

## From The Support Desk

By John Dunski



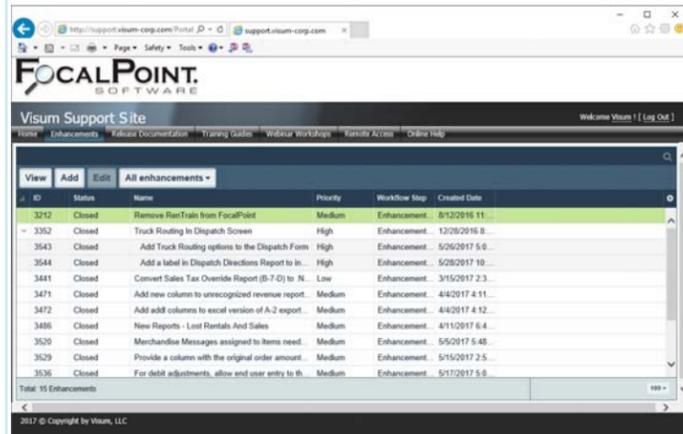
From Left to Right:  
John Dunski, Peter Im

While FocalPoint Software version 2.53 has certainly brought with it many new exciting changes, another exciting change at Visum is the addition of Peter Im to

our support team. Peter started working with Visum in May of 2017. He brings a strong analytical background coupled with a positive, friendly attitude. Peter has been a great addition to our Visum support team.

### New Visum Support Site

Soon after this newsletter is released, you will be receiving information about Visum's new support site. This new site will give you online access to support resources in a helpful, interactive format.



Included in this site will be:

- The ability for you to add and maintain your own enhancement requests. You can also monitor feedback from programmers, and receive emails as the status of the enhancements are updated.
- The ability to see all release doc, including all version, build and hot-patch documentation. From here, you can decide when you would like to update FocalPoint.
- Online training videos and recorded webinars
- A direct link to the remote access (FocalPoint OneClick) page
- The online help file system

We are excited to be able to offer this enhanced support solution to you. Watch for emails soon to learn how you can get started with Visum's new interactive support site!

("Backups" Continued from page 2)

If you choose to subscribe to an online backup service, we recommend that you work directly with the service provider on the best ways to configure their software.

If you need any help with finding your backup files, using the FocalPoint Server Manager, or learning how to copy and paste files from the server to an external drive, or if you simply want us to help you confirm that your backup procedures are appropriate, please do not hesitate to contact us.

## Programmatically Speaking

By Kirk Kanak

From left to right:  
Mike Goebel, Kirk Kanak



### New Reports in FocalPoint

What if you wanted to find a report with a keyword search, or search a report preview for specific information or directly e-mail a report to a co-worker? These and other enhancements are available in the new reporting function, #4 from the main menu.

The new reporting function is easy to use and offers a lot of options to filter, export, print, save and preview. It is standardized so that all main options can be used for any report. Reports also have their own individual options which are tailored for the reports. For example, most reports have input parameters for things like selecting date ranges, stores/regions (tiers), rate tables, rental items, etc.

There are three major parts in the report form. The top portion of the form is divided into 6 sections (Document, Print, Page Setup, Navigation, Zoom, and Export). These sections apply to all reports equally. Initially you will see most of the actions greyed out (disabled) but these will become available as appropriate when a report is displayed in the main report preview section.

The left-hand side of the form contains the list of reports available. Initially it lists all reports but you can limit this list in one of three ways. First, you can select a category of reports ("Daily", for example). Once selected, only the reports associated with the category are listed.

Select the category by either using the Drop Down immediately above the Keyword field or use the Reports icon on the top of the form.

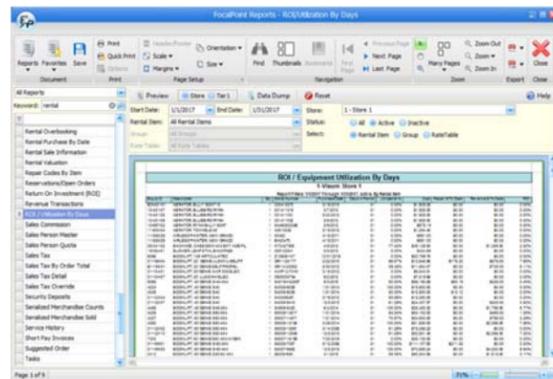
Another method for selecting reports is to use the Keyword field.

The final way to list reports is to use the Favorites icon. If you use certain reports on a regular basis, you can now save them as "favorites". To do this you just right click on the desired report and select "Save as Favorite". Then to list your favorite reports you just click on the down arrow on the Favorites icon.

The right-hand section of the report form is the report preview section. When this section is blue (empty) then either a report hasn't been selected yet or there is nothing to report. A message in the center of the section will let you know which is which. To preview a report, select the report wanted, change the report parameters as desired, then click on preview. Once the report is displayed you can use the options in the top sections to print, export, e-mail, save or find specific information in the report, etc.

The new report function is near completion. 87% of the current "legacy" reports have been converted, and ten new reports have been added.

This is only a brief introduction to the new reporting capabilities in FocalPoint. To learn more about these new reports, be sure to attend an upcoming webinar that will be announced soon.



### FocalPoint Quick Tip

Use the report order terms tab in the store manager file to customize the terms above the signature line on a transaction based on the type of transaction you are creating. You can have different terms for open and closed orders, quotes, sales, reservations, invoices, credits, and work orders.

# FocalPoint SOFTWARE

MAXIMUM Profits. MINIMUM Efforts. FOCUS.

2nd Quarter 2017

## Product Spotlight

Version 2.53

By Duane Erlandson, President and Co-Founder

### What's Inside

Page 2  
Product Spotlight

FocalPoint Backups

Page 3  
Using FocalPoint to its Fullest

From the Sales Desk

Page 4  
From the Support Desk Programmatically Speaking



FocalPoint's new front counter is now fully released, so I'd like to devote one more column to review the highlights of this new functionality. We also recently hosted and recorded a webinar on the new front counter functions. You should have received a link to view this recording, but if you did not, please contact our support desk for assistance.

Some of the highlights in the new front counter include:

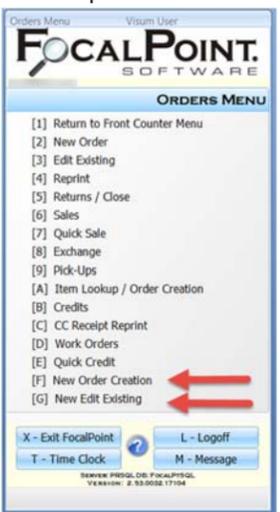
- The ability to re-assign customers within an order.
- The ability to start the return process from within an order.
- The ability to exchange items from within an order.
- Enhanced delivery / pickup dispatching within an order.
- Click-and-drag order line re-sequencing.
- The ability to scan documents and attach them to an order.
- Enhanced custom attachments that can be included

while printing or emailing an order.

- Ability to have multiple sessions open for both new orders and existing orders.

There are 2 new menu items on the Order Menu to access all of this functionality; "New Order Creation" and "New Edit Existing".

The New Edit Existing screen displays open orders, reservations and quotes. The ability to reprint orders, search for customer orders, display CRM notes, email, and find cycle billing sequences is included in this single screen. Drill down



("Spotlight", Continued on page 2)

## Customer Focus

Using FocalPoint to its Fullest

By Guy Reiersen, Vice-President and Co-Founder

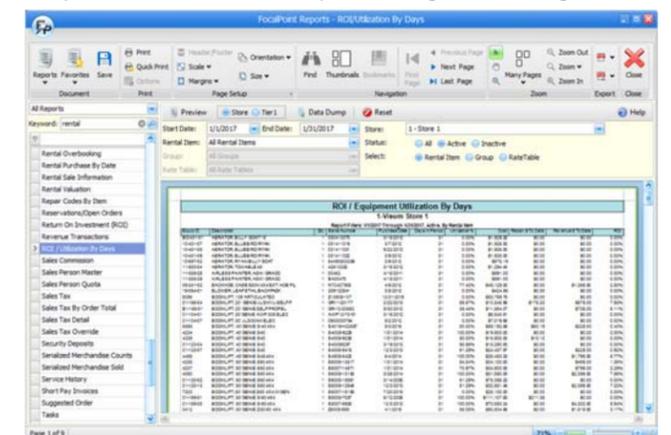


I would like to thank all of our customers for the growth over the years and for joining the Visum family. Not only has our customer base grown, but we've also added 3-staff members over the last year: Mike Goebel, Peter Im and Emily Winders. Mike is a programmer, Peter is a support representative and Emily is an inside sales representative. They all add much value to our Visum staff.

Here are some suggestions on how FocalPoint Software can add value to your operation:

**FocalPoint Remote Edition-Process Returns On-The-Go!** This new feature allows you to process a return away from your front counter making you mobile and not tied to your counter. Intuitive return screens allow you to search open orders to start a return. Once an open order is selected, items can be returned and meter/fuel charges can be applied.

You can process credit cards and capture the signature during the return.



("Focus", Continued on page 3)

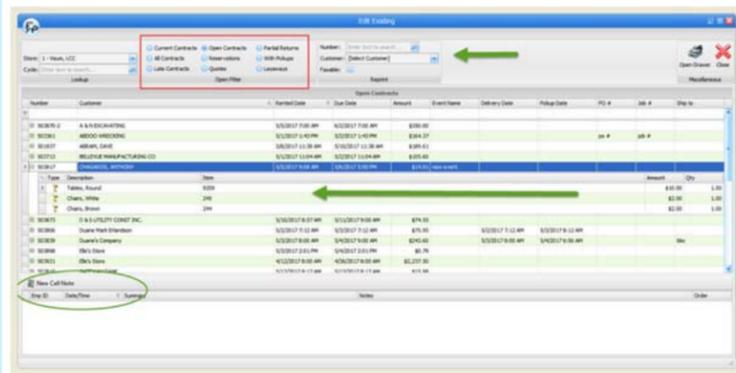


901 159th Avenue N.E. Ham Lake, Minnesota 55304 www.visum-corp.com 763.244.8050

## Product Spotlight Version 2.53

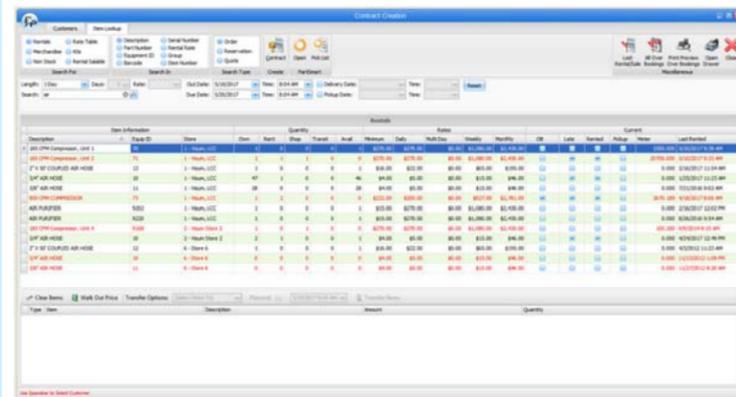
("Spotlight", Continued from page 1)

capabilities allow you to see line details for an order without leaving this screen.



In the New Order Creation screen, you can lookup up items (Rental, Merchandise, Rental Sales, Kits) and see the information needed to rent or sell these items. Enhanced features include:

- Ability to filter by column
- Display items not available in RED
- Ability to search for rental items by Rental Rate Description or ID
- Ability to re-size the screen
- Ability to see walk out pricing by Customer



## FocalPoint Back-Ups

Every FocalPoint installation comes with a "FocalPoint Server Manager" that is installed on your server. The FocalPoint Server Manager has a built-in backup function that backs up your FocalPoint database and associated files to the C:\FocalPt\Backups folder on your server. These backup files will not be automatically sent off-site, so if some event (theft, vandalism, water damage, fire, etc.) harms your server, then your backups will be of no use to you if they remain on the server. Your responsibility is to copy them from your server to some other external area so that they can be used for restoration in the event of a server malfunction.

If you do not see your backup files in the C:\FocalPt\Backups folder on your server, please contact Visum's support department immediately.

Here are some options that you can explore to copy your FocalPoint backups to an external area. Implementing multiple options is always a good idea.

Manually copy the backup files to a flash drive or external backup drive

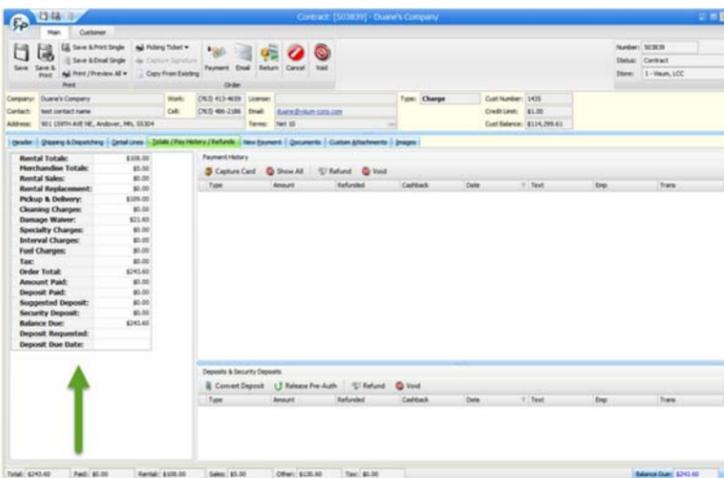
- Plug a small flash drive or external backup drive into your server. Copy and

- Display customers in RED that are on hold

Once a customer is selected, the ability to see the customer or authorized user will help you detect issues before they happen.

When adding rental or merchandise to an order, we have incorporated a "Quick Add" option so you can select item after item without stopping at an edit/review screen between items.

The Payments/Total screen gives all totals breakout information related to the order. There are also running totals at the bottom of the order screen that are visible throughout the entire order creation process.



These new front counter functions are available now. Your feedback is always welcome. We appreciate all of you and look forward to these new enhancements helping you in your business!

paste your backup files from the backups folder (mentioned previously) to the external drive. Eject the external drive after the copy is complete, and keep it with you. Do not leave the external drive in the building.

- Configure the FocalPoint Server Manager to back up to an external drive instead of the server. Plug a small flash drive or external backup drive into your server. Open the FocalPoint Server Manager and click on the "Processes" button. Change the backup location to the external drive location. Using this method, it is often best to have TWO external drives and get into a "rotation" routine.

Sign up for an online backup service

Visum does not have a "go to" backup service recommendation, but we often see customers using one of the following online backup services:

- Crashplan [www.code42.com/crashplan](http://www.code42.com/crashplan)
- Carbonite [www.carbonite.com](http://www.carbonite.com)
- IDrive [www.idrive.com/](http://www.idrive.com/)

("Backups" Continued on page 4)

## Using FocalPoint to its Fullest

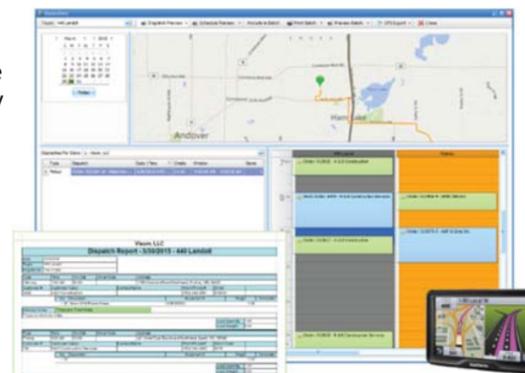
(Focus, Continued from page 1)

You can also –email or reprint contracts from the remote edition. Contracts will need to be opened/created from a FocalPoint workstation.

This new remote edition will run on a tablet, iPad or laptop. Devices need an internet connection that can access a web page. FocalPoint Software licenses must be purchased in order to be able to use this feature. Please contact Visum for pricing information.

### Dispatch Screen:

(1-C from the main menu). This module gives you the ability to schedule deliveries in sequence and assign trucks to specific orders. Once orders are sequenced and trucks are assigned you can print out a report based on truck ID. Included in dispatching is the ability to track measurements of total equipment weight per truck that is provided so trucks aren't overloaded.



Bing mapping is also available as an optional feature for purchase. This feature gives directions and mapping information for each order. Please contact Visum for pricing information.

**W/O Label Printer:** Visum offers a Work Order label printer that will help make any Service Department more organized and efficient. You can quickly and easily track your customer's equipment throughout the repair process at a glance. Work Order labels contain repair notes, customer name and promised date that are captured during the work order creation, eliminating hand written repair tag. The compact size of the Work Order label printer takes up little of your valuable workspace. Cost - \$595.

**Images:** FocalPoint allows you to store pictures for each individual order. You can take multiple pictures and attach them to the order. You can review image history on an open or closed order. This is a wonderful tool that allows you to document a rental transaction with pictures before, during and after the transaction. Consider this feature for hour/odometer readings also.

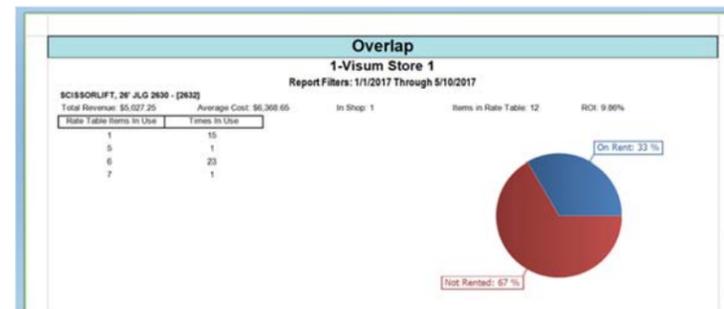


**New Overlap Report:** This new report will give you a wonderful analysis of how your serialized rental fleet is doing by rate table. You select a date range and a rate table, and the overlap report will show you how many times items have gone out together based on the total number of items within that rate table. This report will tell you if you have too many of the same serialized item or not enough.

Features of the new overlap report include:

- Selection by date range

- Selection by one or all rate table(s)



The Overlap Report displays:

- Total revenue earned and ROI for the rate table selected
- Average cost for all items, and total items in rate table
- In-shop quantity
- Pie chart percentage: on-rent, not on rent, in shop
- Chart that shows number of items in rate table used simultaneously and the number of times that simultaneous items were used.

In closing, thank you again for your support and business. Visum enjoys helping you reach your business goals. Feel free to contact me at any time.

## From the Sales Desk

Mike Winders, Visum Sales Representative



From left to right:  
Mike Winders  
Sara Peter  
Emily Winders

We would like to introduce our

inside sales representatives, Sara and Emily, shown above. Their role is to reach out to rental centers and generate qualified sales leads. Sara has been with Visum since 2013 and Emily started this year. Both are valuable Visum team members.

Hardware peripherals can speed up your front counter operations during busy times. A few peripherals that many of our customers find valuable at the counter are:

- Driver's License Scanners – Eliminate typing, and FocalPoint stores an encrypted driver's license image in the customer file for future reference if necessary.
- Receipt Printers– If a rental contract or sale item is paid in full, FocalPoint will automatically print a condensed receipt saving you a full-page copy. All information is provided within the receipt.
- Bar Code Scanners – For those who do a lot of POS transactions, bar coding scanning vs. typing a description or part number is a must for both speed and accuracy.
- Work Order Label Printer – Designed for rental stores that do customer repairs. The label will provide the customer's name, repair notes, promised date and more.
- Mobile Edition (iPhone and Android) – Allows you to monitor your rental center when you're not there. You can see cash drawer balances, rental inventory availability, store revenue and other features that are totally secure and password protected.

Please do not hesitate to call if you have questions about any of these devices or other ways that FocalPoint can improve efficiencies at your front counter.