rental life

#### crmpartners



# RentalLife

Installation and Setup Guide - English

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### **1.Introduction**

With RentalLife, CRM Partners has developed a specific leasing industry CRM solution that can professionally manage the entire leasing process of machinery, equipment and vehicles from quoting through inventory management to maintenance and replacement investment planning. The new Rental Solution is optionally both portal-compatible and suitable for mobile devices and allows a detailed evaluation of the leasing transaction by device types, regions and customers. The reporting is user-friendly by means of graphical representation.

#### This document describes

- steps to import Rental Life solution package into CRM instance (Dynamics 365, v 9.0.2)
- security roles and their privileges

## 2. Languages

RentalLife is supported in English and German language. English is base language, and solution will be in English by default. If organization wants to be able to use Rental Life it in German, German languages need to be installed before importing solution.

Check if desired language is already installed:

1. Go to Settings > Administration > Languages

iii Dy	namics 365 v Settings v Administration		P O + 7 O ? 🕒
Admini	stration		
Which fea	ture would you like to work with?		
Ē	Announcements Create, edit, and delete announcements that appear in the Workplace area.	<b>1</b> 23	Auto-Numbering Specify the prefix numbers for contracts, cases quotes orders, articles, invoices, and campaigns. Select the suffix length for contracts, cases, quotes, codes, advecter, and invoices.
	System Settings Set the format for various values, such as numbers, the calendar, and currency. Select the email tracking, marketing, and customization options for your organization. Set Microsoft Dynamics 365 for Outlook options. Manage report categories.	۲	Languages Add or remove support for additional languages.
R	Privacy Preferences Set the privacy preferences for the organization.		Subscription Management See payment and billing options, and purchase additional licenses. You must be a member of an appropriate security role to do these tasks.
	System Notifications View important system messages such as scheduled outage notifications.		Resources In Use View details about your organization's use of storage, custom entities, and workflows and dialogs.
Y≑	Yammer Configuration Connett Microsoft Dynamics 365 to your enterprise Yammer network	<b>E</b>	Data Performance Review, analyze, and optimize the data access performance of components in your organization.
<b>1</b>	Microsoft Social Engagement Configuration Connett Microsoft Dynamics 365 to Microsoft Social Engagement for Social Insights	C.	Virtual Entity Data Sources Add. edit. or delete connection information for external data sources used by virtual entities in the system.

- 2. Locate German language and check if it is enabled/installed
- 3. If German is not installed and user wants to install it, checkbox in front of German needs to be enabled and installed by click on Apply. This will take few minutes, and CRM instance might not be available for other users during this time.

La	anguage 🛧	Language Code	Status	Ver: 💍
-	mench	1050	Disabled	0
	Galician (Galician)	1110	Disabled	0.0
1	German	1031	Disabled	0.(
	Greek	1032	Disabled	0.0

-	lage Settings languages to enable for your organization, and then click Apply.	? ×
La	Confirm Language Change       ×         You have selected 1 language to change.	() 119
	This operation will either enable or disable the selected languages for your Organization. Important: Each language can take several minutes to enable. During this time, other users of the Organization may not be able to use Microsoft Dynamics 365. To continue, click OK.	0.0
	OK Cancel	Close

Language Settings Select the languages to enable for your organization, and then click Apply.	?	×
•** •		
Enabling 1 language(s).		
A	Close	

#### 3. Import

#### 3.1 Import of Rental Life solution

- RentalLife will be provided in a form of package that needs to be imported into user's Dynamics
   365 instance
- 2. Copy and paste PkgFolder and RentalLife.dll into your PackageDeployer inside of CRM SDK Toolkit (users need to have SDK Toolikt lkates version downloaded from Microsoft). Run PackageDeployer.exe from same folder, and follow the process. Result will be installed solutions: RentalLife and License check.,

#### 3.2 License administration solution

1. After importing package, new menu options on Setup sitemap area will appear (License administration), click on it.

	SANE	DBOX
Settings	Events	Marketing
	Process Center	CRM Partners Licen
Email Configuration	Processes	🎾 License Administrati
Activity Feeds Confi		License Administration
Activity Feeds Rules		
Dynamics 365 App f		
Sales Al		

2. When using the solution for the first time, it will look like in the image below. Click on Register Customer.

#### License Dashboard

0

Please register to get lice	ensed		
New Customer Are you a new customer? Welcome! Choose this option to create a new customer registration.	or	New Instance Choose this option to add a new instance using an Activation Token (you can obtain a token from an existing instance).	
Register Customer		Register Instance	

3. Fill out information as requested, and click Register

Lic	ense Dashboard		9	
	Register customer			
	CRM Partners			
	John Smith			
	@crmpartners.com			
	<ul> <li>This is a production instance</li> <li>I agree that my details are used for license administration purposes. We will use your name and email address to contact you about you your details one year after all your licenses have been expired.</li> <li>Yes, I want to stay up to date about your cool products. We will send you a newsletter only a few times per year. You can unsubscribe at Register</li> </ul>			
4.	After registration, screen will look like this:			
	License Dashboard	Activation Token	Registration Details	0
	CRM Partners			
	Available licenses			
	Installed solutions		C Request Licens	es

In the 'Installed solutions' section you get an overview of all installed solutions that require licensing. After installation of the solutions, you need to retrieve your licenses. Click on the 'Request Licenses' to do so. If you already purchased a license, it will be activated. If not, a trial license for 30 days will be installed. Make sure to purchase a license for your instance to keep using this product.

For help or more information, click ? sign on the upper right corner.

C Request Licenses

Register your instance         In order to be able to retrieve or activate your licenses you need to register         your CRM instance. If you have already registered another CRM instance,         please register this instance using an activation token. This will associate         both instances and allows you to use the same licenses. To obtain an         activation token, open the License Dashboard in a registered CRM         instance, and click on the 'Register Instance' button. This will show a dialog         in which you can copy your activation token.         Retrieving your licenses         In the 'Installed solutions' section you get an overview of all installed         solutions that require licensing. After installation of the solutions, you need         to retrieve your licenses. Click on the 'Request Licenses' to do so. If you         already purchased a license, it will be activated. If not, a trial license for 30         days will be installed. Make sure to purchase a license for your instance to	In order to be able to retrieve or activate your licenses you need to register your CRM instance. If you have already registered another CRM instance, please register this instance using an activation token. This will associate both instances and allows you to use the same licenses. To obtain an activation token, open the License Dashboard in a registered CRM instance, and click on the 'Register Instance' button. This will show a dialog in which you can copy your activation token. <b>Retrieving your licenses</b> In the 'Installed solutions' section you get an overview of all installed solutions that require licensing. After installation of the solutions, you need to retrieve your licenses. Click on the 'Request Licenses' to do so. If you		+ Activation Token	Registration Details	0
	keep using this product. Need further help?	In order to be able to your CRM instance. please register this is both instances and a activation token, ope instance, and click of in which you can co <b>Retrieving your lice</b> In the 'Installed solu solutions that require to retrieve your licer already purchased a	o retrieve or activate your If you have already regis instance using an activatio allows you to use the sam en the License Dashboard on the 'Register Instance' I py your activation token. enses elicensing. After installati ases. Click on the 'Request a license, it will be activate	tered another CRM instance on token. This will associat le licenses. To obtain an d in a registered CRM button. This will show a dia overview of all installed on of the solutions, you ne st Licenses' to do so. If you ed. If not, a trial license for	ee, e llog ed 30

And finally, activated license will look like following image:

Installed solutions

Rental Life

Trial License, 29 day(s) remaining

#### 3.3 Switch language (for logged in user)

1.

? 2 3 + Y 0 Q records Options arketplace More Actions 🝷 Print preview Apps for Dynamics 365  $\bigcirc$ See Welcome Screen About Privacy & Cookies

Go to Settings button on upper right corner and select Options

2. Go to tab Languages, and switch User Interface to desired language

	Personal ge the default dis			onalize Microso	ft Dynamics 365,	and ma	inage you	r email tem	plates
General	Synchronization	Activities	Formats	Email Templates	Email Signatures	Email	Privacy	Languages	
	change the display la		for items suc	amics 365 displayed					
User Inte	rface Language	Germ	nan			•			
Help Lan	guage	Germ	nan			•			

Note: This will switch entire CRM interface into selected language, not just RentalLife solution.

### 4. Security

CRM solution RentalLife comes with 5 security roles that can be assigned to users.

#### 4.1 Security Roles

#### 4.1.1 Rental Manager (Rental Life)

User with "Rental Manager" security role will able to cretae/update/delete the all the master (Subject, Products, Cost/Offerings, Deprecation, Price List) and daily records (Lead, Opportunity, Quote, Order, Invoice, Repair) into system. He will br the system administrator for "Rental Life"

#### 4.1.2 Rental Person (Rental Life)

User with "Rental Person" security role will able to cretae/update the all the master (Subject, Products, Cost/Offerings, Deprecation, Price List) and create/update/delete all daily records (Lead, Opportunity, Quote, Order, Invoice, Repair) into system.

#### 4.1.3 Sales Manager (Rental Life)

User with "Sales Manager" security role will able to read the all the master (Subject, Products, Cost/Offerings, Deprecation, Price List) and create/update/delete all daily records (Lead, Opportunity, Quote, Order, Invoice) and create maintenance task (Repair) into system.

#### 4.1.4 Sales Person (Rental Life)

User with "Sales Person" security role will able to read the all the master (Subject, Products, Cost/Offerings, Deprecation, Price List) and create/update all daily records (Lead, Opportunity, Quote, Order, Invoice) and create maintenance task (Repair) into system.

#### 4.1.5 Service Person (Rental Life)

User with "Service Person" security role will only able to update the repair/maintenance task into system that will update the assets into background.

#### 4.2 Assign security roles to users

#### 1. Open Users in CRM from Settings / Security / Users

Sales	Service	Marketing	Settings	Training
Business	Customization	System		Process Center
Business Man	ageme Customizations	Administration	Email Configuration	Processes
Templates	Solutions	Security	Activity Feeds Confi	Microsoft Flows
Product Catal	og Microsoft AppSource	Data Management	Activity Feeds Rules	
🍾 Service Mana	gement 车 Plug-In Trace Log	System Jobs	Dynamics 365 App f	
		Document Manage	Sales Al	
		Auditing		
_				
🔡 Dyn	amics 365 🗸	Settings ~	Security	
Cocurity	$f_{114}^{\mu\nu}$			
Security				
Which featu	ire would you like to w	ork with?		
	Users			
	Add new users. Edit information	aboutusers and deactiva	te user records, Manage t	he teams, roles, and
	icenses assigned to users.			
0	Security Roles			
	Security Roles Greate new security roles. Mana	ge and delete existing sec	urity roles for your organ	ization.
		a	1.158 S. 1958.	
	Sield Convitor Dustilas			
	Field Security Profiles Manage user and team permiss	ions to read, create, or wr	te information in secured	fields.
	-			WARESTAL
	Positions			
T	Add new Position. Modify the P	osition description.		
		na na sa shina ni sha chapa a Patata Afrika a		

- + NEW 🖋 EDIT 🛛 APPROVE EMAIL 🖉 REJECT EMAIL 🎍 PROMOTE TO ADMIN 🎐 MANAGE ROLES → Enabled Users ~ Full Name ↑ Site **Business Unit** First Admin testcrmp08 ~ Rental Manager testcrmp08 Rental Person testcrmp08 Sales Manager testcrmp08 Sales Person testcrmp08 Service Person testcrmp08
- 2. Select user, and click assign roles

3. Select one or more Rental Life roles and save

Manage User Role What roles would you like to a		x selected?
Role Name	Business Unit	
Marketing Professional	testcrmp08	
🔲 Relationship Insights Admin	testcrmp08	
🗹 Rental Manager (Rental Life)	testcrmp08	
🔟 Rental Person (Rental Life)	testcrmp08	
Sales Manager	testcrmp08	
🕑 Sales Manager (Rental Life)	testcrmp08	
🛃 Sales Person (Rental Life)	testcrmp08	

### 5. Templates

#### 5.1 Template Types

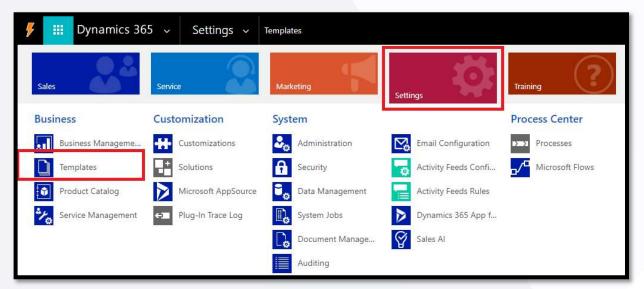
Document templates available for RentalLife solution are:

- 1. Quote Rental Business
- 2. Order Rental Business
- 3. Invoice Rental Business

These templates will be used to generate quotes, orders and invoices based on information in CRM provided for Rental management.

#### 5.2 Add templates to CRM

1. Go to Settings > Templates



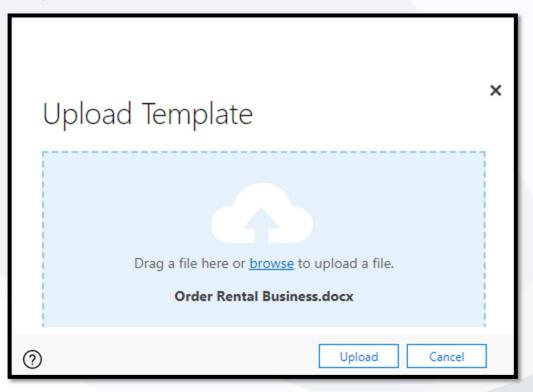
2. Click on Document Template

<b>%</b> :::	Dynamics 365 🕞	Settings ~	Templates						
1 A New ve	ersion of Organization Insights dashbo	ard is available. See how	Experience it now						
Templat	es								
Which feature would you like to work with?									
	Article Templates Create and manage templates for article	is in the knowledge base.	V		Contract Templates Create and manage templates for contracts.				
	Email Templates Create and manage templates for email	messages.		Ľ	3	Mail Merge Templates Upload and manage Word templates for use with mail			
	Document Templates Create and manage templates for docur	nents.		É		Email Signatures Create and manage email signatures.			

3. Click New to upload new template

Create template from Dynamics	×
Select a template to create:	
Excel Template Word Template	
Select data:	
Filter by entity Order 🔻	
Upload         Sele	ct Entity

- 4. Select Word Template, and corresponding Entity (Order, Quote or Invoice) and click Upload.
- 5. In next step, add template corresponding to the entity that was selected in previous step, and click Upload.



6. Next time when going through RentalLife process, proper template will appear on Quote, Order and Invoice form.

lew version of Organizat	tion Insights dashboard is available. See ho	w it can help you drive end user a	toption and stay ahead	of support issues.	xperience it now						
	CREATE ORDER 🖳 PRINT QUOTE FO			ARE 🗢 EMAIL A LINK							
	CREATE ONDER A PRINT QUOTE PC	R COST PROCESS *	3# ASSIGN C2 SH	ARE CO EMAIL A LINK	S KON WORKFLOW	E Start	Dialog				
QUOTE : RENTAL BU	JSINESS -					P Flow	bialog		1	Effective From	
RentalLife Ste	ep tests '≡					-	Templates	Create Wo	- ord Template		
						🕑 Run F		Creat	e Word Template		
Em FOITH Editor						Word Ten	Word Templates				
Summary								Ange	botszusammenfa	assu	
Quote ID*	QUO-01126-F9M3H1	PRODUCTS						Quot	e Rental Business		
	Q00-01120-15M5111	Theorem						Quot	Quote Summary		
Revision ID*	0	Subject	Product Name	2	Date Fro	m   D	ate To Durat	tion	Quantity C	Cost Per Day	
Name *	RentalLife Step tests	📫 Laptop	WWI Laptop	12 M0120	01/	Nov/18	10/Nov/18	10	2.00000	\$5.	
	Rentalche Step tests	Laptop	WWI Laptop	12 M0120	01/	Nov/18	10/Nov/18	10	2.00000	\$5.	
Currency *	US Dollar	1		·			3 <i>3</i>			•	
Price List*	Rental Business										
Price List											