

## Rocket RMS Features List

### **Fast Order Creation**

Create new orders fast, with minimal detail needed to get started  
Create quotes (that do not block inventory) or reservations (holds inventory), then easily update status when confirmed  
Add new customers from within order creation  
Set default discount rates for customers and for specific orders  
Set default billing days for order different than calendar time  
Optionally add prep time and return time to orders  
Keep track of required paperwork, such as rental agreements, insurance certificates, and references.  
Flag orders missing (or with expired) paperwork  
Store rental agreements and other docs with each order and linked to the customer

Filter item selection by category and subcategory  
Text search of item catalog  
See kits and individual items  
See item pricing, owned inventory, local and global inventory one line  
Add items to order with a single click  
Add quantities of an item to order without having keep re-adding the same item

Flag but allow overbooking of items  
Set special item-level pricing for an order  
Set line-item discounts for an order, different than the default discount  
Change/over-ride billing days on a line item basis  
Change pricing or quantities of an item within a kit

Ability to clone old orders  
Keep track of revisions with a timestamped log of all changes to an order  
Print orders within order screen  
Three click emailing of order within order screen  
Three click emailing of request for paperwork within order screen  
Three click emailing to request payment within order screen  
Automatically add credit-card surcharges to orders  
Flag orders with overbooking

### **Efficient Warehouse Operations**

Staging, check out, and check in workflows that dynamically show what happens next

Confirmed orders automatically loaded into Staging queue, sorted by pickup date  
Staging process works on both handheld and desktop computers  
Staging process works with barcoded and non-barcoded items  
Staging process updates system dynamically on an item-by-item basis

Barcodes can be scanned in any order  
Staging process can be performed in parallel by multiple users

Changes to orders dynamically update warehouse in real time  
Incomplete changed orders will alert when customer picks up  
Capture customer signature, picture, and ID digitally on pickup

Deep handheld and barcode integration to quickly allow order processing without being chained to a desk

Warehouse process works on desktop, phone, and tablet... all at the same time  
No app needed, barcode scanner agnostic – use any device with a modern web browser

Quickly identify a return order based on any barcode  
Mark an order in-house without initiating a full return  
Flag items that are lost or damaged quickly and easily, and have this automatically update item availability  
Check in process dynamically updates item status for fast turn-around

### **Detailed Quality Control**

Items tagged for needing QC automatically routed to a quality control queue after return  
Custom QC forms based on type of item  
Perform checklists, capture meters, review and draw defects, take notes, capture pics  
QC history tracked on a per item basis  
Items passing QC automatically returned to rental availability

### **Easy Invoicing and payments**

Support for upfront payment and net terms payment  
Deep integration with Stripe for payment processing  
Collect payments securely by sending links to customers with a few clicks  
Accept credit cards, ACH payments, and wire transfers securely  
Orders automatically update when receiving payments  
Credit card processing fees automatically add to order when credit cards are processed  
Payment history automatically linked and tracked within an order  
Partial payments accepted  
Deposits automatically collected and returned based on order status  
Refunds automatically issued based on order changes and status

Customer-level ability to review paid and unpaid orders  
Customer-level ability to receive payments and review transaction history  
Detailed receivable aging reports by warehouse, customer, and order  
Customer credit card info kept “on file” for future payments in a secure manner

Sales tax automatically charged based on warehouse-level %

Sales tax reporting by warehouse level

All financial interactions with customer can be accomplished within software

## CORE SYSTEM DESIGN

### **“Operating System “ Philosophical Approach**

Designed so all daily operations happen within Rocket

Integrated payment processing

Integrated Accounts Payable

Integrated Invoicing

Integrated Document Storage

Email most common follow ups within Rocket

### **Cloud Based Architecture**

100% cloud based, no onsite software needed

Works with any modern web browser on any device

Automatic backups

### **Real-time Visibility**

Dynamically updated Dashboards shows what needs to be done today and tomorrow, with hyperlinks to the relevant contracts

Notifications for changes to orders

Calendar View showing Pickups and Returns by date, dynamically linked to relevant orders

Keep track of detailed, real time status of every item and every order

Order status automatically changes based on activity, so you always know what is going on with every item and order

### **Customers and Vendors**

Track all order history

Store key paperwork to be associated with the customer, including expiration dates

Track payment aging and history

Store payment methods securely

Store multiple contacts for a company

### **Administration**

Set roles and permissions for individual users

Run reports for daily sales, sales tax, consignment, receivables, and more

### **Inventory**

Quickly check item availability and pricing via text search

- Organize items into categories and subcategories
- Set daily, weekly, and monthly pricing
- Set replacement values
- Save notes for individual items
- Support for both barcoded and non-barcoded items
- Support for bulk and serialized barcode items

- Track the home warehouse, availability, and status of every item in inventory in real-time
- Calendar-view of item availability with hyperlinked order details
- Track rental and service history for every item

- Organize inventory into multiple warehouses and locations
- View availability both locally and globally
- Transfer items between your warehouses and locations

- Support for consigned inventory
- Ability to intermix consigned and owned inventory within a single item type
- Automatically generated consignment reports by consignor

- Create kits of items
- Create kits within kits
- Allow for optional items within kits
- Allow for easy editing of item quantities, pricing, and discounts within a kit
- View availability of kits based on availability of kit component items