporter URL	• Exportable • Schedule/distribute • Live Excel Connection • Template Reports	• Expense if outsourced • Upgrade to 5 • Learning curve • Excel skills
Reporter 5 Reporter URL	• Exportable • Schedule/distribute • Live Excel connection • API Connections • Template Reports	• Expense if outsourced • Learning curve • Excel skills
Live Excel Connection	• Trial Balance • On demand refresh • Flexible	• Advanced Excel skills

ARA Highlights & Rental Industry Insights

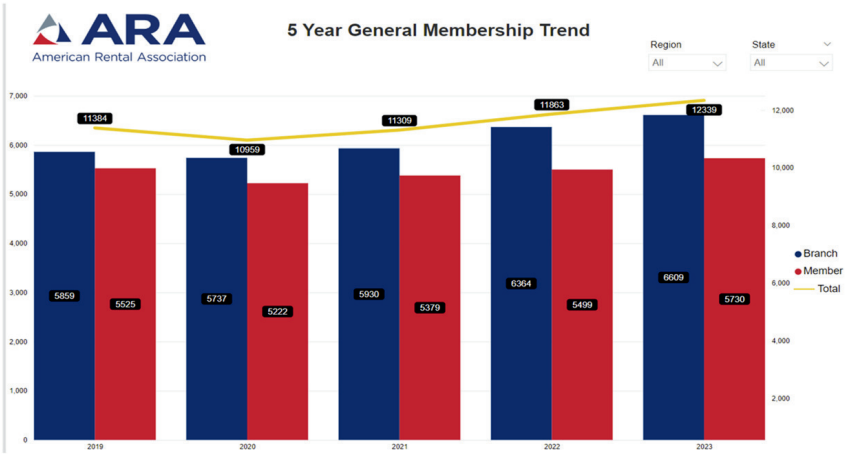


Tom Doyle

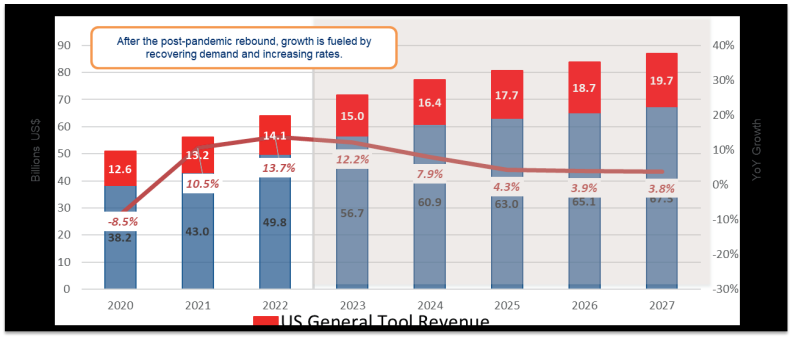
ARA Vice President, Program Development

Spent past 5 years with ARA serving the rental industry and our members. Long history in construction equipment and the equipment rental market. Managed the rental operations with Deere Construction for 15 years, growing the business by surpassing the needs of customers. Passionate about the industry and people in it.

When not working, you can find me doing some sport. Love being husband, father, grandfather



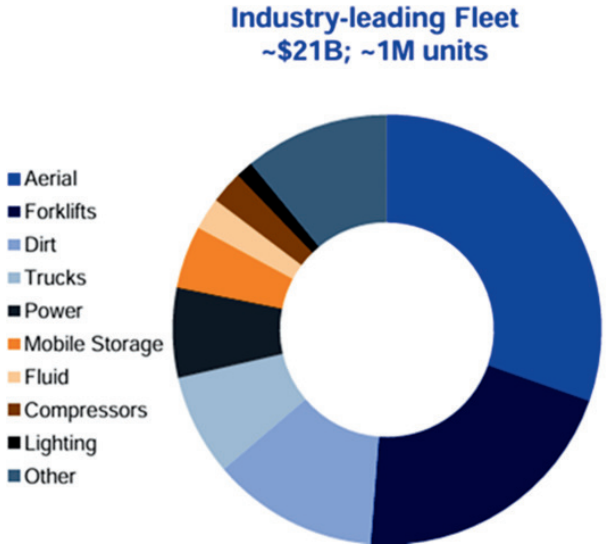
Total US Equipment Rental Revenue



Data compiled January 2024.
Source: S&P Global Market Intelligence.

ARA Highlights & Rental Industry Insights

A Look Behind the Numbers:





Trench Safety

- Excavation support solutions, confined space entry equipment, and customer training
- Used for construction, utility installs, manhole work, and other underground applications



Portable Storage & Modular Space

- Portable storage, mobile offices, and modular space solutions
- Core rental item used across all types of industrial and construction sites, commercial applications, and many other end-markets



Power & HVAC

- Complete solutions for mobile power and air flow
- Used for disaster response, plant shutdowns, commercial renovations, and seasonal climate control



Fluid Solutions

- Full range of equipment to contain, transfer, and treat fluids
- Used by municipalities, industrial plants, and mining, construction, and agri-business customers



Onsite Services

- Plastic bathroom facilities, luxury restroom trailers, sinks, and showers
- Core rental item used across all types of special events, construction sites, and industrial projects

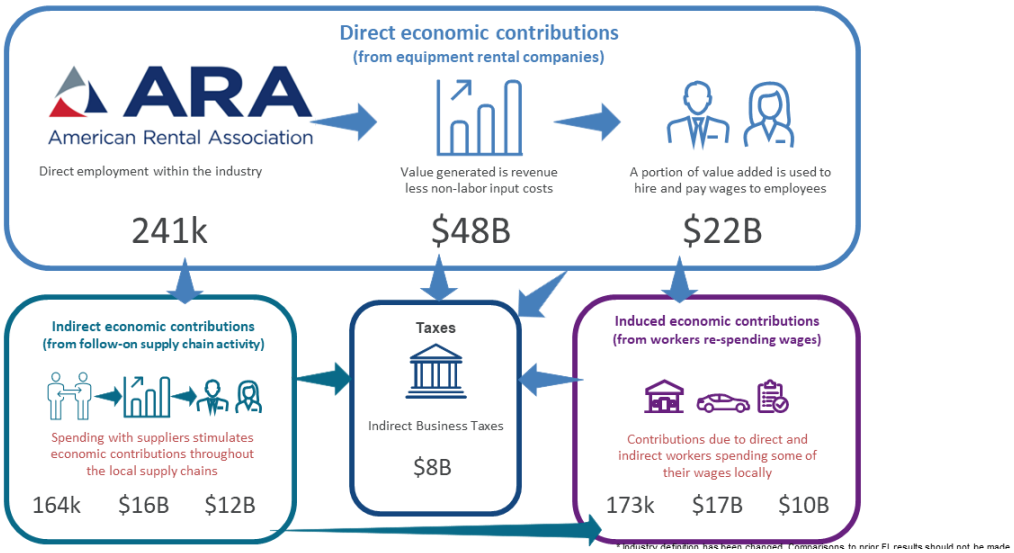


Tool Solutions

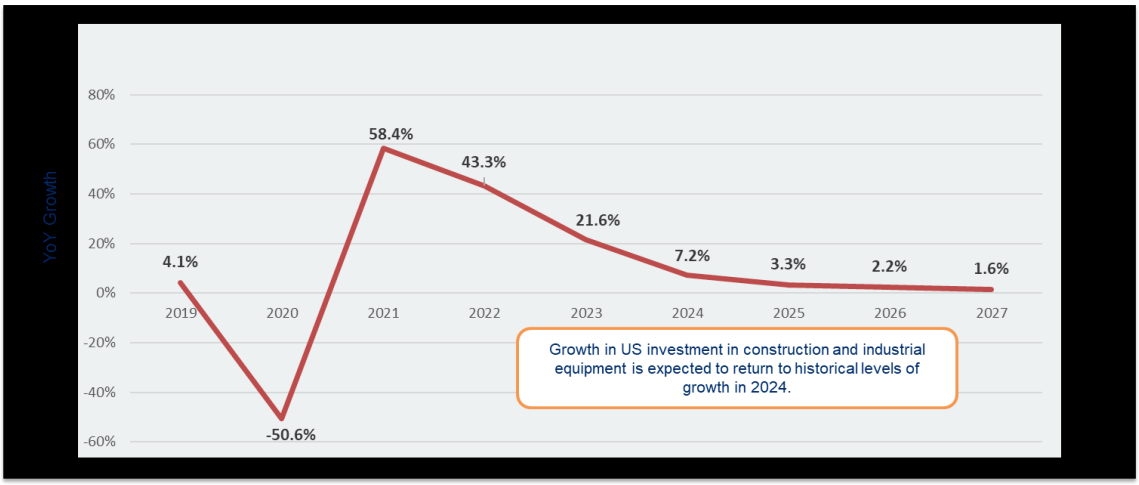
- Tool trailers stocked with hosting, torquing, pipe fitting, and air tools
- Used for refinery and other industrial needs and at large construction sites

An economic impact study three levels of industry impact

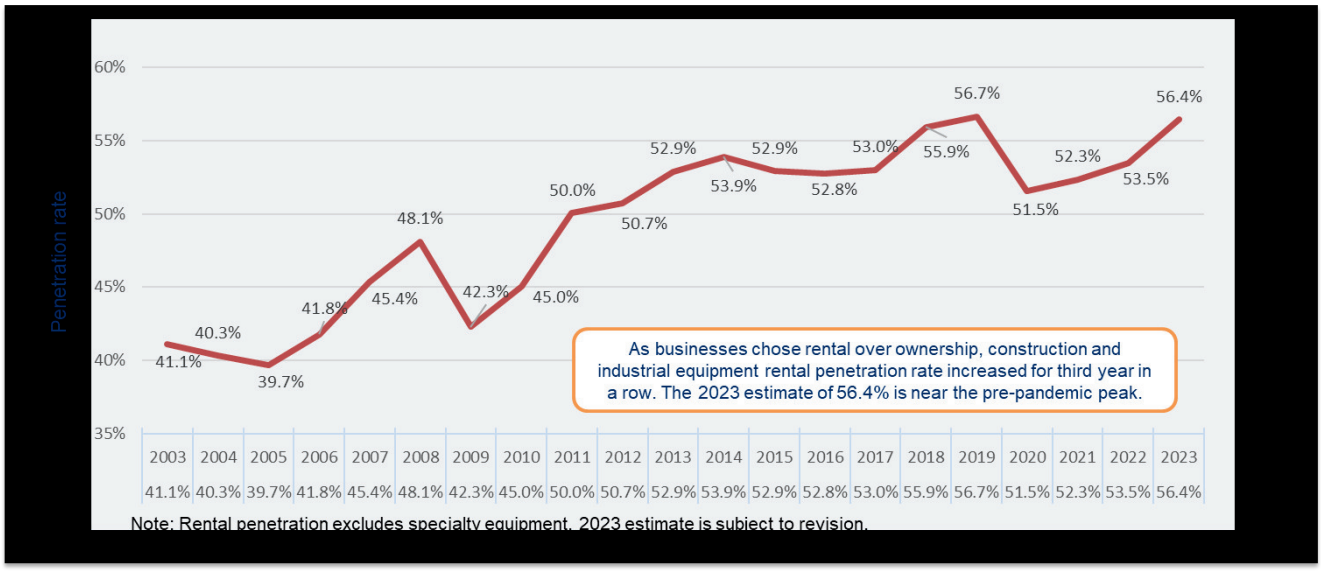
Industry revenue of $71.7B in 2023 generates far reaching impacts



US Construction & Industrial Equipment Rental Investment Growth



US Construction & Industrial Equip Rental Penetration



Data compiled January 2024.
Source: S&P Global Market Intelligence.

Industry Segmentation:

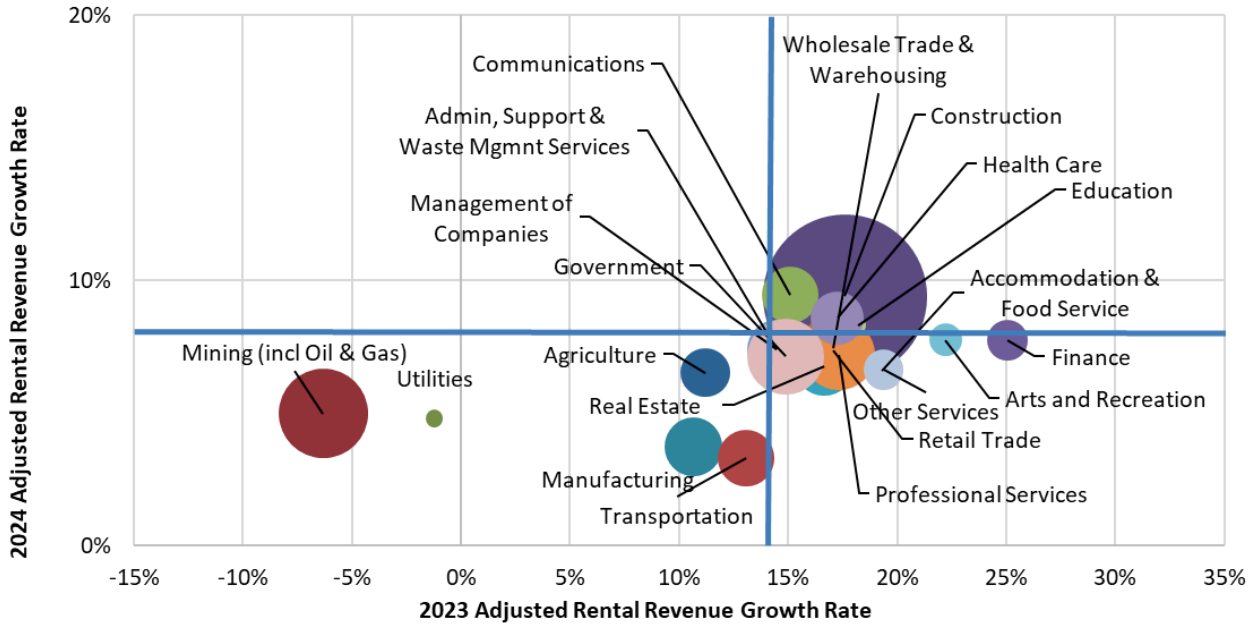
Background and Approach

- S&P Global and ARA have partnered since 2005 to estimate and forecast North American rental revenue. Total market is comprised of U.S. and Canada and segmented into Construction and Industrial Equipment and General Tool.
- To better understand the U.S. Construction and Industrial Equipment market specifically, S&P Global further segments the Construction and Industrial Equipment market into 20 industries, to provide demand estimates for these industries.
- Industry-specific rental revenue is estimated using U.S. input output (IO) tables (published by BEA) and implied usage factors. IO tables provide insight into which industries use rental services and at what intensity. Industry-level forecasts are based on S&P Global's comparative industry service outlook.

U.S. Construction and Industrial Equipment Rental Revenue by Industry

	Rental Revenue (Mil $)		Growth Rates		Industry Share
Industry	**2023**	**2027**	**2023**	**2024**	**2023**
Agriculture	1,663	1,917	11.2%	6.5%	2.9%
Mining (incl Oil & Gas)	5,530	7,094	-6.3%	5.0%	9.8%
Utilities	211	247	-1.2%	4.8%	0.4%
Construction	18,789	21,722	17.6%	9.4%	33.2%
Manufacturing	2,345	2,623	10.7%	3.7%	4.1%
Wholesale Trade & Warehousing	3,117	3,703	17.1%	7.4%	5.5%
Retail Trade	1,320	1,565	17.1%	7.4%	2.3%
Transportation	2,248	2,638	13.1%	3.3%	4.0%
Communications	2,187	2,800	15.1%	9.4%	3.9%
Finance	1,157	1,380	25.1%	7.8%	2.0%
Real Estate	2,367	2,780	16.7%	6.7%	4.2%
Professional Services	3,540	4,287	17.3%	7.2%	6.2%
Management of Companies	2,393	2,864	14.5%	7.4%	4.2%
Admin, Support & Waste Mgmnt Services	1,086	1,300	14.5%	7.4%	1.9%
Education	184	223	18.2%	8.3%	0.3%
Health Care	1,928	2,459	17.3%	8.6%	3.4%
Arts and Recreation	719	877	22.2%	7.8%	1.3%
Accommodation & Food Service	739	845	19.3%	6.6%	1.3%
Other Services	1,126	1,317	19.4%	6.6%	2.0%
Government	4,025	4,654	14.9%	7.1%	7.1%
TOTAL	**56,673**	**67,296**	**13.7%**	**7.5%**	**100.0%**

Growth of Construction and Industrial Equipment Rental Revenue by Industry



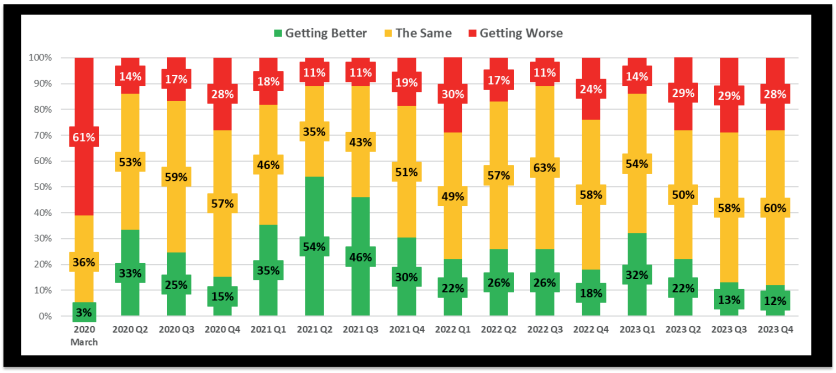
Source: S&P Global

© 2024 S&P Global

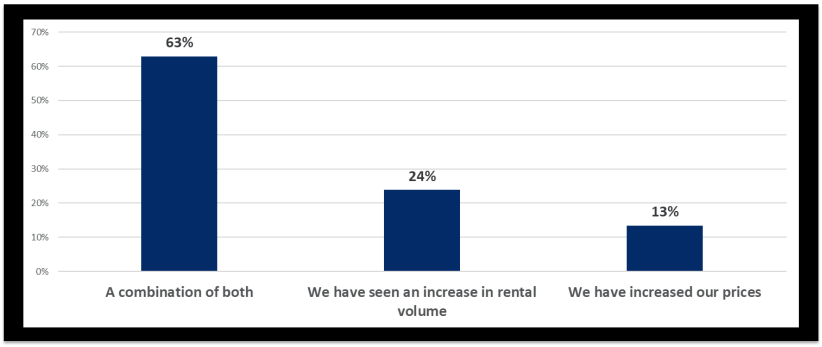
U.S. Industry Segmentation (2024 vs. 2023)

- The bubble chart showcases industry-level growth, comparing rental revenue in 2024 and 2023. Industries in the top right corner of the chart are expected to have continued strong growth, while those on the bottom left will lag. The size of the bubble represents each industry's share.
- 2024 will experience slower growth than 2023 for the majority of industries. Mining and Utilities are exceptions as their 2024 growth rates exceed 2023.
- In 2024, Construction, Communications, Health Care, Finance, Education, and Arts and Recreation are expected to lead in terms of growth; Manufacturing and Transportation will expand at more subdued rates.
- The Construction sector represents 33% of the total industry, with a rental revenue growth rate of 9% in 2024.

ARA Quarterly Survey

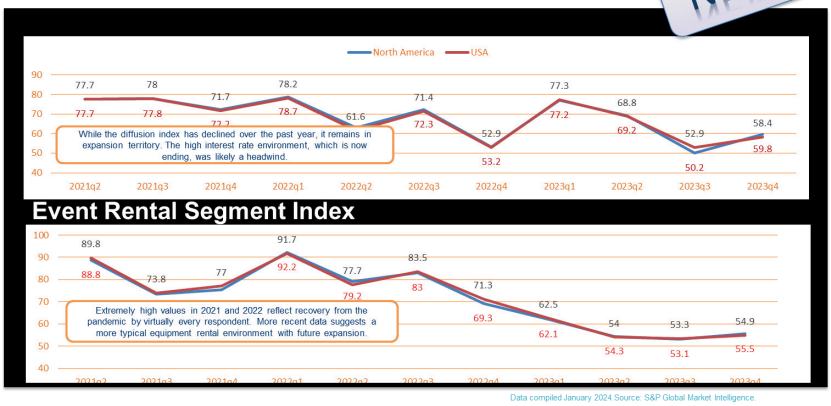


To what do you attribute your increase in revenue?



Rental Sentiment Index

NEW!

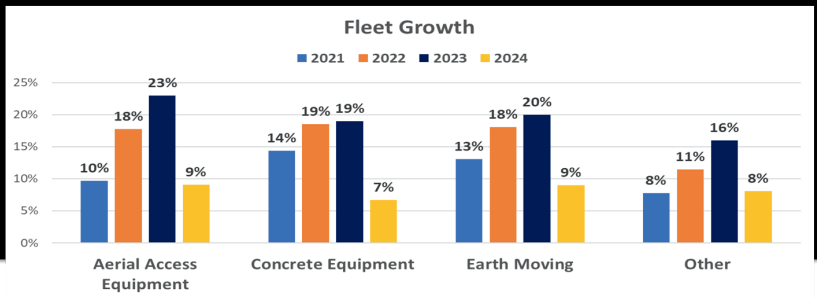


Data compiled January 2024 Source: S&P Global Market Intelligence.

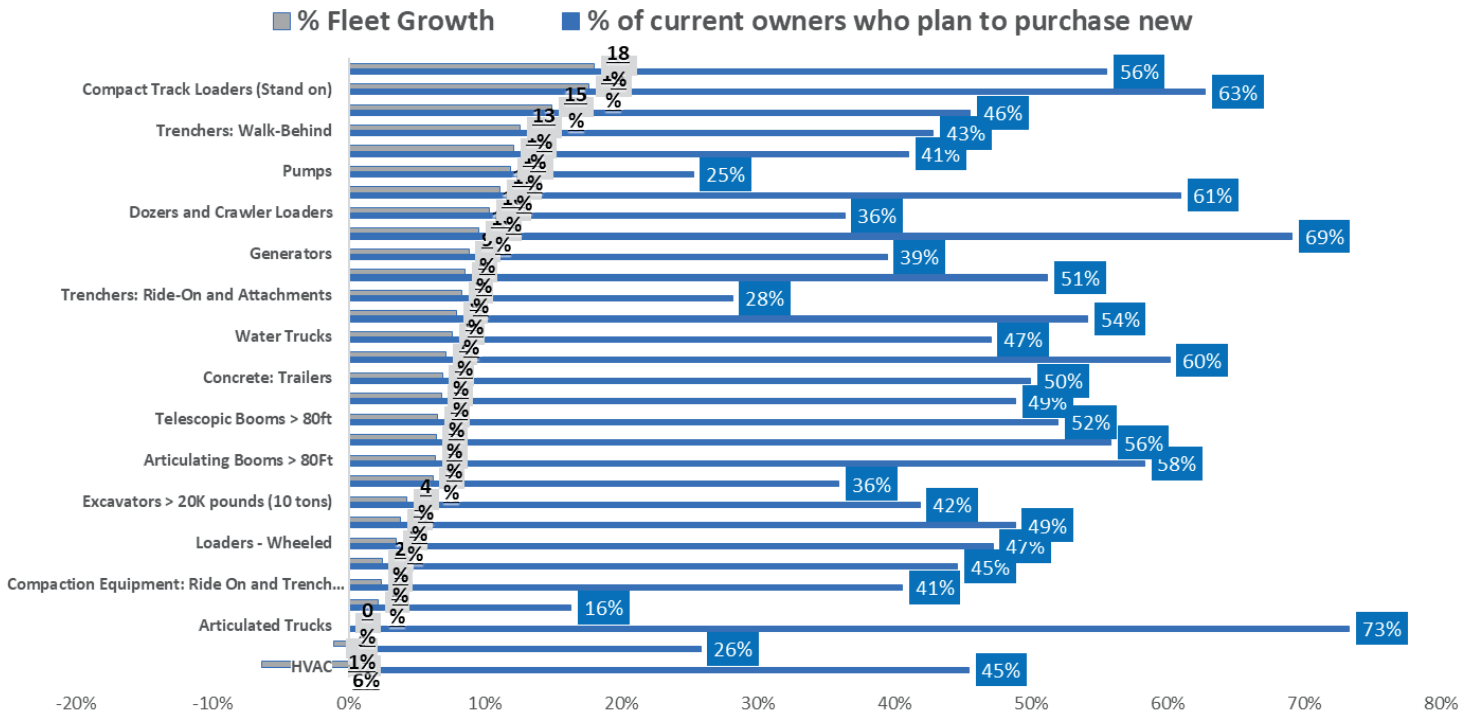
ARA Highlights & Rental Industry Insights

ARA Annual Construction Equipment Purchasing Forecast

- 4th Annual Survey, Total, by region, by size



ARA 2024 Purchasing Survey results



ARA Launches Industry Taxonomy

Tech, Analytics, and Metrics

ARA Standard Equipment Taxonomy (SET)

- Launched 2024 w/ 5 ERP partners
- Benchmarked against your inventories
- 13,000+ Make/Models integrated
- 20,000+ Aliases created
- Future expansion of Make/Model planned

Benefits: Data foundation, Consistent and comparable classifications and reporting, Improved user experience

Confidential

Equipment Category	Equipment Type	Equipment Specification (unit of measure)	UOM Minimum	UOM Maximum
Mobile Elevated Work Platform	Lifts - Scissor - Electric	FT Max Height	0	13
Mobile Elevated Work Platform	Lifts - Scissor - Electric	FT Max Height	14	19
Mobile Elevated Work Platform	Lifts - Scissor - Electric	FT Max Height	20	22
Mobile Elevated Work Platform	Lifts - Scissor - Electric	FT Max Height	23	28
Mobile Elevated Work Platform	Lifts - Scissor - Electric	FT Max Height	29	35
Mobile Elevated Work Platform	Lifts - Scissor - Electric	FT Max Height	36	40
Mobile Elevated Work Platform	Lifts - Scissor - Electric	FT Max Height	41	9999999

ARA SET

Level 1
High-level equipment categories

Level 2
Equipment Type

Software Ready
Each cell has a unique ID #

Level 3
Units of measure + category max/min

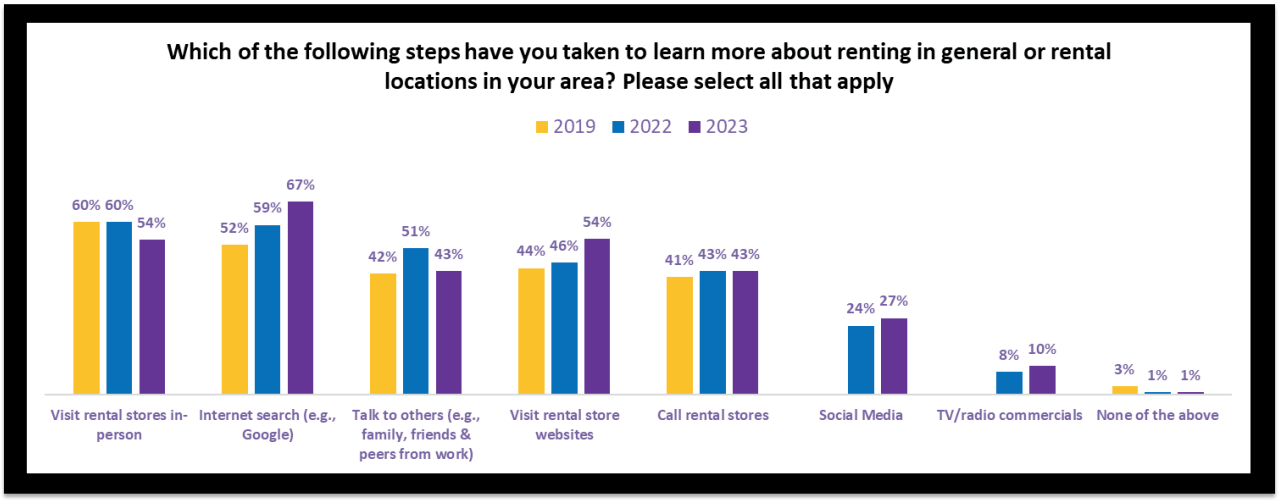
	level_1	level_1_id	level_2	level_2_id	level_3_min	level_3_max	level_3_uom	level_3_uom_short	level_3_id
834	Mobile Elevated Work Platform	110	Lifts - Scissor - Electric or Fuel - Rough Terrain	3670	50	59	FT Max Height	FT	9210
835	Mobile Elevated Work Platform	110	Lifts - Scissor - Electric or Fuel - Rough Terrain	3670	60	69	FT Max Height	FT	9220
836	Mobile Elevated Work Platform	110	Lifts - Scissor - Electric or Fuel - Rough Terrain	3670	70	9999999	FT Max Height	FT	9230
837	Mobile Elevated Work Platform	110	Lifts - Scissor - Fuel	3680	0	13	FT Max Height	FT	9240
838	Mobile Elevated Work Platform	110	Lifts - Scissor - Fuel	3680	14	19	FT Max Height	FT	9250
839	Mobile Elevated Work Platform	110	Lifts - Scissor - Fuel	3680	20	22	FT Max Height	FT	9260
840	Mobile Elevated Work Platform	110	Lifts - Scissor - Fuel	3680	23	28	FT Max Height	FT	9270
841	Mobile Elevated Work Platform	110	Lifts - Scissor - Fuel	3680	29	35	FT Max Height	FT	9280
842	Mobile Elevated Work Platform	110	Lifts - Scissor - Fuel	3680	36	40	FT Max Height	FT	9290
843	Mobile Elevated Work Platform	110	Lifts - Scissor - Fuel	3680	41	9999999	FT Max Height	FT	9300
844	Mobile Elevated Work Platform	110	Manlifts - Boom - Accessories	3690	0	1	Units	Units	9310
845	Mobile Elevated Work Platform	110	Manlifts - Boom - Articulating - Electric	3700	0	29	FT Max Height	FT	9320
846	Mobile Elevated Work Platform	110	Manlifts - Boom - Articulating - Electric	3700	30	34	FT Max Height	FT	9330
847	Mobile Elevated Work Platform	110	Manlifts - Boom - Articulating - Electric	3700	35	39	FT Max Height	FT	9340
848	Mobile Elevated Work Platform	110	Manlifts - Boom - Articulating - Electric	3700	40	49	FT Max Height	FT	9350
849	Mobile Elevated Work Platform	110	Manlifts - Boom - Articulating - Electric	3700	50	59	FT Max Height	FT	9360

Organize, and manage each equipment item in a Rental Company's inventory; 387 Manufacturers, 13k models.

Confidential – Internal Use Only

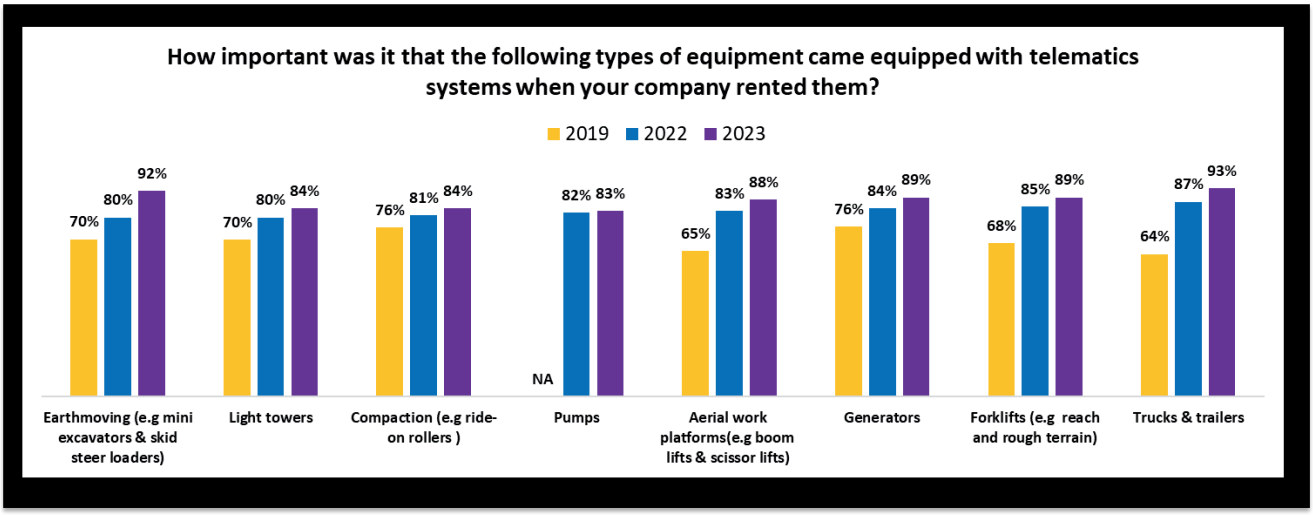
ARA Contractor Survey Results (example)

Q: Rental locations must have a strong online presence as many customers get rental information through an internet search or rental store websites.



ARA Highlights & Rental Industry Insights

ARA Consumer Survey: The importance of telematics has increased for all product types



Driving Industry Awareness: Jobs of Tomorrow

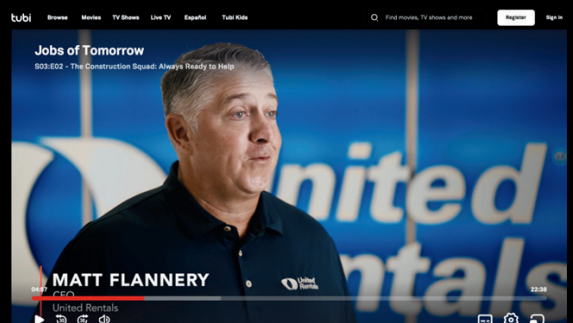
Overview: Docuseries aimed at young adults, highlighting exciting careers in the rental industry.

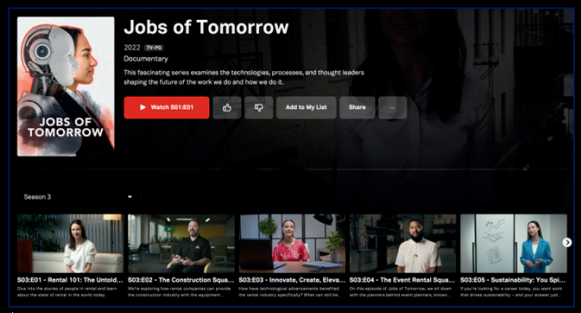
Episodes:

- Rental 101: Untold Stories
- The Construction Squad: Always Ready to Help
- Innovate, Create, Elevate: The Intersection of Technology and Rental Industry
- Sustainability: You Spin Me Round
- Why the Best Jobs Were the Best Kept Secrets

Availability: Tubi, AppleTV (limited), Roku, Amazon Prime (coming soon), YouTube (coming soon)

Implemented a Student Membership (>1000)





Confidential – Not for Distribution

Rental as a sustainable solution

Key Initiatives: Sustainability

Launched ARA Sustainability Task Force

38% of our equipment count is EV or hybrid

Scope 1 & 2 GHG emissions intensity decreased 5%

Non-toxic waste to landfill intensity decreased 23%



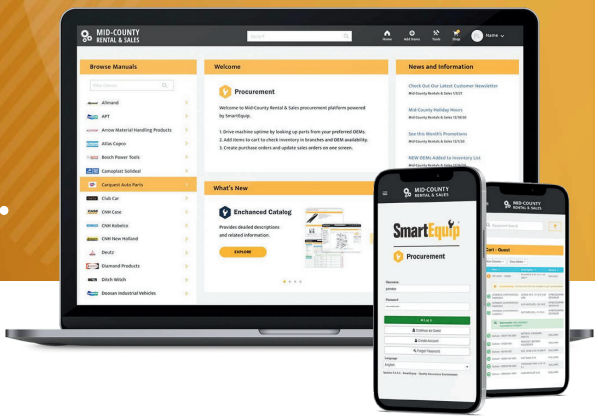
Key Initiatives: Mental Health

Launched ARA Mental Health Task Force

- Focus on messaging, removing the stigma, sharing best practices, and providing tools

SmartEquip Procurement™

Streamline spare parts purchasing and shop workflow all on one platform.



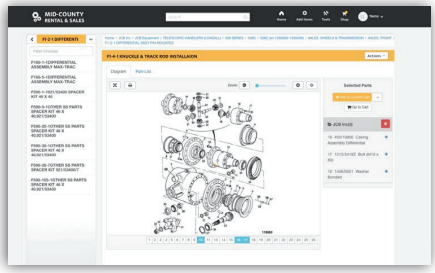
- Multi-manufacturer platform for parts and service information.
- Serial number specific parts look-up for accurate orders
- Exponential improvement in shop efficiency and technician wrench time

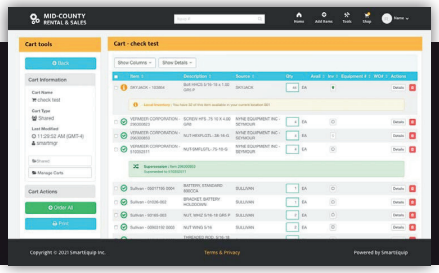
Double Technician Wrench Time in 3 Easy Steps

1

Access

Access product support information with easy-to-read point-and-click schematics and parts lists, anywhere, any time with a single log-in.





2

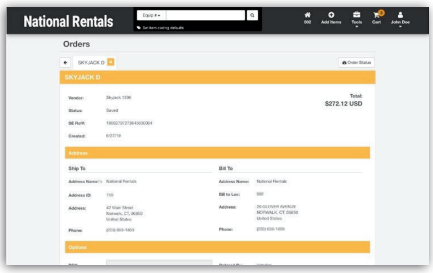
Validate

Leverage up-to-date inventory management technology to submit accurate parts orders and stay current on parts supersessions or substitutions.

3

Place Order

Submit purchase orders for multiple pieces of equipment, across all your brands on a single platform.



Schedule a demo to see how you can streamline spare parts purchasing and shop workflow today.

SmartEquip®

www.smartequip.com/procurement

BeReady@smar tequip.com

203.899.1800

ROUSE FLEET MANAGER™

Drive Better Decisions with a Better Fleet Management Process



Today's used equipment market is ever-changing, and it's more important than ever to stay informed and act fast. Rouse Fleet Manager gives you real-time valuation insights alongside simple, self-serve access to Ritchie Bros.' range of world-class selling platforms, all in one easy-to-use software platform.

EASY UPLOAD
Leverage modern AI-based tools to easily load and classify your fleet

Simply load your fleet in any Excel format and allow our tech to take over as your data gets automatically validated and transformed into proper OEM-issued makes and models. Have an ERP system? Even better, connect your ERP to Rouse Fleet Manager and take advantage of automatic fleet updates.

INSIGHTS
Know what your fleet is worth

Rely on accurate, up-to-date live Marketplace-E and auction price estimates directly from Rouse Services, the industry gold standard for equipment insights. Interested in deeper analytics? Subscribe to Rouse Equipment Insights and dive deeply into the latest dynamics across the Retail, Wholesale and Auction markets.

FLEET MANAGEMENT
Replace post-its and shared drives with scalable software

Centralize your fleet management operations into a single, accessible place with Rouse Fleet Manager. Store photos, upload files like Purchase Orders and Maintenance Records, and log notes about your assets throughout the ownership lifecycle.

SALES
Manage your selling efforts across multiple channels

Easily sell assets across all of Ritchie Bros.' transaction solutions, including Ritchie List, Marketplace-E, IronPlanet, and Ritchie Bros. live auctions. Select the selling solution that's right for you, or cascade assets through different channels.

I'm not certain I'm ready to sell. Should I load my fleet?

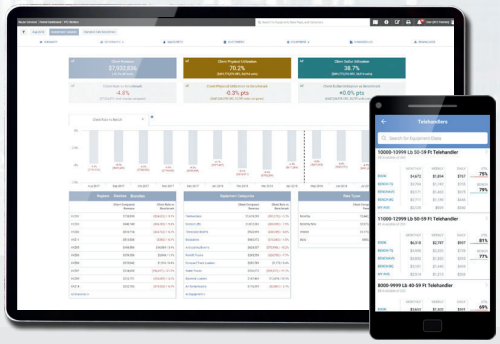
Rouse Fleet Manager is built to support you across the entire equipment lifecycle. Upload and store your full inventory and take full advantage of everything Rouse Fleet Manager has to offer.

ROUSE™

rouseservices.com/solutions/fleet-manager
info@rouseservices.com 1-310-360-9200

ROUSE RENTAL INSIGHTS™

Compare Rental Rates and Utilization to the Competition in your Local Market



Now you can make informed business decisions based on industry benchmark rates and utilization. Rouse collects and aggregates data from over 350 participating rental companies and dealers across North America, the UK, and Europe. Rouse Rental Insights can help you answer questions like "How do my rates on a 45' telescopic boom lift in Houston compare to the rates being achieved by my competitors?"

Rouse Rental Insights – in action

Extensive data on rental fleets
Rouse Rental Insights collects nightly fleet snapshots on over $100 billion of fleet on an OEC basis and $44 billion in annual rental revenue.

Mobile quoting app
Bring the power of the web portal to the hands of users out in the field so sales reps and fleet managers can quickly get the data they need.

Benefit at no cost
Subscribers receive a free 30-day trial with unlimited dashboard and mobile app access. High-level reporting on utilization and rate performance is complimentary for all subscribers.

Strong data security
All client information is transmitted via secure encrypted file transfer protocol to Rouse servers in a secure data center.

Equipment type dashboard
Monitor product-type level fleet performance and understand if specific branches, sales reps, and customers are helping you achieve your rental goals.

Seamless integration
Rouse integrates with over 45 of the most commonly used rental software systems. We make it easy to connect with minimal involvement from your IT team.

Contact us now to see how Rouse Rental Insights can benchmark your performance against your peers.

ROUSE™

rouseservices.com/solutions/rental-insights
info@rouseanalytics.com 1-310-360-9200

Best Practices for Accurate Inventory Tracking



Agenda

Inventory Control & Management
Tony Tye
InTempo Software

Live Equipment Inventory Dashboard: Guest Speaker
Russell Pate
Fleet and Process Manager, RentalWorks

Cycle Count Portal
Andy Buchholtz
Innovative Software Solutions, inc.

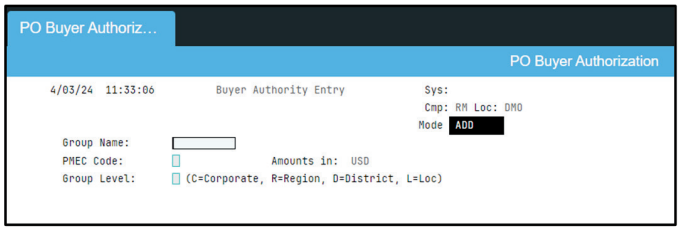
Inventory Management

- PO Buyer Authorization
- Item Master
- Bin Locations
- Item Submissions
- Requisitions
- Cycle Counts



Inventory Control doesn't just start once an item is in inventory. It begins when you decide to purchase it!

Who is ordering?



Buyer Authorizations is the best first defense against waste and can be set up at many levels and categories

Fields

Group Name
Enter the name of the purchase order buyer group.

PMEC Code
Enter the code for the type of items that the group is allowed to purchase. Valid codes include:

- **P** - Parts
- **M** – Merchandise
- **E** - Equipment

*This field works in conjunction with settings in control record **POCRT1**. If you have the Limit by **PMEC** Code field set to Y in that control record, and you have created buyer groups with specific PME codes, be sure to enter those PME codes in the **Limit PO IMPMEC** code amt field in that same control record. If you do not enter those same PME codes in the Limit PO IMPMEC code amt field, the system will not check amounts on PO lines where the item is assigned that PME code, regardless of the buyer groups you have set up.*

Group Level
Enter the code for the buying authority level for the group. Valid codes include:

- **C** - Corporate
- **R** – Region
- **D** - District
- **L** - Location



Authorization can be set up in many ways depending on your business requirements

Maximum PO $
Maximum PO Line $
Requisition $

PO Approval Levels
Requisition Approval Levels

Group Description

Enter a brief name or description for the group.

Maximum Purchase Order Amount

Enter the maximum amount for a total purchase order that members of this group can order. The amount should be expressed in the currency in the **Amounts In** field.

At the bottom of the screen, enter exceptions by authority level (region, district, or location) for the buyers in the group. For example, you have set up a location-level buyer group with a maximum purchase order amount of $5,000 and an authorization level of 3. However, one of your locations is smaller than the others, and they would never have a purchase order as high as $5,000. Enter an exception for that location at the bottom of the screen with their maximum purchase order amount (perhaps $2,500), and you might want to set a lower authorization level as well.

Maximum Purchase Order Line Amount

Enter the maximum amount for each purchase order line that members of this group can order. The amount should be expressed in the currency in the **Amounts In** field

Purchase Order Change Authorization

Enter the level of purchase order change authorization for buyers in this group. This number must be between 0 and 9, and it indicates when a buyer can change a purchase order entered by someone else. The higher the number, the higher the buyer's change authorization. For example, if a buyer's change authorization level is 3, that buyer can only change purchase orders that have been entered by buyers with authorization levels set at 3 or less.

Requisition Authority

Enter the level of requisition authorization for buyers in this group. This number must be between 0 and 9, and it indicates when a buyer can change or authorize a requisition entered by someone else. The higher the number, the higher the buyer's change authorization. For example, if a buyer's authorization level is 3, that buyer can only change or authorize requisitions that have been entered by buyers with authorization levels set at 3 or less.

If a buyer's authorization level is less than 9, all of his/her requisitions are created with a status of **A**, and they need to be authorized by someone with a higher level before they can be converted to a purchase order. Requisitions created by users with an authorization level of 9 are automatically authorized when they are created.

Requisition Amount
Enter the maximum amount for a total requisition that members of this group can order. The amount should be expressed in the currency in the **Amounts In** field.

Employees (Corporate Level Group)
Enter the system IDs for the employees who are part of this group. If you do not know the ID, press **F4** to search for it.

Region/District/Location Exceptions
Enter the code for the region, district, or location for which you want to set a buying exception.

Maximum Purchase Order Amount
Enter the maximum amount for a total purchase order that members of this group in the specified region/district/location can order. The amount should be expressed in the currency in the **Amounts In** field.

Maximum Line Amount
Enter the maximum amount for a purchase order line item that members of this group in the specified region/district/location can order. The amount should be expressed in the currency in the **Amounts In** field.

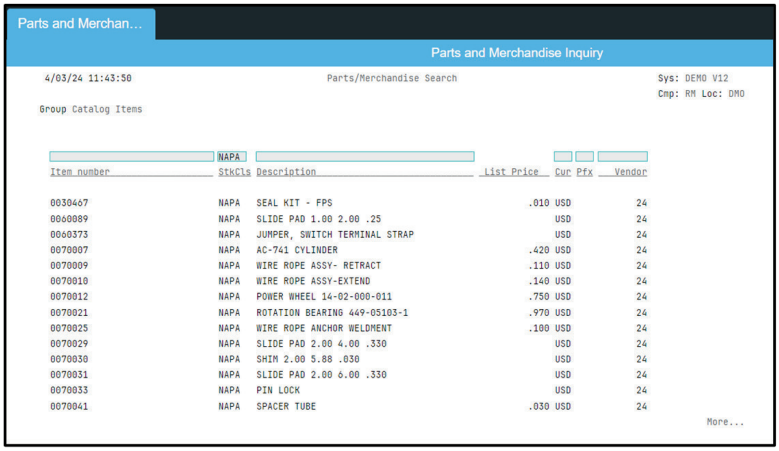
Purchase Order Authorization
Enter the level of purchase order change authorization for buyers in this group in the region/district/location specified. This number must be between 0 and 9, and it indicates when a buyer can change a purchase order entered by someone else. The higher the number, the higher the buyer's change authorization for example, if a buyer's change authorization level is 3, that buyer can only change purchase orders that have been entered by buyers with authorization levels set at 3 or less.

Requisition Authority
Enter the level of requisition authorization for buyers in this group in the region/district/location specified. This number must be between 0 and 9, and it indicates when a buyer can change or authorize a requisition entered by someone else. The higher the number, the higher the buyer's change authorization. For example, if a buyer's authorization level is 3, that buyer can only change or authorize requisitions that have been entered by buyers with authorization levels set at 3 or less.

If a buyer's authorization level is less than 9, all of his/her requisitions are created with a status of **A**, and they need to be authorized by someone with a higher level before they can be converted to a purchase order. Requisitions created by users with an authorization level of 9 are automatically authorized when they are created.

Best Practices for Accurate Inventory Tracking

Catalog files help establish consistency with your item numbers and descriptions. They prevent duplicate item numbers and save time when needing to add a part number to your system.



You send them to us and then they are there when you need them!

Fields

Item number
Displays the item number you want to add, change, or inquire on.

Stock class
Displays the stock class Code used to categorize sales items for analysis and reporting. You may choose to make the stock class a subset of the vendor code. associated with the item number.

Status code
Enter or accept the current status for the sales item. Valid codes are:

- **A** - Active
- **D** - Deleted
- **S** - Suspended

Stock status
Enter **NS** if this sales item is considered a non-stock item that is not included on reorder reports and physical inventory count sheets. Use the Default Codes program in Cross Application Maintenance to set up additional user-defined stock status codes using code **SS**.

P/M/E code
Enter the code that represents the type of sales item. Valid codes are:

- **P** - Part
- **M** - Merchandise
- **E** - Equipment

Description
Enter a brief description of the item.

Search word
Enter text that you can use to search for this item on inquiry screens.

Last cost update
Enter or accept the date of the last time the **Last Cost** field was updated by the system. This date is automatically populated by the system, so change it only on an exception basis.

Manufacturer's item number
Enter the manufacturer's item number assigned to this sales item.

UPC
If applicable, enter the UPC number assigned to the item.

UPC Code
If applicable, enter the code associated with the UPC number. Two codes are supported, and the default code is **UP**.

G/L category
Enter the code that represents the link between this item and the G/L sales revenue distribution file. The G/L distribution determines the general ledger account numbers used for revenue, inventory and cost of goods sold when this item is sold or purchased. This information might be defaulted from the item's stock class, and it might be protected against changes on this screen.

If field **ZXYON3** of control record **SAITMM** is set to **Y**, this G/L category is defaulted from the master record of the stock class assigned to this item, and you cannot change it.

If control record **SAITM2 - Use G/L Cat in Stock Master** is set to **Y**, the G/L category is always defaulted from the stock class assigned to the item, regardless of any entry made here.

Pricing at Company/Warehouse/Location
Indicate if the pricing for this item is at the company (N), warehouse (W), or location (Y) level. If you enter **N**, the pricing for this item comes from its master record. If you enter **Y**, the pricing for this item comes from the price set at the location where the item is being transacted. If you enter **W**, the pricing for this item comes from the location that is set as its warehouse/supplying location.

Your setting in this field overrides the setting at the location level; however, if you leave this field blank, the setting at the location level is the default for this item.

Tax product number
If you are integrated with a tax software package, and if applicable, enter the tax product category/number that groups this item for special taxation.

Last/current cost
Enter or accept the last or most current cost of this sales item. This field is automatically updated when the item is received against a purchase order in the system.

Currency
Enter or accept the code for the currency in which all monetary amounts on this screen are displayed/entered.

Auto calculate cost based on List or Regular
If you want to use the sales item's list or regular price to automatically calculate its **last/current cost**, indicate which price to use: List Price (L) or Regular Price (R).

Percentage of List or Regular
If you entered a code in the **Based on** field, enter the percentage by which the list or regular price should be multiplied to arrive at the last/current cost.

List price
Enter the manufacturer's suggested list price for the item. This amount is not used for invoicing; it may be used for calculation of cost or selling price based on the codes assigned for auto calculations.

Regular price
Enter the retail price normally charged for this item. In the event there are no discounts or other pricing codes assigned for the transaction, this is the price the system uses when this item is being sold.

Auto calculate regular price based on Cost or List
If you want to use the sales item's cost or list price to automatically calculate its **regular (retail) price**, indicate which one to use: List Price (L) or Cost (C).

Percentage of Cost or List
If you entered a code in the **Based on** field, enter the percentage by which the list price or cost should be multiplied to arrive at the regular (retail) price.

Preferred price
Enter the price that is used when this item is sold to a customer with a price code of **P** in their master record.

Auto calculate preferred price based on Cost, List, or Regular
If you want to use the sales item's cost or list price or regular price to automatically calculate its **preferred price**, indicate which one to use: List Price (L), Cost (C), or Regular Price (R).

Percentage of Cost, List, or Regular
If you entered a code in the **Based on** field, enter the percentage by which the list price or cost or regular price should be multiplied to arrive at the preferred price.

Dealer price
Enter the price that is used when this item is sold to a customer with a price code of **D** in their master record.

Auto calculate dealer price based on Cost, List, Regular, or M
If you want to use the sales item's cost, list price, regular price or a formula to automatically calculate its **dealer price**, indicate which one to use: List Price (L), Cost (C), Regular Price, (R), or formula (M).

Enter **M** if you want the system to calculate the Dealer Price based on the formula: **(List + Last Cost) / 2**.

Percentage of Cost, List, or Regular
If you entered a code other than **M** in the **Based on** field, enter the percentage by which the list price or cost or regular price should be multiplied to arrive at the dealer price.

Usual vendor
Enter the number of the vendor from whom you usually purchase this item. This is the vendor used on reorder and analysis reports for this item.

Omit from ENB
If set to Y, the system will not process this item in the Earned Not Billed report.

1st unit of measure
Enter the code that represents the smallest unit of measure in which this item is sold, purchased, or stocked.

2nd unit of measure
Enter the code that represents the second unit of measure in which this item is sold, purchased, or stocked.

2nd quantity
Enter the quantity of items in the first unit of measure that is equivalent to one unit in this second unit of measure.
Example: The first unit of measure is **EA** for each. The second unit of measure is **BX** for box. There are **10** of this item (as each) in one box, so enter **10** in the **Quantity** field. When this item is sold, purchased, or counted during inventory, you can enter a unit of measure of BX, and the actual boxes sold, purchased, or counted, and the system calculates the amount as each based on this quantity.

3rd unit of measure
Enter the code that represents the third unit of measure in which this item is sold, purchased, or stocked.

3rd quantity
Enter the quantity of items in the first unit of measure that is equivalent to one unit in this third unit of measure.
Example: The first unit of measure is **EA** for each. The third unit of measure is **CS** for case. There are **100** of this item (as each) in one case, so enter **100** in the **Quantity** field. When this item is sold, purchased, or counted during inventory, you can enter a unit of measure of CS, and the actual cases sold, purchased, or counted, and the system calculates the amount as each based on this quantity.

Rental category
If this item is used in your rental fleet as either serialized or bulk equipment, enter the category for this item. This information is necessary when completing a sales to rental transaction.

Rental class
If this item is used in your rental fleet as either serialized or bulk equipment, enter the class. This information is necessary when completing a sales to rental transaction.

Rental sub-class
If this item is used in your rental fleet as either serialized or bulk equipment, enter a maintenance sub-class for it.

Serialized
Indicate whether you track this item individually with unique serial numbers. When you set this to **Y**, you must enter serial numbers when selling, receiving, or transferring this item. You can also use Serial Number Maintenance to add or change sales item serial numbers.

Taxable
Indicate whether you apply tax to this item when you sell it. If the customer to whom you are selling the item is marked as non-taxable, this setting is ignored.

Discountable
Indicate whether this item is discountable. If set to **N**, this setting overrides discounts set in the customer master file and sales item discounts set in Sales Item Discount Maintenance. This setting does not disallow manually entered discounts.

Inventoried
Indicate whether you track this item in inventory. If set to **Y**, a sales item location record is required for each location that stocks this item. The quantity on hand is automatically updated in the system for items that are marked as Inventoried.
If the sales item is considered a kit, set this field to **N**, unless the **Use Inventoried kits opt** field is set to **Y** in control record **SAKITM**.

Commissionable
Indicate whether sales of this item are calculated for sales representative commissions.

Expected profit percentage
Enter the profit percentage you expect to achieve when this item is sold. You can set the system to warn you during a sales transaction if this profit percentage is not met. Run the Inventory Profit Analysis report to review the profit percentage on sales transactions.

Inventory class
Enter a user-defined code to classify the item for query and analysis purposes. If you do not know the code, press **F4** to search for it.

Cost overhead percentage
If applicable, enter the percentage to add to this item's cost when the cost is displayed. The inflated cost is displayed for users with security code **Z01** in their user profile. Users with security code **Z02** will see the item's actual cost.

Commission percentage inside
If applicable, enter the percentage used to calculate split commissions for inside sales representatives.

Commission percentage outside
If applicable, enter the percentage used to calculate split commissions for outside sales representatives.

Freight percentage
Enter the percentage of the sale price of the item to charge for freight.

Excise tax percentage
Enter the percentage of excise tax. Tax charged on the production or sale of a good or service. to charge for this item.

Material code
Enter the code that classifies this item for VAT Value added tax. The tax structure used outside of North America. taxation purposes.

Re-Ordering: What Fields Do You Currently Use?

Reorder Information

Order method

Enter the code that represents the method you want the system to use when suggesting reorder dates and quantities for this item. The code is automatically populated from the setting in control record **SAITM5**, but you can change it. Valid codes are:

- O - Order point. With this method, you enter the quantity (on hand) to which the item must fall before you reorder it, and you enter the quantity to reorder.
- U - Usage. With this method, you enter the number of days of supply (based on the average daily usage) to which the item must fall before you reorder it, and you enter the quantity to reorder.
- E - EOQ (Economic Order Quantity). The system calculates this using the following formula: **square root of (((2 * cost of processing a PO) * (the usage in a month)) / (item unit cost * system percent))**
- N - Don't order item

If you enter **O** or **U**, enter information in the **Order Point/Quantity** fields.

Order Point/Quantity

If you entered an **Order method** of **O**, use the first field to enter the quantity (on hand) to which the item must fall before you reorder it, and enter the quantity to reorder in the second field.
If you entered an **Order method** of **U**, use the first field to enter the number of days of supply (based on the average daily usage) to which the item must fall before you reorder it, and enter the quantity to reorder in the second field.

EOQ

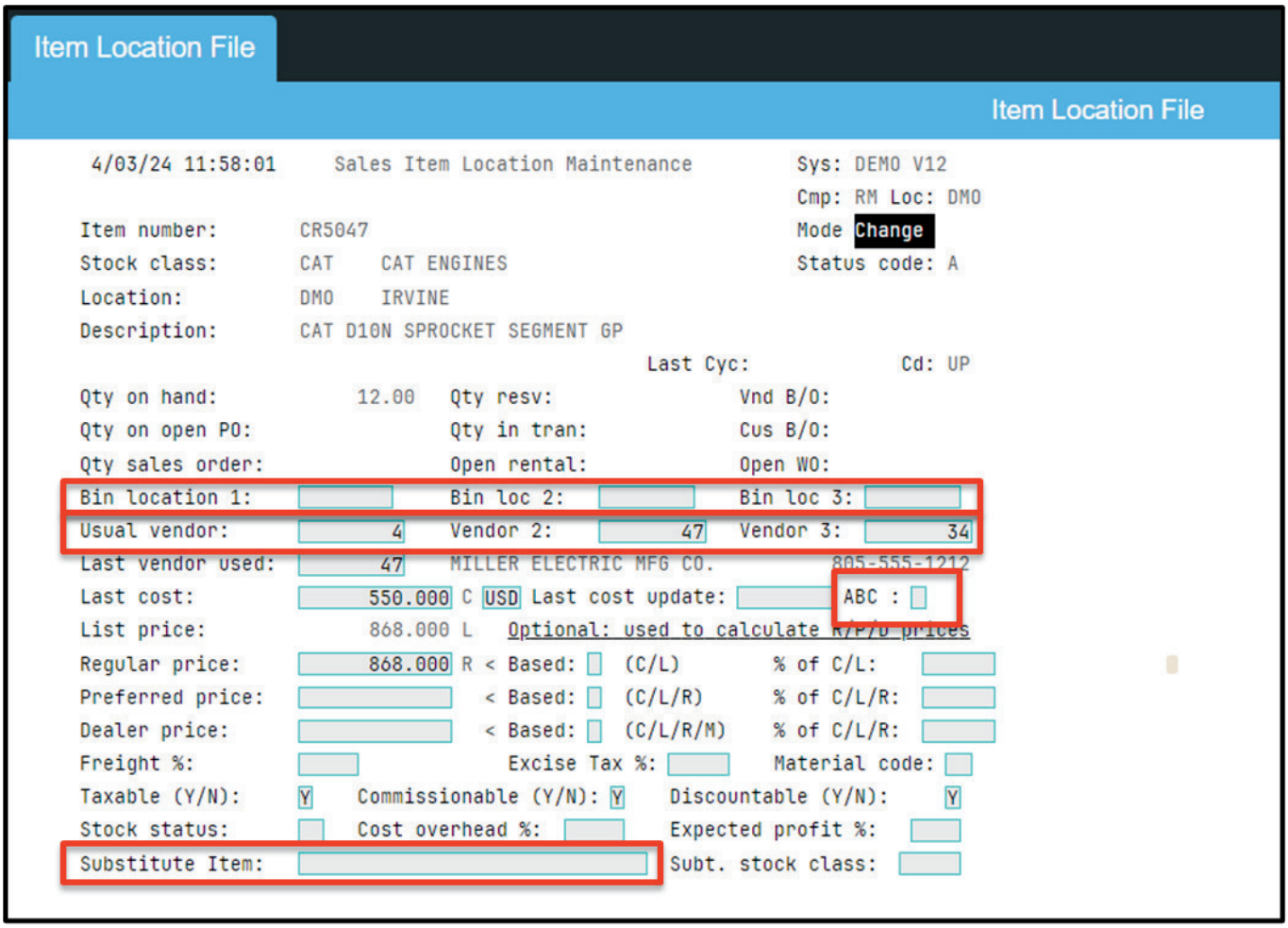
Displays the system-calculated economic order quantity for this item.

Reorder period in days

If you entered an **Order Method** of **E** for EOQ, enter the period of time in days that the system uses to determine the suggested order quantity.

Re-Ordering: What Fields Could You Start Using to More Efficiently Track Re-Orders?

Best Practices for Accurate Inventory Tracking



Key items to look at in the Location file

- Bin locations
- Vendor Information
- ABC Analysis
- Substitution/Superseded Items

Best Practices for Accurate Inventory Tracking

ABC Analysis

What is ABC analysis for inventory optimization?

ABC analysis is a tool within a greater subset of tools to help inventory managers and owners more effectively manage their inventory turnover and profitability. Knowing what items are business critical is the first step, but being able to make more educated decisions around stocking policies based on actual customer demand will drive actionable improvements in operational efficiencies.

When it comes to managing large volumes of inventory, simply managing the movement of those items is not an effective strategy to ensure your costs are properly managed and that stock levels are optimized.

Economic Order Quality

Economic order quantity (EOQ) calculation used in cost accounting. It's a formula that allows you to calculate the ideal quantity of inventory to order for a given item. The calculation is designed to minimize ordering and carrying costs. It goes back to the early 1900's, when Ford W. Harris wrote an article called "How Many Parts to Make at Once."

EOQ is based on the following set of guidelines:

Reorder point: The reorder point is the time when the next order should be placed. EOQ assumes that you order the same quantity at each reorder point.

Demand, relevant ordering cost, and relevant carrying cost: Customer demand for the product is known. Also, the ordering and carrying costs are certain.

Purchase order lead time: The lead time is the time period from placing the order to order delivery. EOQ assumes that the lead time is known.

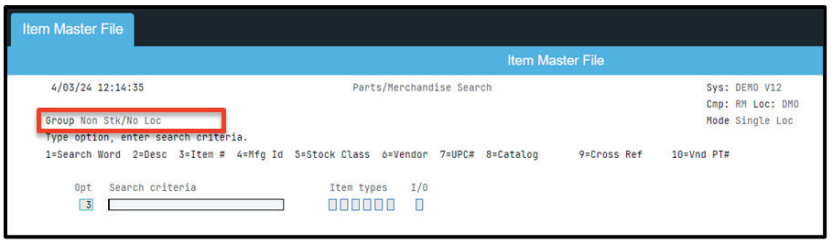
Purchasing cost per unit: The cost per unit doesn't change with the amount ordered. This removes any consideration of quantity discounts. Assume you'll pay the same amount per unit, regardless of the order size.

Best Practices for Accurate Inventory Tracking

Non- Stock / Non-Location

Non-Stock allows for items to be tracked by item number but not carried on your balance sheet. They are expensed at time of purchase.

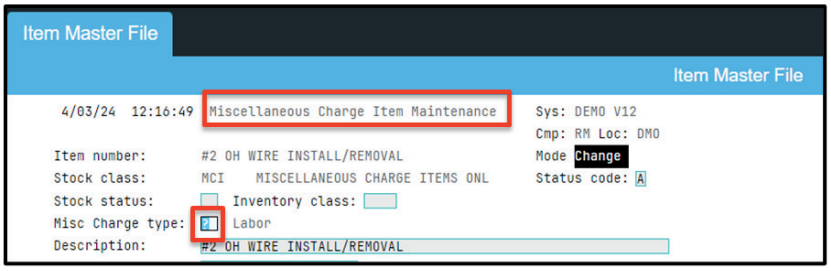
Non-Location are item master records that have not been made location specific.



Miscellaneous Charge Items

Miscellaneous charge items are charge items for Misc. revenue items charged.

Keep in mind that when these are set up you must select the correct type so the items will hit the Revenue Recap Display Correctly.




```
Valid types:LB=Labor,DL=Dlv,PK=P/U,FL=Fuel,TX=Tax,CL=Clean,MS=Misc,EC=Env chrg
```

Miscellaneous Charge Items

Fields

Item number
Displays the item number you want to add, change, or inquire on.

Stock class
Displays the stock class Code used to categorize sales items for analysis and reporting. You may choose to make the stock class a subset of the vendor code associated with the item number.

Status code
Enter or accept the current status for the sales item. Valid codes are:

- A - Active
- D - Deleted
- S - Suspended

Miscellaneous charge type
Enter the code that represents the type of miscellaneous charge item. Valid codes are:

- LB - Labor
- DL - Delivery
- PK - Pick up
- FL - Fuel
- TX - Taxes
- CL - Cleaning
- MS - Miscellaneous Item
- EC - Environment Charge

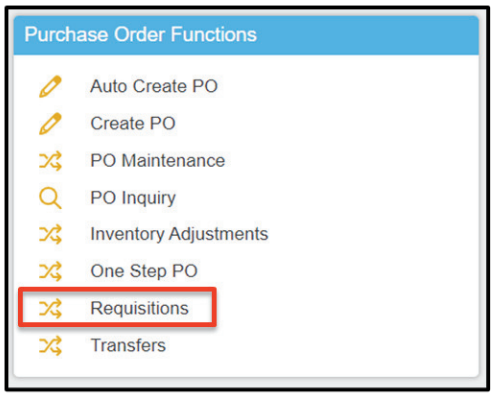
Description
Enter a brief description of the item.

How are they ordering it?

A properly utilized requisition process is the best tool you have for inventory control.

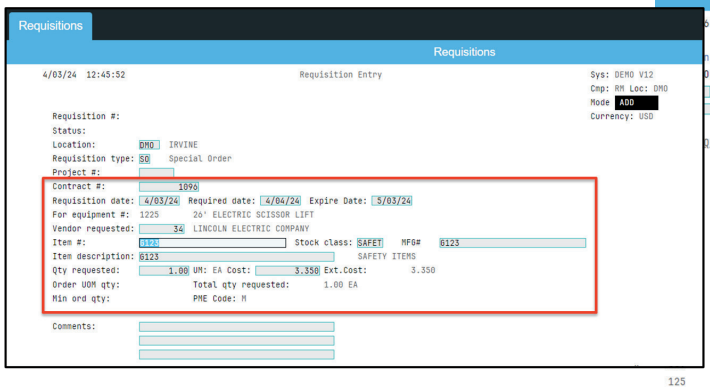
Every company currently uses some form of requisitions whether it is verbal or sticky note.

Electronic requisitions used with in Enterprise is easier, more efficient and consistent.

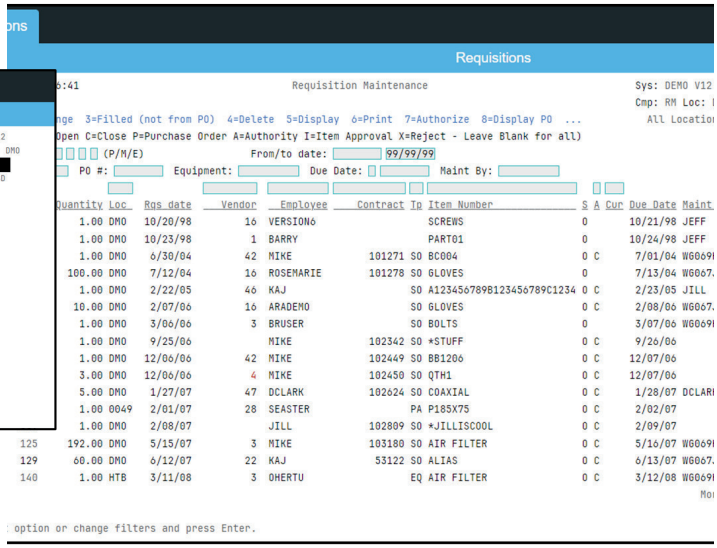


As seen in the PO Buyer Authorization Section requisitions can also be controlled by $ amounts and authority levels.

When a PO is created for a requisitioned item it links the PO to the source and what it was intended for as seen below.

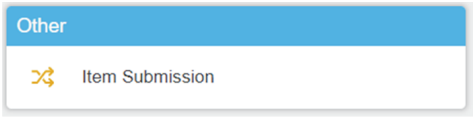


Requisitions can be managed locally or at the corporate level depend on the approval levels you control.



Best Practices for Accurate Inventory Tracking

Item Submissions



Item submissions is the best way to keep your inventory standardized and consistent. Also controls where you are purchasing from to maximize discounts.

This option gives the ability to allow users in the field to request a new Item but would require an approval before the item is added to the Item Master.

Item Submission Security



For this functionally to be used:

- **Item Submission Security – Menu Option 8-80-11 (811)**
  1. **Field level security**
     - **User**
     - **Group Profile**
  2. **To request New Item: User/Group Profile needs to be setup**
  3. **Define users that will be able to Approve/Reject requested Item**
- **Item Submission - Menu option 2-39 (J39)**
  1. **Add new request**
  2. **Approve / Reject Request**
     - **(Approved) Setup of New Item – Item Master**
     - **Email Notification to User when Item has been approved or rejected.**
- **Requisitions – Menu option 2-7 (J07)**
  1. **When using requisitions this will call the Item submission menu if the item does not exist in the Item Master File.**
     - **The request will put the status of (I) pending Item submission approval.**
     - **Once approved it follow normal buyer authority requirements for required approval.**
- **Item Submission Email Maintenance – Menu option 8-14 (D14)**
  1. **This option will provide the ability to generate a notification hierarchy when submitted items are not approved.**
  2. **Define user that will get notification of New Items that need to be reviewed.**
     - **If item does not get approved same day an escalation of all pending items can be sent.**

(1) Submission Security - (Field Level Security) Menu option 8-80-11
The will need to be setup for anyone that will be requesting a new Items to be added to the system.

Cycle Counting

Cycle Counts are the best practice for maintaining correct inventory levels.

They allow you to count your entire inventory multiple times yearly a little at a time (depending on your inventory size).

You can also choose what you count and when you count it.

You can count the more problematic classes more frequently than the low activity classes.

When cycle counting you also have the opportunity to perform root cause analysis and improve your processes. This is an often overlooked benefit of cycle counting don't just accept that it is missing why is it missing.



When a company engages in cycle counting, it will experience higher levels of inventory record accuracy, which leads to higher confidence in the resulting inventory valuation. This in turn, leads to the elimination of physical inventory counts, since the inventory records are already so accurate that no physical verification is required. If inventory no longer needs to be counted at the end of each reporting period, the result can be an accelerated closing process. If the outside auditors feel they can rely on these inventory records, they may scale back their audit procedures, which in turn reduces the audit fees they charge to the company. Also, there would no longer be a need to pay employees overtime to count inventory, or to close down the production area while physical counts are conducted.

Download a Step-by-Step Guide to Setting Up Cycle Counts:

Sales and use tax and managing ancillary fees that are state-mandated or general business practices are not the most exciting topics to discuss. However, managing these two areas well provides revenue opportunities and accurate tax collection and remittance.

Vertex provides an integrated solution to support the calculation of sales and use tax on all transactions. The current integration of RentalMan is to Vertex L v7.5. Vertex L is the client-based version.
We have a current project underway to migrate to Vertex L v8.0 with goal to complete in Q3/2024.

Vertex O is a cloud-based solution that performs similarly to Vertex L. The primary difference between the two versions is the location of the transaction. Vertex O, being cloud based, has each transaction processed via API. It has similar capabilities for managing exceptions and overrides for certain products and jurisdictions.

Alternatives to Vertex. Periodically, the question is asked if there are alternatives to Vertex. Avalara is one alternative with similar capabilities. With more than 20 years of integration with Vertex, changing to another solution would be time-consuming.

Simplifying Customer Taxes and Ancillary Fees

ANCILLARY FEES

As more and more taxing jurisdictions attempt to find ways to raise revenues without raising sales taxes, we find there are many types of ancillary fees to manage.

Several are required, either by government or by the business; others are optional. Fees often help to offset expenses incurred within the business. Many are generally accepted in the industry by customers. The percentage or flat rate charged varies by region of the country.

What types of fees do you typically charge?

Managing these fees within RentalMan is sometimes tricky. Applying them by jurisdiction, customer, type of customer, and type of transaction are just a few ways to consider.

Simplifying Customer Taxes and Ancillary Fees

CERTIFICATES OF INSURANCE

Managing certificates of insurance (COIs) is essential for businesses, particularly those that work with contractors, vendors, or partners who need to provide proof of insurance coverage. Here's a guide on how to effectively manage certificates of insurance:

1. Establish a Centralized System: Implement a centralized system to manage and track certificates of insurance. Consider a digital database, document management system, or COI tracking software.
2. Standardize Requirements: Define standard requirements for insurance coverage and documentation across your organization. Clearly communicate these requirements to contractors, vendors, or partners to ensure consistency in COI submissions.

3. Automate Certificate Requests: Utilize automation tools to streamline the process of requesting and collecting certificates of insurance. This could involve automated email reminders, online forms, or integration with vendor management systems.

4. Verify Authenticity: Verify the authenticity and accuracy of contractor, vendor, and partner COIs. Ensure that they meet your organization's requirements and are issued by reputable providers.
5. Track Expiration Dates: Monitor the expiration dates of certificates of insurance to ensure that coverage remains current. Set up alerts to notify stakeholders when COIs are due for renewal.
6. Renewal Management: Establish a process for managing COI renewals, including timely follow-up with contractors, vendors, or partners to obtain updated certificates before expiration dates.
7. Document Storage and Organization: Store COIs securely in a centralized location, organized by

vendor

or contractor name, coverage type, or expiration date. This facilitates easy access and retrieval of COIs when needed.

8. Compliance Monitoring: Regularly audit and monitor compliance with insurance requirements across your organization. Identify any gaps or non-compliance issues and take corrective actions as needed.
9. Risk Assessment: Evaluate the insurance coverage provided by contractors, vendors, or partners. Ensure that coverage limits and types align with your risk management strategies.
10. Contractual Agreements: Include insurance requirements and COI provisions in contractual agreements with contractors, vendors, or partners. Clearly outline expectations regarding insurance coverage, COI submission timelines, and compliance obligations.

11. Training and Education: Provide training and education to relevant staff members on COI management processes, requirements, and best practices. Ensure that they understand their roles and responsibilities in the COI management process.

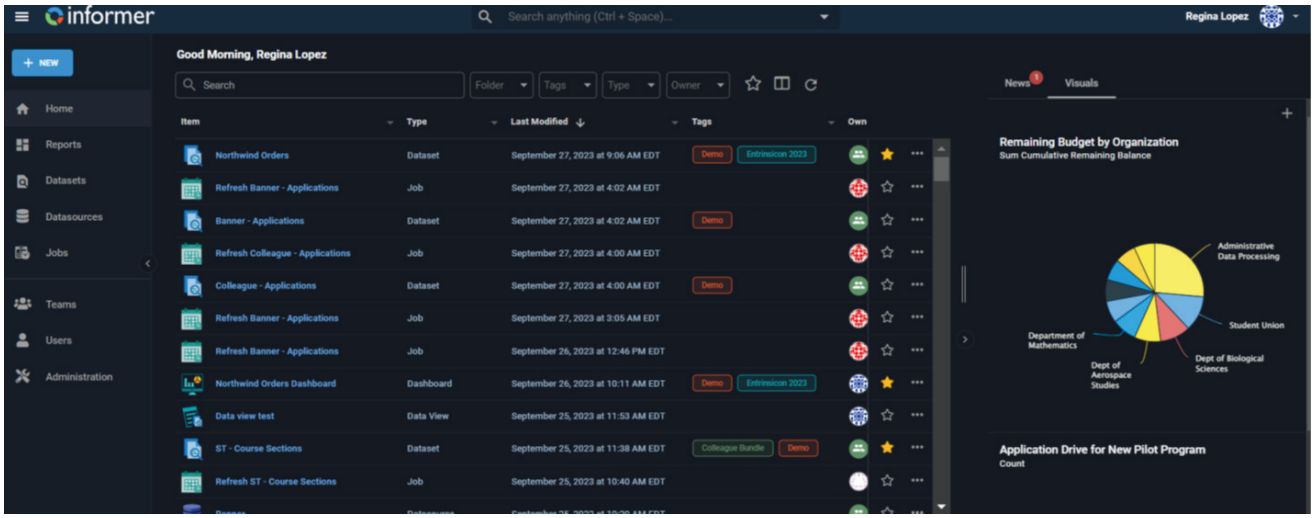
12. Continuous Improvement: Continuously review and improve your COI management processes based on feedback, lessons learned, and changes in regulatory requirements or industry best practices.
By implementing these strategies, businesses can effectively manage certificates of insurance, mitigate risks, and ensure compliance with insurance requirements across their organization.

Getting the Right Data to the Right People at the Right Time (Reporter 5 Overview)



Agenda

- About Informer 5
- Personalized Home Page
- Datasources
- Queries
- Discover Visuals
- Reports
- Jobs
- Security
- Live Demo



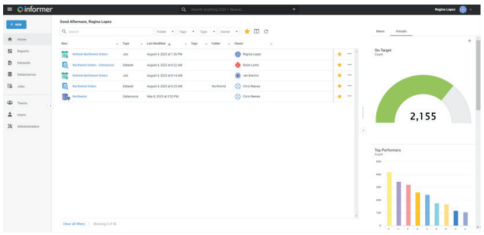
About Reporter 5

- Provide a single source of truth with relevant Datasets
- Cleanse and prepare data with Flow Steps
- Govern data with Team & Role-based security
- Explore & analyze data with filtering
- Create and interact with visuals
- Personalize user content and collaborate with Team members
- Publish content online or embedded
- Bring in custom resources with a flexible, pluggable architecture

Getting the Right Data to the Right People at the Right Time (Reporter 5 Overview)

InTempo R5

Personalized Homepage



- Modern look and feel
- All content now displays on Home Screen
- Easily switch between different areas of the system
- Search and filter all content
- See News Feed and Pinned Visuals
- Add New content
- New Breadcrumb bar makes it easy to navigate
- Customize Home Screen display
- See additional information on side panels
- List Pages for Informer content

InTempo R5

Datasources



- SQL Databases
  - Multiple options available
- U2 Databases
  - Databases using multi-level data structures
- Web Datasources
  - Connect to external web-based tools
- Workspaces
  - Collection of one or more CSV files

Define Mappings

Connect disparate sources of data

Create links within and between Datasources

Define security around Datasources
- Restrict sensitive fields
- Define Mapping Sets
- Determine level of access

Datasource can be owned or shared

InTempo R5

Queries

Pull data from one or more Datasources

Queries are made up of Fields and Criteria

Fields = fields on a SQL table or U2 file
Criteria = where clauses to filter data to smaller number of rows

Flow Steps

Post-query steps used to prepare, augment, cleanse data

InTempo R5

Queries

Types of Queries

- Datasets
  - Persisted results refreshed on demand or on a schedule
  - Promotes data governance – one source of truth
  - Used to build Informer content
  - Reduces load on database
  - Filters can be used to pare down data
- Ad hoc Queries
  - Temporary results
  - Query database every time
  - Same as I4 reports (if migrated, I4 reports become Ad hoc Queries)
  - Filters can be used to pare down data
  - Can be converted to Dataset

InTempo R5

Discover Visuals

Discover feature automatically creates Visuals for you

- Select a field, or group of fields, and let Informer do the work
- Lots of chart options
  - Pie, Bar, Column, Area, Spline, Trend, Maps, Pivot Tables and more!)
- Interact with visuals
  - Filter, configure, drill down, Pivot by, Change chart type
- Share
  - In Informer or via URL/Embed
- Visuals can be saved

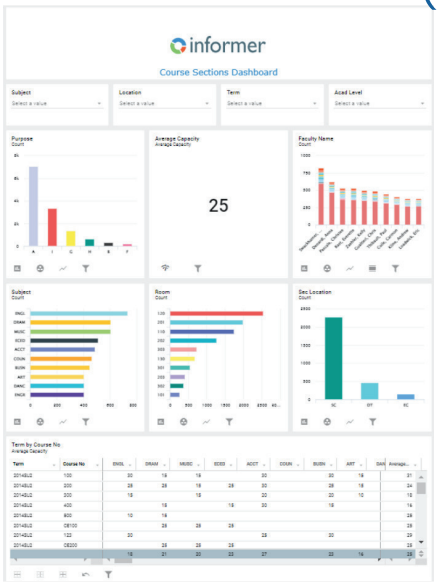
Create Visuals yourself

Getting the Right Data to the Right People at the Right Time (Reporter 5 Overview)

Reports

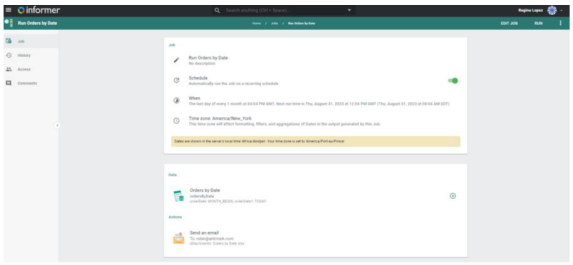
Report types

- Ad hoc Query
  - Real-time temporary query
- Dashboards
  - Customizable layout of Visuals
- Comparison Board
  - Side-by-side comparison
- Data View
  - Grid view of a Dataset, which can also include filter(s)
- Templates
  - Customizable format for viewing and exporting data



Jobs

- Task or collection of tasks to be executed
- Can be automated using recurring schedule or on demand



Main components:

Data
Dataset or Ad hoc Query

Actions
Email, Email burst, Save to file system, SFTP

Schedule
Specify recurring schedule

Security

- **Teams and Users security model**
- **Teams model your organization structure.**
- **Users are Members of Teams with assigned Roles.**
- **Roles determine the level of access**
- **Data Governance**
  - Single source of truth
  - Transparency
  - Traceability
  - Secure access to content

Teams and Users allow you to:

- ✓ Define ownership
- ✓ Share content
- ✓ Control access to sensitive information
- ✓ Custom access using Mapping Sets
- ✓ Content can be owned or shared

Users can come from:

- ✓ Local Users
- ✓ LDAP/Active Directory
- ✓ SAML (SSO)

Laying the Foundation for Your Reporter 5 Migration



Migrating to Reporter 5

Tony Tye:
Product Manager, InTempo Software

Chris Kennedy:
Project Manager, InTempo Software

Randall Williams:
Director of Informer Training and Curriculum Development, Entrinsik, Inc.

Migration Strategies

There are many ways to approach the migration.

- Mimic Reporter 4
- Leverage Datasets
- Start Fresh

Mimic Reporter 4

- **Use I5 just like you do I4**
- **Migrate Data Sources, Mappings, Links and Reports**
- **Migrated reports will be Ad hoc Queries in Informer 5**
- **Consolidate reports by selecting more data**
- **Apply post-query filters to pare down data**
- **You do not need to make multiple copies of a report**

Laying the Foundation for Your Reporter 5 Migration

Leverage Datasets

- **Combine I4 and I5 functionality**
- **Migrate Data Sources, Mappings, Links and Reports**
- **Optimize reports migrated and convert to Datasets**
- **Use Datasets to build reports, like Dashboards**
- **Use post-query filters**

Start Fresh

- **Migrate Data Sources, Mappings and Links only**
- **Create all Queries from scratch (either as Ad hoc or Datasets)**
- **Leverage post-query filters**
- **Leverage Datasets to create less queries**
- **Use existing I4 report as a guide to create I5 query**
- **Good practice to learn I5**

Best Practices

- Run each version of Informer on a separate server
- Upgrade I4 to the current version
- Clean up I4 and run audit reports before migrating
- If migrating reports:
  - Do not convert everything from I4
  - Create an inventory of reports to convert
  - Add migration tag to use when building package
  - Meet with users to discuss and prioritize
  - Use Data Gathering Workbook to track reports to migrate
  - Choose a few reports to start – you can add more later
- Review security and define Teams and Roles
- Validate reports after migration

We will install a package of Informer 4 Reports to Audit Report Activity:

•Launchaudit Report
•Live Excel Access
•Dashboard Access
•Informer Report Modifications
•Informer Schedule Report Errors
•Schedule Email Error Audit
•Average Report Execution time
•Reports that haven't run since a date

Notes on Live Excel access:
•Reports built on the LAUNCHAUDIT table on Informer 4.7.0 and higher can be filtered for Live Excels (add the SOURCE field).
•If you are looking specifically for the last time Live Excels were run, you can see that here: Admin > Direct Link. You can sort by "Last Accessed" OR run the packaged "Live Excel Access" report.

Migration Steps

- Install Informer 5 (we help you!)
- Additional Setup for Databases
- Setup Security – User and Teams
- If migrating reports:
  - Create package from I4 and download
    - Datasource/Mappings/Links
    - Package reports with Migration tag
    - Import package and validate results
    - Recreate Live Excels (they do not migrate)
    - Recreate I4 Dashboards (they do not migrate)
    - Recreate I4 Schedules as I5 Jobs (they do not migrate)
- Design and build new Datasets
- Design and build new Reports
- Share Datasource and Queries to Users/Teams
- Train end users and develop documentation

TRAINING
& CONSULTING

Customized Training

Online Training Series – By Entrinsik University

Onsite Training

Professional Services

Request Training, Consulting, or Be Put on the Migration List - Contact:

Tony Tye, Product Manager, InTempo Software - anthony.tye@intemposoftware.com

Chris Kennedy, Project Manager, InTempo Software - chris.kennedy@intemposoftware.com

What's New in Payments?



Curbstone is more than a payment processing company. We provide our customers with SaaS technologies that solve their most pressing challenges.

Process over 5 billion dollars in transactions annually

Year	Transaction Count	Dollar Total
2021	9,862,941.0	$4,991,949,658.38
2022	10,308,794.0	$5,295,736,375.34
2023	11,181,940.0	$5,766,410,242.05

99.99999% uptime over the past 3 years

PCI Certified

- SP-DSS - Service Provider Level 1
- PA-DSS - Payment Application
- QIR - Integrator

Authorized Reseller

Dejavoo
Payment Software Solutions

Optimize Security

Curbstone takes your **entire existing infrastructure**

OUT OF PCI SCOPE

- Curbstone C3 Portal - Remote tokenization ensures your systems never store credit card numbers, expirations, etc.
- Curbstone payment interfaces isolate sensitive payment information



Cost Savings

We help you save money by:

- **Reducing fee downgrades**
- **Reducing chargeback risk**
- **Unlocking exclusive "group" processing rates**

Savings Summary: Customer A : **$35,421.14** ~$106,000 / year

Month	Previous	Curbstone	Fee Savings	% Savings
August	$21.486.32	$12,604.34	$8,881.98	41.34%
Sept	$22,308.75	$13,029.61	$9,279.14	41.59%
Oct	$22,762.50	$13,622.87	$9,139.63	40.15%
Nov	$19,754.59	$11,634.20	$8,120.39	41.12%

Savings Summary: Customer B **$78,230** ~$234,000 / year

Month	Previous	Curbstone		Fee Savings	% Savings
Oct	$2,672,373.16	2.79%	2.85%	-0.06%	-$1,603.42
Nov	$9,479,385.25	2.79%	2.85%	0.17%	$16,114.95
Dec	$7,382,145.13	2.79%	2.85%	0.27%	$19,931.79
Jan	$8,420,556.39	2.79%	2.85%	0.52%	$43,786.94

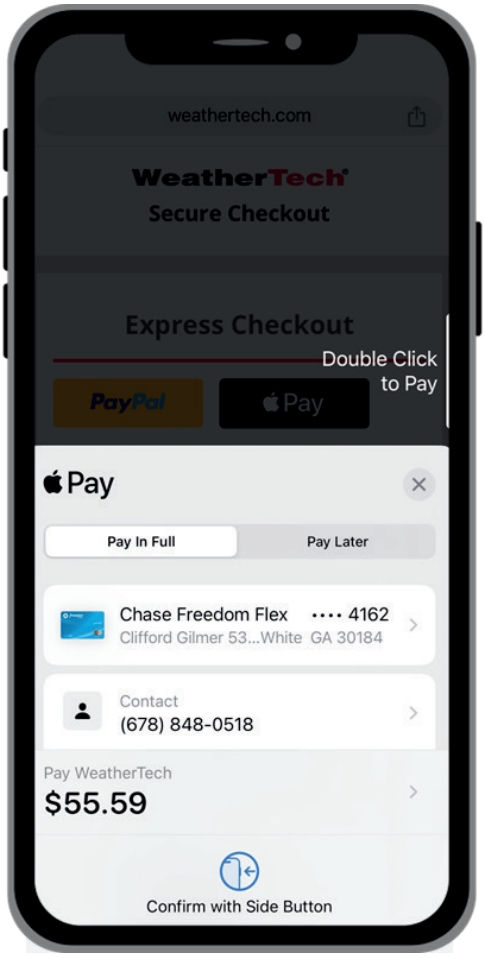
Maximize Integration

Curbstone maximizes efficiency and simplifies your payment processing with real-time integration to

Rental Man

New Features

- ApplePay for Retail and E-commerce
- Customer Portal Payments
- PLP for MOTO
- ACH (Coming Soon)



Curbstone Integrated Terminals

One Android kernel for all terminals -
supports all stand-alone and semi-integrated features and functions.

QD1

Rigid Wireless

- 4G, WiFi, Bluetooth
- 2D zebra scanner
- FP biometrics
- Replaceable battery
- 4" Touch screen
- Secure keyboard



QD2

Mobile Wireless

- 4G, WiFi, Bluetooth
- 5.5" touch screen
- E SIM world coverage
-
7.4V - 2600mAh battery
- All-In-One DejaPayPro



QD4

Desktop Terminal

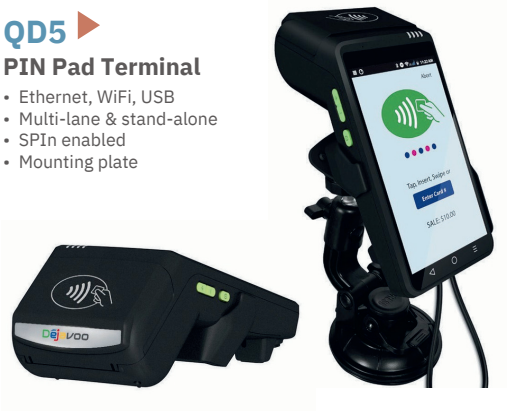
- Quad-Core @ 1.1GHz
- Ethernet, WiFi, USB
- Large touch screen
- 50 ft. paper roll



QD5

PIN Pad Terminal

- Ethernet, WiFi, USB
- Multi-lane & stand-alone
- SPIn enabled
- Mounting plate



QD3

mPOS Terminal

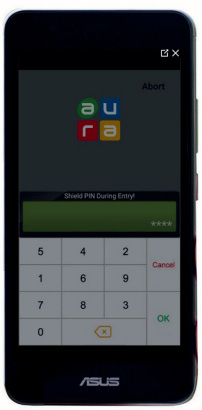
- 4G, WiFi, Bluetooth
- 4" touch screen
- Multi-unit charger
- Pocket size
- Insertion, MSR, contactless





Future Android Hardware

AURA plus Q2 Kernel for quick integration to future terminals



2024 / 2025 Roadmap

Customer Portal

Redesign the Customer Portal interface with increased integrations to RentalMan and additional integrations for customer payments. Expand reporting options for customers to utilize and schedule. Potential to add functionality to have customers manage their own jobsites.

InTempo Guide

Reimagine the delivery of learning materials with InTempo Guide.

Launching in Q2/2024, the new site will refresh and reorganize existing documentation while growing the base information available for new and existing customers. We recognize that RentalMan is not a "one size fits all" system and with thousands of control record options, there are many different ways RentalMan can be used – each of which will be highlighted through new how-to documents, video walkthroughs, and training aides.

InTempo Guide will be connected to Zendesk and have its own website.

RolePlay v3

RolePlay v3 is our standard and future user interface. We continue to enhance it with our partner, Advanced Business Link. Help us identify the next enhancements.

Core RentalMan Enhancements

The following are ideas discussed internally or with our customers but not widely used or not yet developed. Our goal is to identify which of these enhancements might be beneficial to your company and your customers.

Future Pickup / Dispatch File

Do customers often want to schedule the pickup when the contract is created? Even if the pickup is scheduled a few weeks or months in the future, it might be convenient to have a method to store the future pickup information and, when the date is reached, have the pickup record created and dispatched.

User Defined Billing (X Billing)

X billing is existing functionality. It provides the ability to define “odd” billing schedules for those special customers who have a need for non-traditional 28 day, 30 day, end of month billing schedules.

Equipment Not Available / Dashboard

This RentalMan-based dashboard provides a different view of equipment based on what is down, how well it is utilized, and what needs to be done to get the equipment back online.

Ability to Support Sales Reps by Line of Business for Same Customer

Provide the ability to have different sales reps assigned to an individual customer or customer job. This function could be used differently from split reps to have a line of business selected for a customer or region/district.

Managing Certificates of Insurance

How difficult is it to manage Certificates of Insurance (COIs)? Develop the ability to manage documents and notify your internal team and customers when getting close to COIs expiring.

Dynamic Rates

What are best practices for keeping up with rates in your marketplace? How sensitive to price changes are your customers? With what frequency are changes made? Discover existing functionality and integrations related to rates management.

Integrations

Fuel Management

Integrating with Fuel Management software lets you track fuel usage for equipment coming off rent and for sales and service vehicles. The ability to accurately track fuel dispensed reduces the likelihood of not billing customer for fueling on return.

Target is using software called Fuel Drive, which is a solution from AssetWorks – a sister company of InTempo. Driven by APIs with a device on each fuel pump, data would be gathered and sent to RentalMan to be applied to the contract entered or expensed if an internal vehicle.

InTempo CTx (powered by Wise Systems)

The overarching idea is to offer InTempo customers an innovative logistics solution specifically crafted for the equipment rental industry. This solution aims to seamlessly integrate with customers' ERP systems, establishing them as the single source of truth. Utilizing the latest technology stack, the system ensures real-time integration and allows customer-led integration and a user-friendly interface. With a focus on simplicity in user experience, the concept includes features such as route optimization, load optimization, rental optimization, machine learning, and GEO location-driven scheduling.

InTempo Mx

While InTempo MX launched in mid-2023, more enhancements are on the way. Developing support for additional services, enhancing the MX platform, and identifying more data points to connect between RentalMan and MX are the next tasks in queue. The roadmap provides the ability to have our customers' customers access the platform, track equipment, monitor geofences, and request pickups.

Machinery Trader / Sandhills

Looking to sell equipment via Machinery Trader? Reduce the time and frustration of managing in two places by sending files to Machinery Trader based on RentalMan "for sale" flag. Once the equipment is sold, the integration process sends a "deactivate" flag to Machinery Trader to take it off the site.

Texting Notifications

All of us are used to getting notified in our personal lives for doctor's appointments, home deliveries, or other activities. In what ways does text notification make sense in the rental industry?

Aside from delivery and pickup information, does it make sense to text customers when equipment is due off rent? How about when the damage waiver is going to expire? Texting special deals – using ability to target the texts based on specific criteria, like under-utilized equipment, to customers who frequently rent that type of equipment? Other ideas?

Pre-Lien Management

Identify and develop standard output that can be supplied to companies specializing in lien management.

Counter Operations

The concept is to create a single-screen approach to basic rental operations. Focusing on create/update rental and bringing all the primary options onto one screen, with the ability to visualize all the components of building a contract in one place.

What is Artificial Intelligence (AI) and Machine Learning (ML)?

Artificial Intelligence (AI) can be categorized into several types based on capabilities and functionalities.

1. Narrow AI (Weak AI): Designed and trained for a specific task or set of tasks. Examples include virtual assistants like Siri or Alexa, recommendation systems like those used by Netflix or Amazon, and autonomous vehicles.

2. General AI (Strong AI): General AI refers to a hypothetical AI system that has human-like cognitive abilities, such as reasoning, learning, and problem-solving across a wide range of tasks. It can understand, learn, and apply knowledge in various domains, similar to humans.

3. Machine Learning (ML): ML is a subset of AI that focuses on the development of algorithms and statistical models that enable computers to perform tasks without being explicitly programmed. It encompasses techniques like supervised learning, unsupervised learning, and reinforcement learning.

4. Deep Learning: Deep learning is a subset of machine learning that utilizes artificial neural networks with many layers (deep neural networks) to learn from large amounts of data. It has been particularly successful in tasks such as image and speech recognition, natural language processing, and autonomous driving.

5. Reinforcement Learning: Reinforcement learning is a type of machine learning where an agent learns to make decisions by interacting with an environment. It learns from feedback in the form of rewards or penalties, gradually improving its decision-making abilities.

6. Natural Language Processing (NLP): NLP is a branch of AI that focuses on the interaction between computers and humans through natural language. It involves tasks such as language translation, sentiment analysis, text generation, and speech recognition.

7. Computer Vision: Computer vision is a field of AI that enables computers to interpret and understand visual information from the real world, such as images and videos. It is used in applications like object detection, facial recognition, medical image analysis, and autonomous vehicles.

8. Expert Systems: Expert systems are AI systems that emulate the decision-making ability of a human expert in a specific domain. They use rules and knowledge bases to provide advice or solve problems in areas like medicine, finance, and engineering.

These are just a few examples of the diverse range of AI technologies and applications. As AI continues to advance, new types and subtypes may emerge, driven by research breakthroughs and technological innovations.

(This text was generated using ChatGPT)

RATE AND CREDIT APPROVAL PROCESSES

Credit Approval

Managing credit when a customer exceeds or is close to their credit limit poses various challenges.

Typically, if the decision is made to allow the customer to exceed their credit limit, the limit is

simply
increased. Perhaps the practice is to reduce the credit limit after the transaction is completed but practically the limit creeps up over time.

This link reviews an alternate approach to managing credit limit requests at a transaction level.



Rate Approval

Managing requests for approval of rates below either book rates or contract rates requires coordination and communication – typically outside of RentalMan. Optionally, not having required approvals allows counter and sales personnel to reduce rates without oversight.

What can be done?

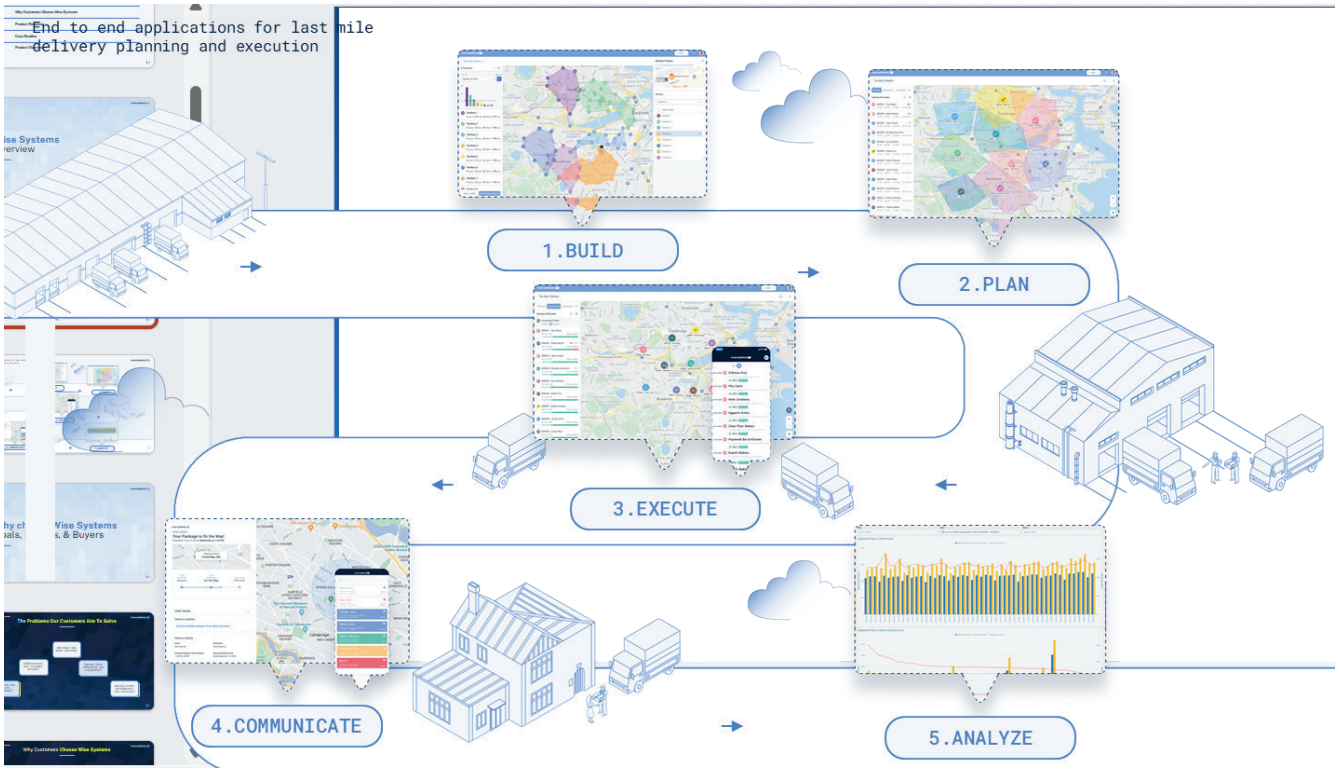
Using Rate Management through rate approval codes or through the rate approval queue provides the ability to track requests, approve or decline, and use the data to make adjustments to rate structures.



Less Wasted Time, More Efficient Routes: What AI-Powered Connected Transport Can Do for You

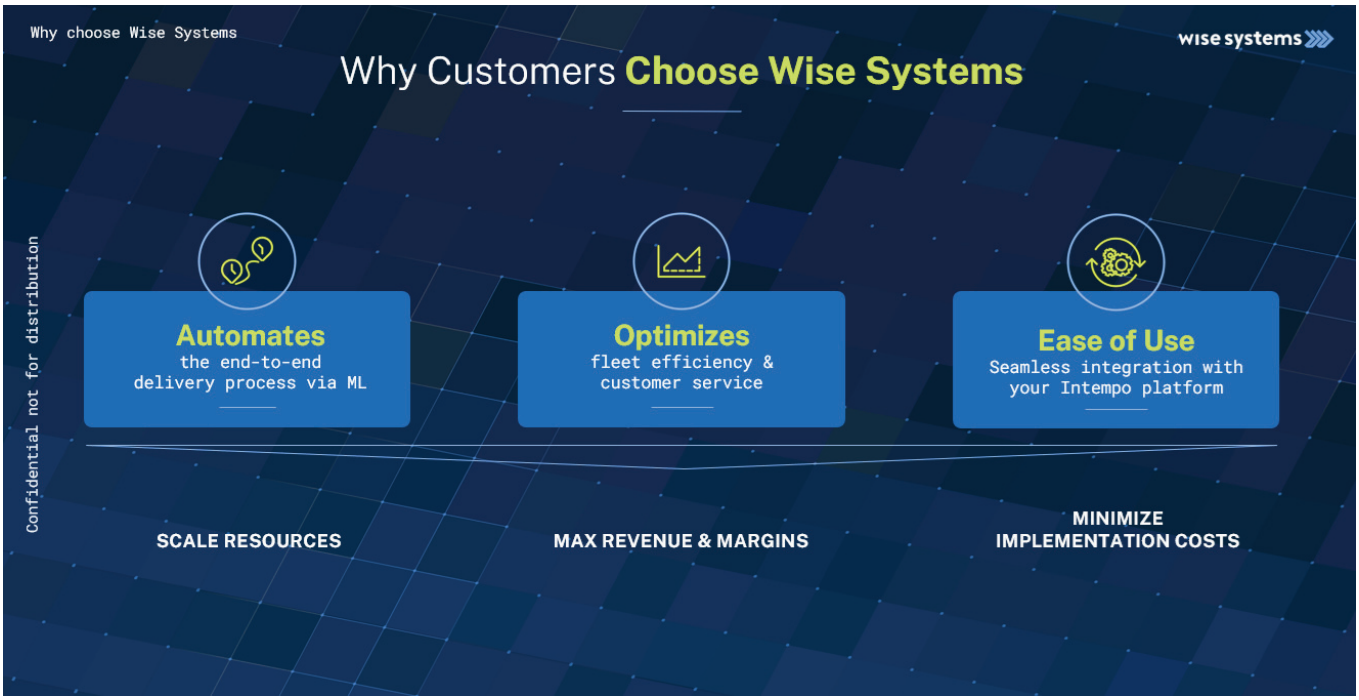


Less Wasted Time, More Efficient Routes: What AI-Powered Connected Transport Can Do for You





Less Wasted Time, More Efficient Routes: What AI-Powered Connected Transport Can Do for You



- **10-35%** reduction in manual route changes by dispatchers
- **10-20%** improved driver adherence to routes
- **30-45** minutes/day saved by drivers

- **50-80%** reduction in late deliveries
- **5-20%** reduction in miles driven
- **5-20%** improvement in asset utilization

Less Wasted Time, More Efficient Routes: What AI-Powered Connected Transport Can Do for You

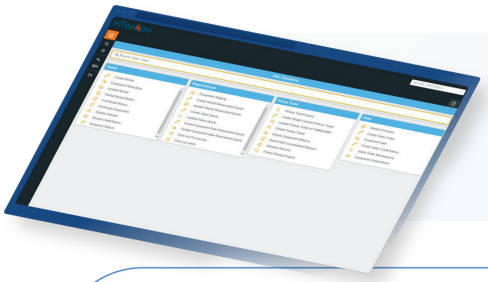
Product Roadmap

Phase 1	Phase 2
• Routing and Dispatcher Integration - **Route Planner** • Basic Route & Load Planning **- Dispatcher** • Sales Route **Strategic Planner** • Sales **Mobile Manager** • Basic Analytics - **Performance Manager** • Customer Notifications - **Customer Portal** • **Photo Capture, Signature - Driver/Dispatcher**	• Dispatcher Views Unfilled Reservation Management • Equipment Optimization • Sales Route Added Functionality • Customer Service Management • Enhanced Analytics (Rental Industry Focused) • Customer Service Request

March: SIG Group Launch for requirements gathering
April: Development Initiates
~June, 2024: Early Roll-Out

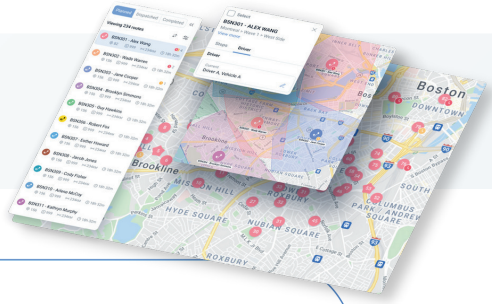
InTempo CT
Powered by wise systems

Connected Transport



>**InTempo** now has a Connected Routing, Dispatch, Driver App and Customer Notification solution

>Automate route planning to maximize fleet efficiency with **Route Planner**





>Monitor real-time delivery progress with **Dispatcher**

>Maximize service efficiency every step of the way with a interactive **Driver app**





>Keep your customer up to date on deliveries with accurate ETA with **Customer Portal**

Quick-Start Guide

The InTempo MX Quick Start Guide walks you through several core tasks, including:

- Subscribing to OEM Telematics Data Feeds
- Linking Assets from OEM Data Feeds to InTempo Equipment
- Creating Assets from the InTempo Equipment List
- Setting Up Outgoing AEMP Feeds to InTempo
- Creating Rental Yards as Sites
- Creating Additional Portal Users

Scan the QR code to download the entire step-by-step guide:

Use Cases

The InTempo MX Use Case Guide discusses multiple potential options for the following departments:

- Service Managers
- Executives and Sales Representatives
- Counter Staff
- Dispatch and Truck Drivers

Scan the QR code to download all the use cases:

InTempo MX General Session & Customer Panel



Agenda

Overall InTempo MX Program Update:
- LHP Telematics – Mike Jacob

Customer Use Case Spotlights:
- Black Diamond Equipment Rental – Oliver Herndon
- Vandalia Rental – Harold Goings
- ACME Lift & Ecco Equipment – Cara Hammar

Where Are We Going:
- InTempo MX – Tony Tye

A Use Case For All Departments:
- InTempo MX – Tony Tye

Panel Discussion

Within 24 months…

More than 50% of the larger machines that you purchase will include a connected asset solution from the manufacturer.

Connected asset functionality will be table-stakes for equipment rental companies winning new business. The end user needs integrated tools for improving productivity.

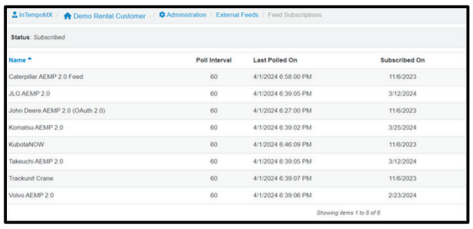
Construction safety & sustainability trends will increase the end-user's appetite for connected asset solutions to document compliance, such as idle reduction, etc.

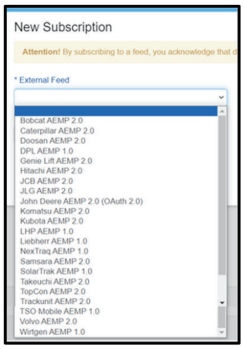
We began with data integration

- **Merge telematics information from manufacturers and after-market solutions to create a single view of your fleet.**
- **Merge the consolidated fleet telematics information with InTempo's customer contract information and work order schedules.**
- **Provide easy-to-use filtering to visualize your fleet and highlight exceptions that operations & service teams value.**

InTempo MX General Session & Customer Panel

Menu-driven options for merging telematics information from multiple sources



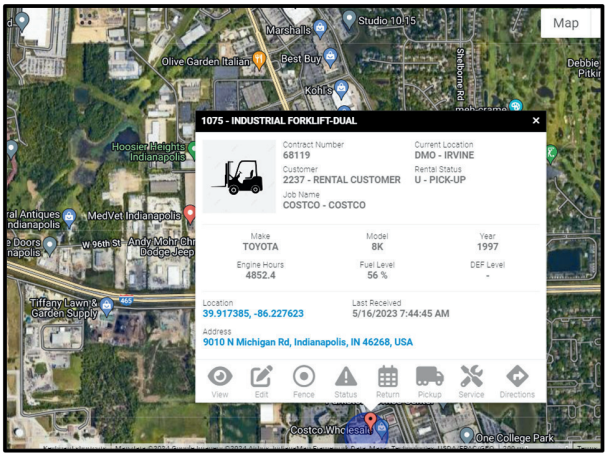


Where are we now?

Moving beyond data into actionable fleet information, InTempo MX introduced fleet views that highlight….

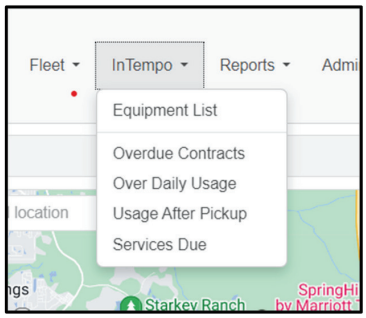
- **Equipment due for service**
- **Machine usage after being called off-rent**
- **Excessive usage**
- **Equipment overdue for return**
- **Equipment scheduled for pickup**
- **Monitoring special use equipment performance**
- **Equipment on-rent, but in the yard**
- **And many other use-cases ……**

Visualizing equipment location, rental status, and exceptions



InTempo MX General Session & Customer Panel

Pre-configured views that address operational use cases



Contract #	Pickup Date	Usage Hours
302206	2024-03-20	1.98
304517	2024-03-25	0.50
301577	2024-03-25	0.40
303102	2024-03-22	0.40
304971	2024-03-22	0.33

Specialty Equipment Monitoring and Multi-Conditional Alerts

54328	HTE_COMPRESSOR_DISCHARGE_TEMP
54331	HTE_COMPRESSOR_FUEL_LEVEL_PERCENT
54333	HTE_DRY_SIDE_TRANSDUCER
54329	HTE_PICKUP_TEMP
54335	HTE_POS_FILTER_TRANSDUCER
54334	HTE_PRE_FILTER_TRANSDUCER
54332	HTE_WET_SIDE_TRANSDUCER
54330	INJECTION_TEMP
18541	J1939_100_ENGINE_OIL_PRESS
27513	J1939_105_ENGINE_INTAKE_MANIFOLD_TEMP
27526	J1939_110_ENGINE_COOLANT_TEMP

Where are we going?

- **Make it even easier to connect with OEMs and other aftermarket telematics sources**
- **Automate the process of extending telematics to the rental customer – gain a competitive advantage to win more business**
- **Continuously improve the user interface to increase adoption and address specific use cases.**

InTempo MX General Session & Customer Panel

In December, we said we were going to accomplish the following in Q1:

- **Pre-Configured Data Views**
- **Executive Dashboard (In Test)**
- **Specialty Equipment Monitoring**
- **API Enhancements**
- **Sub Customer Auto Creation (In Test)**
- **Added OEM Data Feeds**
- **Cummins Diagnostics Integration**

Over the next two quarters we'll be focused on:

Q2-Q3

- **Launch of MX Advisory Council**
- **Executive Dashboard (Roll-Out)**
- **Sub Customer Auto Creation & Auto Rent Down**
- **Customer Excess Usage Enhancement**
- **Mobile Device Display Enhancements**
- **Continue to Refine dashboards and views to make them more valuable to Counter, Dispatch and Service staff**
- **Continued AEMP Additions**

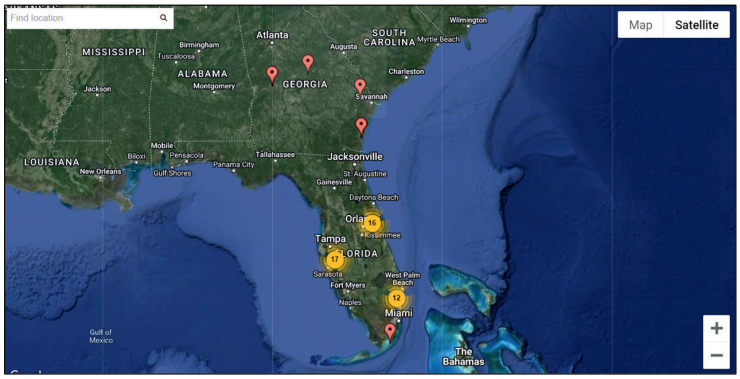
A Use Case For All Departments

- **Corporate Oversight**
- **Sales Managers**
- **Telematics Admin**
- **Fleet Managers**
- **Operations**
- **Service Managers**

InTempo MX General Session & Customer Panel

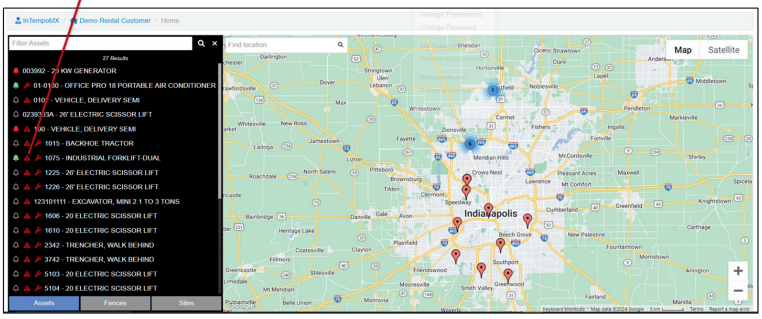
Branch Executives and Sales Staff
Distinguish Sales Territories You May Be Missing

When the page updates, you can zoom out on the map to see any potential areas where you do not have equipment, indicating territories that are not being pursued for that line of work.



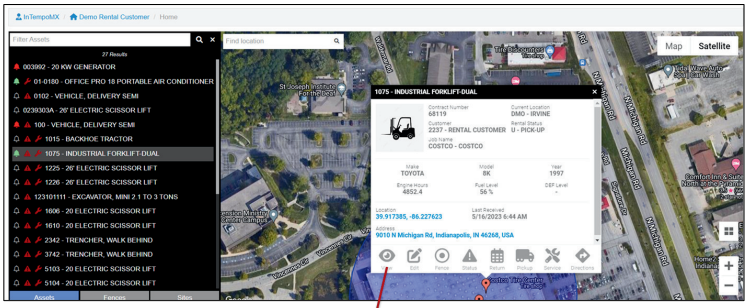
Telematics Admin

The red caution triangle Identifies a non-reporting asset, select to access the popup.



Telematics Admin

Last received date is displayed

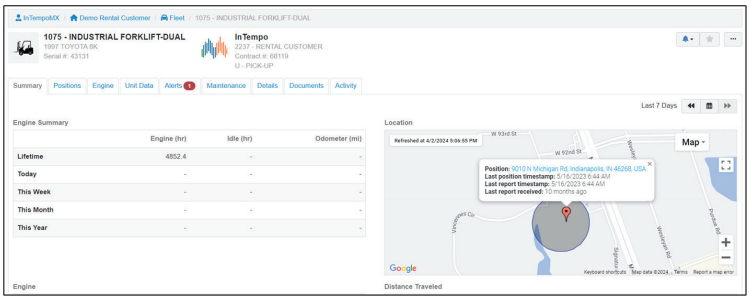


Drilling into asset to see more information

InTempo MX General Session & Customer Panel

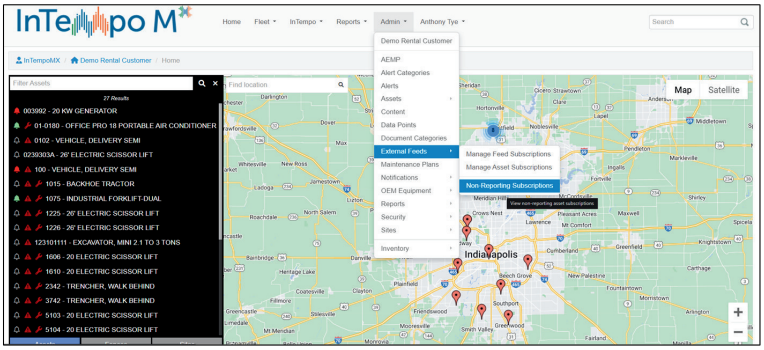
Telematics Admin

View more last reported info



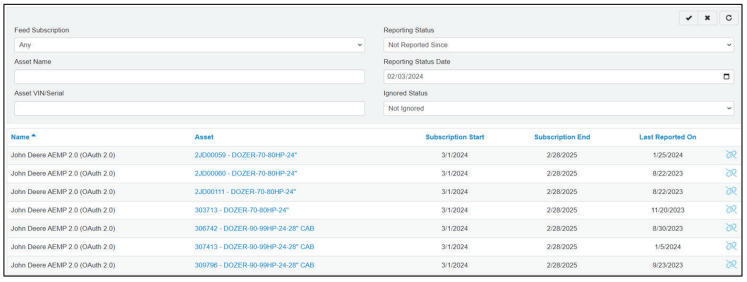
Telematics Admin

View non-reporting assets in report form for easy management.



Telematics Admin

Non-Reporting Subscription Report

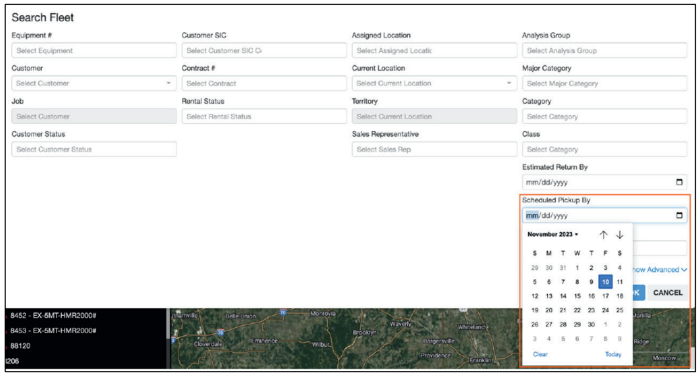


InTempo MX General Session & Customer Panel

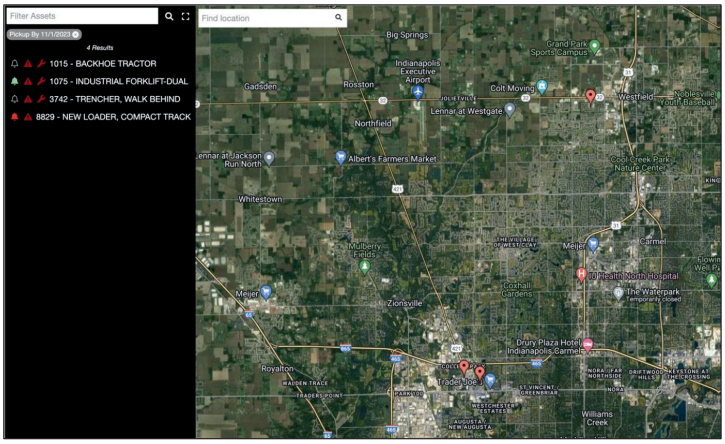
Counter Staff

One of the largest benefits of the InTempo MX portal for counter staff is the ability to quickly and easily find the information they are looking for when sourcing fleet.

Locate Equipment Overdue for Return



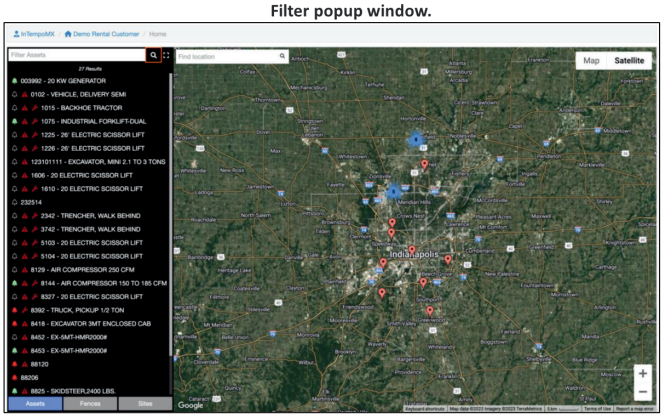
Locate Equipment Overdue for Return



Service Managers

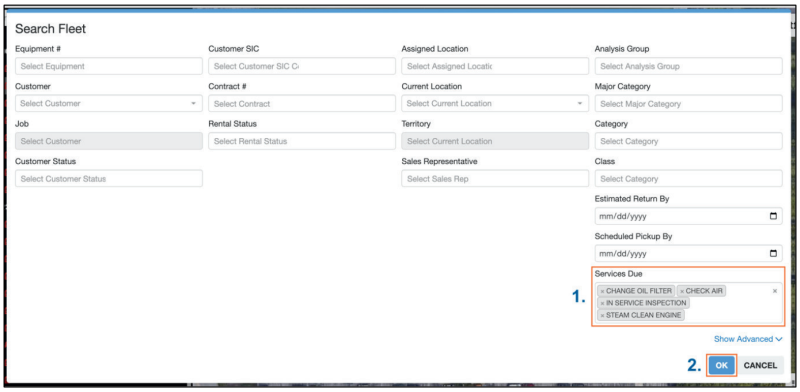
Locate Equipment Due for Service

It is important for service managers to be able to locate their equipment that is coming due for service. To locate them, click the magnifying glass on the Fleet Dashboard to open the Filter popup window.

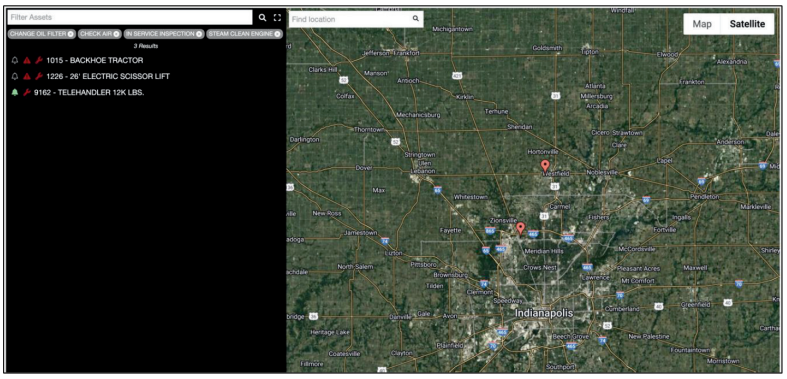


InTempo MX General Session & Customer Panel

Select a service plan from the Services Due dropdown menu in the Search Fleet popup window. You can select more than one service plan. Click OK.



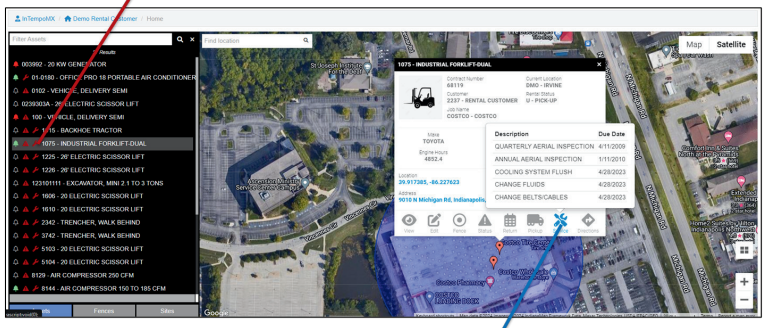
The dashboard will update to show the machines that are due for the service plans you selected.



InTempo MX

Service Group

Select the red wrench indicator to display the popup.



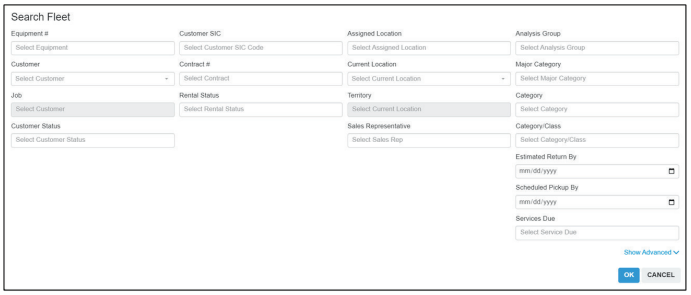
Select service icon to display services completed

Service

InTempo MX General Session & Customer Panel

Locating Down Machines Not at a Branch
Locate Equipment Due for Service
Locate Equipment in Pick-Up
Locate Equipment in Pickup with Service Due

Locate Equipment Overdue for Return
Distinguish Sales Territories You May Be Missing
Locate any Equipment on Short-Term Down Status
Source Fleet When Highly Utilized



Oliver Herndon
Corporate Service Manager

BLACK DIAMOND EQUIPMENT RENTAL
833-BD-RENTS

- ❖ **Exception Reporting?**
- ❖ **Benefits of Actionable Information?**
- ❖ **Where Is The Value InTempo MX?**
- ❖ **Exception reporting to improve operations**
- ❖ **Exception reporting to improve telematics**

Exception reporting?
- ✓ People are great! … But ….
- ✓ What happens when you are only 90% correct?
- ✓ What happens when you are 99% correct?
- ✓ What happens when you have thousands of assets, contracts, telematics devices, etc.?
- ✓ How do you efficiently and effectively find the exceptions?

Benefits of Actionable Information?
- ✓ Cost savings.
- ✓ Improved customer satisfaction.
- ✓ Increased profitability.
- ✓ Understanding the impact of previous decisions.
- ✓ Making better future decisions.
- ✓ A better work environment for team members (might even improve employee retention!)
- ✓ Growing with our customers.

InTempo MX

Where Is The Value in InTempo MX?

Integration of all telematics and our ERP system.

Improve profitability by increasing efficiency and decreasing costs.

Provides visibility.

Telematics → Trackunit, Geoforce, and OEM (JLG, Yanmar, Takeuchi)

ERP → Rental Man

Future Telematics → TP-1 → 4- and 5-digit codes (and perhaps the Holy Grail of pre-diagnosis!)

Exception reporting to improve operations

Filter! Filter! Filter! → Makes it easy to see on a map what is out of place!

Examples: (Sky's the limit!)

1) **What's available for rent not physically located in the yard? (Not on contract.)**
2) **What's on pickup too long? (Out of sight out of mind.)**
3) **What's due for service and rental status available? (Not rent checked properly.)**
4) **What equipment is being operated when on pickup? (Customer should be charged.)**
5) **Are there "freebees" out there that we don't know about? (These should all be on contract.)**
6) **Are the job locations correct on the contract? (Especially, oil and gas sites.)**
7) **Are the lube technicians avoiding servicing the larger equipment? (Just doing easy light plants.)**
8) **Is one sales representative leaving his equipment on pickup longer than others?**
9) **Did the lube technician cover the assigned territory?**
10) **Quickly identifying misplaced and stolen equipment!**
11) **Spotting the wrong customer on the contract!**
12) **Assisting our customers to spot their exceptions!**

Each of these answers can be obtained in SECONDS and all have a direct impact on performance!

And, when you drill down to the equipment level, all the information is on the card!

InTempo MX

Exception reporting to improve telematics

How do you see/know that your telematics are working properly?

Good information leads to good answers, but unfortunately, the converse is also true!

Bad information leads to bad answers.

InTempo MX with all its downloadable reporting tools is much faster, more efficient, and more effective than any telematics platform to determine non-reporting units!

Here's the gold nugget!

By using InTempo MX to audit your telematics, not only do you improve your telematics, but you vastly improve operations!

(And all telematics platforms fail because how will they know if that telehandler in your yard is down or available for rent … BUT .. InTempo MX does 😊)

Cara Hammer
Director of Product Support

ECCO
ACME

- **Fences**
  - **Asset Type Fences**
  - **Site Type Fences**
  - **Use of Fences / Benefits of fences across different businesses**
- **Reports**
  - **Ease of report creation**
  - **Benefits of adding InTempo Enterprise information to GPS reports**
  - **Usage after Pick Up**