

# Hire Counter - Basic

## Training Session Outline

### Description

This session is designed as an overview and introductory session of the main operational functions of the hire system. This session will provide participants with the competencies to manage customers and fleet, create and manage hire contracts and run reports. This is an ideal branch training session.

### What you will learn (Objectives)

- Lookup customer master records
- Lookup equipment master records
- Add, lookup, edit and manage hire contracts
- Basic functions within the 3 listed modules
- Basic reporting within the 3 listed modules

### What you need to know (Pre-requisites)

Before attending this session, participants must have completed the Baseplan Enterprise - Orientation session and must be reasonably proficient with MS Windows. This includes confidence with use of the mouse and printing underneath Windows.

### Session content

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#### Introduction

- Presenter / Participants Introduction
- Learning Objectives
- General Housekeeping

#### Plant Ledger

- All equipment to hire must exist in plant ledger
- Plant Numbers
- Type, Category, Make, Model
- Hire and Service Status
- View hire history

#### Debtors

- Debtor Master
- Cash and Account Customers

## Hire Counter

- Using the wizard – create a contract (for cash and account customers)
- Add hire detail lines (with and without plant numbers)
- Add Sales detail lines
- Delivery and Customer pickup options
- Add deposits
- Associated Items
- Return items
- Using the Wizard – Finish a contract (for cash and account customers)
- Delete lines
- Cancel hire
- Duplicate contracts
- Progress Invoicing
- Cycle Billing
- Basic Reporting

## Conclusion

- Session Review
- Questions
- Training Evaluation Form

