

# CR2 Features

## Equipment Rentals & Sales

Create a sales, rental or RPO order for equipment.  
Pricing by item and customer by branch.  
Discount by line item, section total or bottom line price.  
View Gross Margin of an order.  
Select from multiple quote formats based on client's needs.  
E-mail quotes to clients.  
Taxes by origin, delivery or mixed locations.  
Ability to accept trade-in equipment.  
Assign over/under trade amount for trade-ins.  
Capitalize costs for equipment being sold.

## Acquisition

Create purchase orders for equipment and parts.  
Configure equipment with manufacturer options.  
Capitalize charges for complete book value tracking.  
Accrual finance on received product.  
Order-to-point worksheets for parts re-ordering.  
Future-predictive needs parts re-ordering.

## Equipment Inventory

Depreciation of straight-line and % of rental amount.  
Define spec-sheet options for sales quotes.  
Define attributes by asset based on purchased configuration.  
Configure detailed warranties for internal and customer owned equipment.  
Store notes payable information by asset.  
View detailed list of adjustments & transactions that form NBV of each owned asset.

## Parts Inventory

View labor requirements on orders and quotes.  
Check availability of product by branch.  
Configure List, Cost and Fleet pricing.  
Price freezes by part by customer.  
Configure protected stock.  
Define core parts & attach to remanufactured parts.  
Configure line of replaced parts.

## Physical Inventory

Inventory product by groupings or bin locations.  
Hide current inventory numbers on printed count sheets.  
Force re-counts of product over a certain dollar value.  
Output cost accounting for lost & found product.

## Security

By user group.  
Secure icons, buttons, screens and fields.

● Indicates Optional Module

## Operations

Real time, company wide time equipment availability.  
Manage inventory shortages by exchanges, transfers, or purchases.  
Various options for printing pick lists & delivery tickets.  
Prep and Dispatch.  
Managing damaged items.  
Print inspection tickets for all equipment brought on property.

## ● Parts Counter Sales

Point of sale system.  
Includes emergency and back orders as well as inter-branch transfers.  
Notification of superseded (replaced) & core parts.  
Return product to manufacturer / vendor.  
Standard warehouse features for filling sales orders.

## ● Service and Repair

Customer and warranty billing.  
Tracking of internal fleet maintenance costs.  
Segmentation produces multiple invoices from a single work order.  
Track serviced equipment and meter readings.  
Capitalize repairs to internal fleet equipment.  
Store a complete list of all customer owned equipment.  
View warranty information for internal and customer owned equipment.  
Complete date & time scheduling for work orders.  
Assign services to one or more mechanics.  
Assign and track services & outside vendor purchases.  
View complete history of services on an asset.  
Work in progress reports.

## Accounting

Functionality available in CR2:  
Accounts Receivable Invoicing.  
Credit and Debit Memos.  
Accounts Payable (voucher purchase orders).  
Equipment depreciation (fixed or % of rental amount).  
Accrue received product.  
Trade-in Over/Under Trade Accounting.  
Ledger Adjustments to Equipment.  
Inventory Cost Adjustments for Physical Inventory

Interface with leading Accounting packages

- Post invoices to receivables
- Post payment vouchers
- G/L interface
- Bring account balances back into CR2



Rentals & Sales  
Acquisition  
Accounting  
Operations  
Part Counter Sales  
Service & Repair

CR2: Enterprise software for equipment sales, service and rentals

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## ► How Can Your Company Benefit with CR2 ?

### Discover CR2:

*Providing tools to manage your equipment distribution business.*

Taking your business to the next level requires improving the productivity of your staff. CR2 provides you with the necessary tools to achieve this. By connecting your various departments and providing real time information across your entire organization, CR2 grows your business. Imagine having real time updates on customers, equipment and parts inventories and current service statuses. No wonder CR2 is the fastest growing solution in the distributors equipment rental business.

### Why UBS?

At UBS we approach each client as a partner. As a partner, our commitment goes beyond our product ... all the way to our clients' business success. We bring to this partnership the strength of a solid organization with the resources, skills and professionalism that makes us a partner of choice. For over 25 years we have been working with businesses of all sizes. With small local organizations and Fortune 1000 companies we have partnered to make their businesses reach that next level of operational and financial success.

"CR2 has exceeded our expectations of what a multi-branch company-wide software solution should be. We feel CR2 is the most comprehensive package available to our industry."

*Dominic Giuffre Jr  
Giuffre Bros. Cranes, Inc  
Milwaukee, Wisconsin*



### OWNER / GM

You have instant access to detailed pricing info for all currently pending orders and all closed sales orders for all offices and the total organization.

From a single screen you can see your entire fleet of equipment with a comprehensive view of purchasing data, service and rental activity, and accounting details.

**Be in Control**

### SALES & RENTALS

Your staff can quickly and easily find the exact equipment configuration your customer is looking for, manufacture's incentives, take a trade-in, create the order, and email it directly to the client for approval.

Equipment availability across all locations is easily viewed by sales people as well as complete purchasing history by customer.

**Be Profitable**

### OPERATIONS

Operations is about getting things done efficiently.

Equipment check-in / check-out system insure that all required preparation, safety inspections and necessary documentation are logged and accounted for.

Physical inventory and Cycle counts become quick and accurate with CR2's barcode based process.

**Be Efficient**

### SERVICE

Easily tie the parts, labor, purchases, transfers and backorders to a single service document and split the billing between the customer, warranty, and even internal service accounts.

Keep track of both owned and customer equipment with complete purchase, warranty, and service history in real time.

**Be Prepared**

### PARTS

Effectively manage your parts inventories with algorithmic systems based on historical usage and current sales that automatically reorder and transfer parts between locations.

Updated supplier pricing, substitutions, and recalls can be imported into CR2.

**Be Accurate**

