



Alert EasyPro v19 Features List:

Counter Features

Added a parameter to set the default Ticket Type (Bid, Reservation, Contract) for new tickets

The rental equipment search screen can filter items shown to only those items owned at this store

Changed both the Related Items Screen and the RC Search Screen to show all 50 characters of the RC Name

Added the ability to display calendar availability for Individual items

Developed a new usage screen to replace the old 3 screens: Usage Here, Usage All, Usage No Date:

- Added the ability to display usage to any stores or all stores
- Added show usage based on a date range
- Added to sort by
 - Item status out/pickup/late
 - Out/in date
 - Region (for bulk items)
 - Fixed asset number and serial number for individual items

Dynamic Kit discount no longer built in the override rate but shows discount separately (Early release in 18)

Simplified the Reservation Cancellation process to automatically apply deposit to reservation cancellation fee. No longer requires deleting payment. (Early release in revision 18)

Simplified the Reservation Confirmation process by giving access to the Confirmed button in the Payment screen

Unconfirmed reservations are shown with a small 'r' while confirmed reservations are displayed with both a capital "R" and a check-mark in the Delivery/Pickup board

Show Bill thru date for cycle billing on ticket main screen. (Early release in v18)

Added Keyword Search for customers

Added time stamp to ticket note screen (Early release in 18)

Added location stamp to ticket log screen (Early release in 18)

Added the ability to have subdirectories within Attachments

Allow the Operations Printer to use Printer Groups (for change tickets, cash payment report in closeout, QuickCheck list, etc.)

Attachments & Safety Notes now print on all ticket statuses including bids

Improved description of why an item cannot be rented when selecting an item at the counter

Delivery/Pickup Board

- Added 2 more colors to help filter each day more precisely
- Renamed “Orange” as “Yellow”
- Add a confirmed flag to the Delivery/Pickup Board

Added new Historical Cycle Billing report

Added new Projected Billing report

Added new Bid Conversion Rate report (Early release in v18)

Added a new parameter to Open Contract reports to filter for Missing/Broken/Sold or all

The Counter Exceptions Report can now be run and scheduled by location

Fixed the Regional Overbooking Report

Dashboard Features

Added a Deleted Tickets tab on the Counter Operator Dashboard

Enhanced the Fixed Asset Operator Dashboard section by adding 2 additional tabs:

1. Fixed Asset tab (which allows you to list all equipment, Individual and Bulk, that is Current or Down for Maintenance)
2. Assets on Open Tickets (which includes all ticket types. (NOTE: Is supposed to “Give access to calendar availability based on ticket out/in dates” but does not currently appear to work)
3. Allow search by rental class, assets (RC#+FA#), group, or serial number
4. Keyword search works on Fixed Asset, Assets on Tickets and Fleet tabs of Operator Dashboard

Added a Sales Items Tab to Operator Dashboard

Access to an enhanced Delivery/Pickup Board within the Dispatcher Dashboard:

- Dates are on vertical scroll bar for quicker access
- Display defaults to Delivery/Pickup only but Will Calls can be added with a single click
- Dollar totals can be suppressed through a Codes/Setup parameter

Added the ability to track trucks by location in Dispatcher Dashboard

Staff can be Activated/Deactivated, assigned to a location, assigned as a vehicle’s driver, and can be “partnered” into teams

Added new visual cues to help color-blind Dispatch staff

Added new visual clue when using dispatcher dashboard, if a ticket has its out and in dates changed, but that ticket has already been put as a stop on one or more routes, in case the highlight on the first item hides the highlighting

Updates to Customer page of Operator Dashboard for highlighting, tab & function keys, and keyboard issues

Added default printers for tickets and reports in Dispatcher Dashboard (Early release in 18)

Document Center Features

Added a new report to show all the statements submitted for processing. (Early release in 18)

Added a new store parameter to show/hide “!Transfer” Tickets within Document Center

Back Office

Customer File Maintenance

Changed back-posting of closed tickets to be posted to user-selected posting date

Keyword search for customers (at both counter & customer file maintenance)

New Average # of Days to Pay and Average # of Days Open for Unpaid Invoices Reports

Add access to the GL reports (from the counter screen) to the customer AR/Financial pulldown

Can access to the AP Notes from within payment processing

Redesigned the debit memo screen to include the AP Notes

Allow un-applying a check, even if it's from another location

[Note: It also logs a message in Codes and Setup in the Change/Delete logs that the allocations have been deleted.

If the allocation was done before the last GL export, it will give you a warning. Alert uses the check allocations to decide GL details when you export the GL, and if you export your GL, and then un-apply the check, those GL details that were exported before don't get “undone”. So, when you go to redo the allocations, those allocations will show up on the next GL export.]

Developed an interface for web based version of QuickBooks that allows selection of fields to be exported

Rental Class File Maintenance

New feature to set RC#'s to not create availability records

Copy rates to all stores when adding a new item. (Early release in v18)

Added additional filter to the rental item search screen to allow search for kit headers or metered items

Fixed Assets File Maintenance

Sort Fixed Asset Sold records from newest to oldest (Early release in v18)

Can now filter “Last Rented By” list by location

Advanced Modules

Work Order

Developed a 2 pass work order for to generate more complex forms

For example, labor and parts can be listed below the work type they belong to with a total for that work type (Requires professional services fee for work order form changes)

Purchase Order:

Added Expensed purchase orders for non-inventory purchases (Early release in v18)

Broke out fees into fees for items received and fees for item yet to be received

Added the ability to create a PO from a CSV file (requires a specific CSV layout)

Customer Import/Export:

Changed customer import to allow selection based on Customer ID, not just Customer Key

SubRental:

Added a print button to SubRental/Overbooking screen

Update the Sub Rental handling of generic bulk rental item

Shows user-entered rental item description, allowing multiple sub rental for the same vendor for the same rental class for the same dates (Early release in v18)

Allow the Operations Printer to use Printer Groups (change tickets, cash payment report in Closeout, QuickCheck count lists, etc.)

Third-Party Integrations

EMV (chip card) processing & Level 3 credit card processing with Approval Code (Early release in v18)

CRM interface with Zoho CRM system (www.zoho.com/crm) (Early release in v18)

Rouse Analytics Interface

RFID implementation for counter processing system (Still in development)

Smart Equip Interface (Still in development)

New Add-On Modules

e-Commerce for Bids/Reservations: Allow web designers to develop a web-based E-Commerce system that generates a bid/reservation in Alert EasyPro automatically

Allows customers to write and make changes to reservations outside of a predetermined cut-off period

Requires minimum payments to complete reservations

QuickClose: Contracts checked in through QuickCheck ticket using barcode can automatically post an AR/FC payment if needed and close the ticket

Web-based time card system (Early release in v18)

Job Costing System (Still in development)
