



RentalLife

Installation and Setup Guide - English

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Content

1.	Introduction	3
2.	Languages	4
3.	Import	6
3.1	Import of Rental Life solution	6
3.2	Import of License check solution	6
3.3	Switch language (for logged in user)	9
4.	Security	10
4.1	Security Roles	10
4.1.1	Rental Manager (Rental Life)	10
4.1.2	Rental Person (Rental Life)	10
4.1.3	Sales Manager (Rental Life)	10
4.1.4	Sales Person (Rental Life)	10
4.1.5	Service Person (Rental Life)	10
4.2	Assign security roles to users	11
5.	Templates	13
5.1	Template Types	13
5.2	Add templates to CRM	13

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

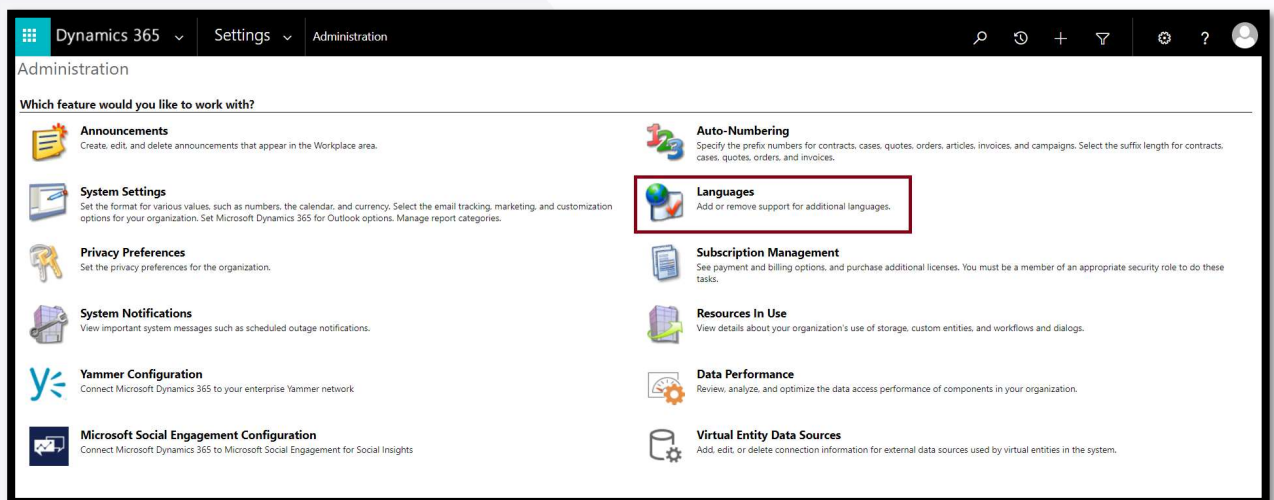
- steps to import Rental Life solution package into CRM instance (Dynamics 365, v 9.0.2)
- security roles and their privileges

2. Languages

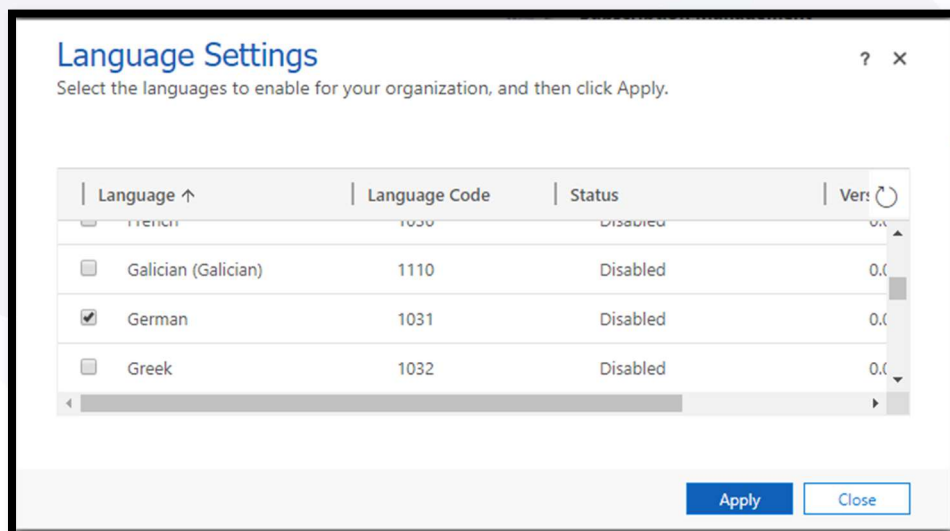
RentalLife is supported in English and German language. English is base language, and solution will be in English by default. If organization wants to be able to use Rental Life it in German, German languages need to be installed before importing solution.

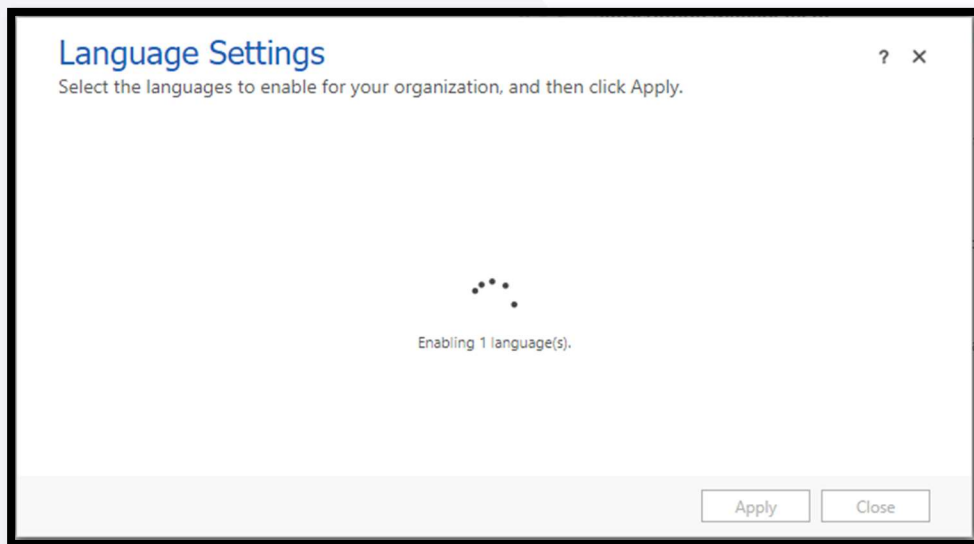
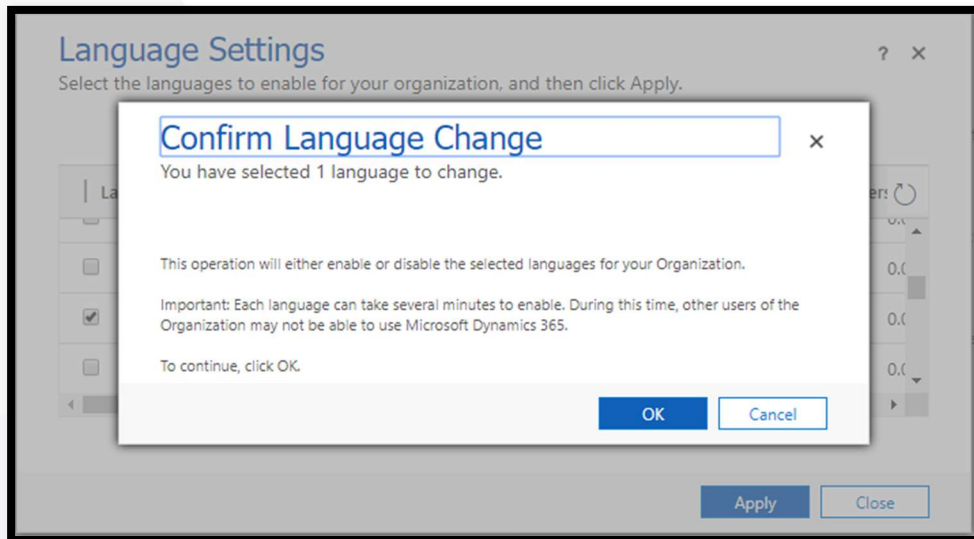
Check if desired language is already installed:

1. Go to Settings > Administration > Languages



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.





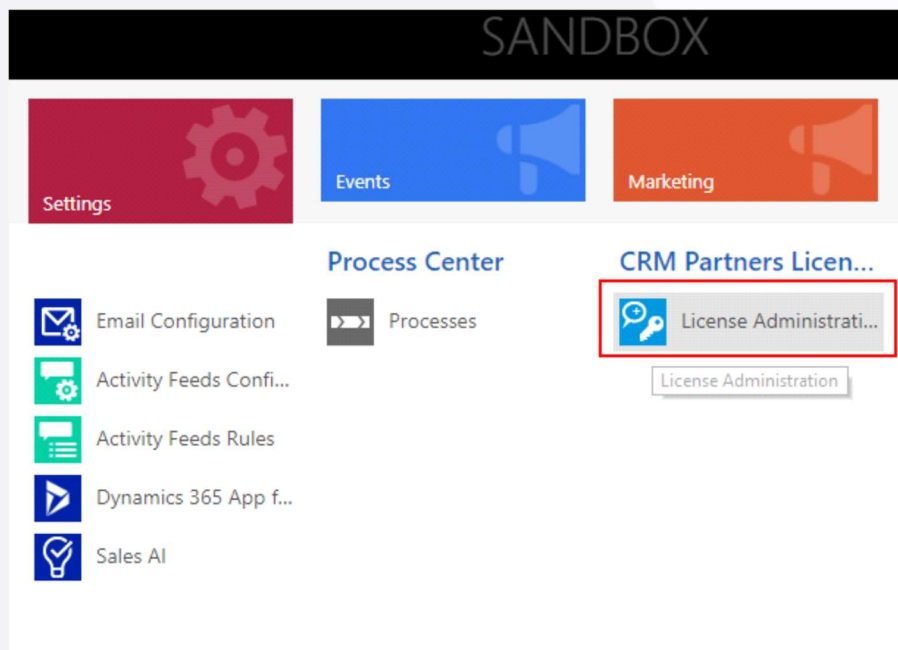
3. Import

3.1 Import of Rental Life solution

1. 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 Toolkit 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.



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

License Dashboard



Please register to get licensed

New Customer

Are you a new customer? Welcome!
Choose this option to create a new customer registration.

Register Customer

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 Instance

3. Fill out information as requested, and click Register

License Dashboard



< Register customer

CRM Partners

John Smith

[redacted]@crmpartners.com

☐ This is a production instance

☒ I agree that my details are used for license administration purposes. We will use your name and email address to contact you about your licenses. We will delete your details one year after all your licenses have been expired.

☒ 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 any time.

Register

4. After registration, screen will look like this:

License Dashboard

CRM Partners

+ Activation Token

Registration Details



Available licenses

Installed solutions

Request 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 keep using this product.

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

+ Activation Token
Registration Details
?

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 keep using this product.

Need further help?

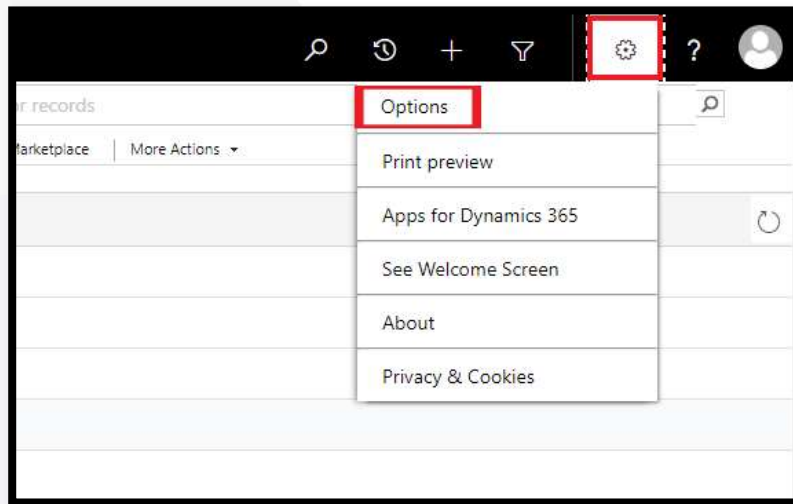
If you have technical problems, contact support. If you want to purchase licenses for your instance, please contact your account manager. Or use the contact details provided in the App-source.

And finally, activated license will look like following image:

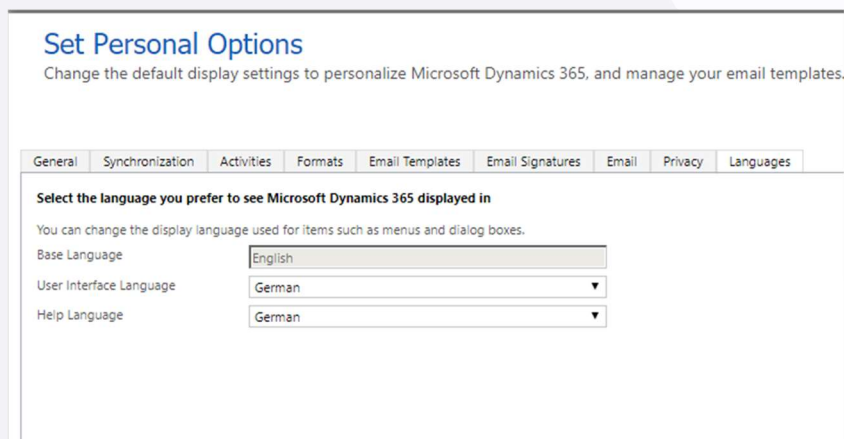
Installed solutions		Request Licenses
Rental Life	✓	Trial License, 29 day(s) remaining

3.3 Switch language (for logged in user)

1. Go to Settings button on upper right corner and select Options



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



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

4.1.2 Rental Person (Rental Life)

User with "Rental Person" security role will be able to create/update 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 be able to read 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)

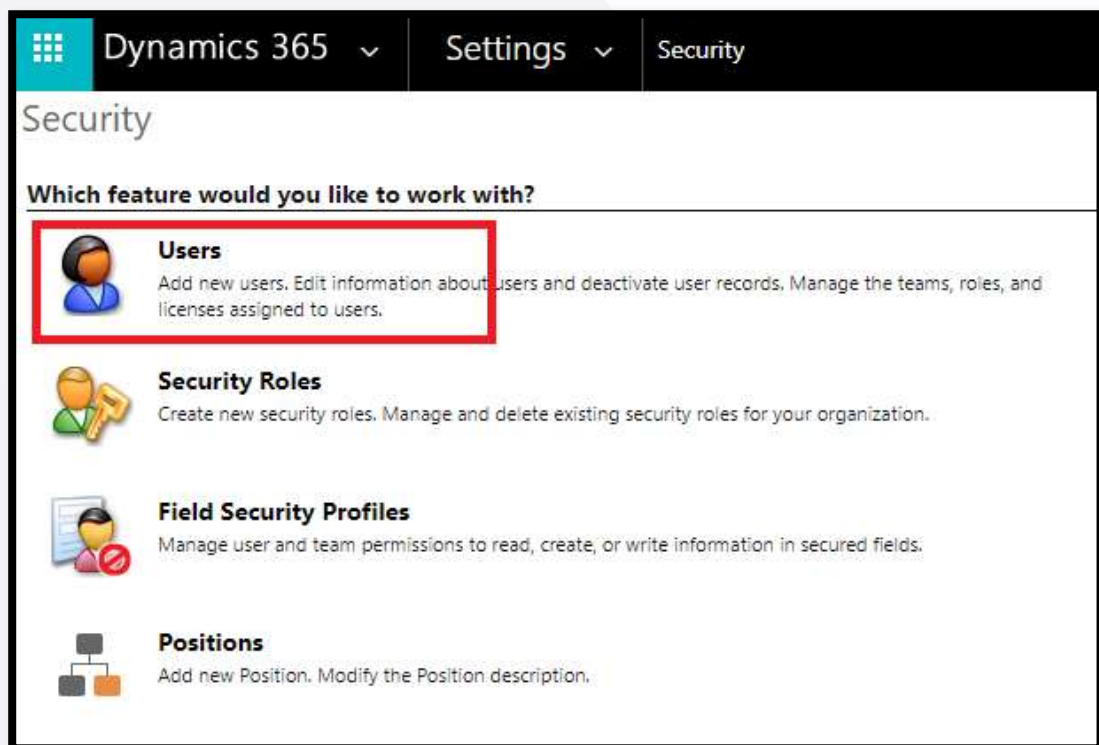
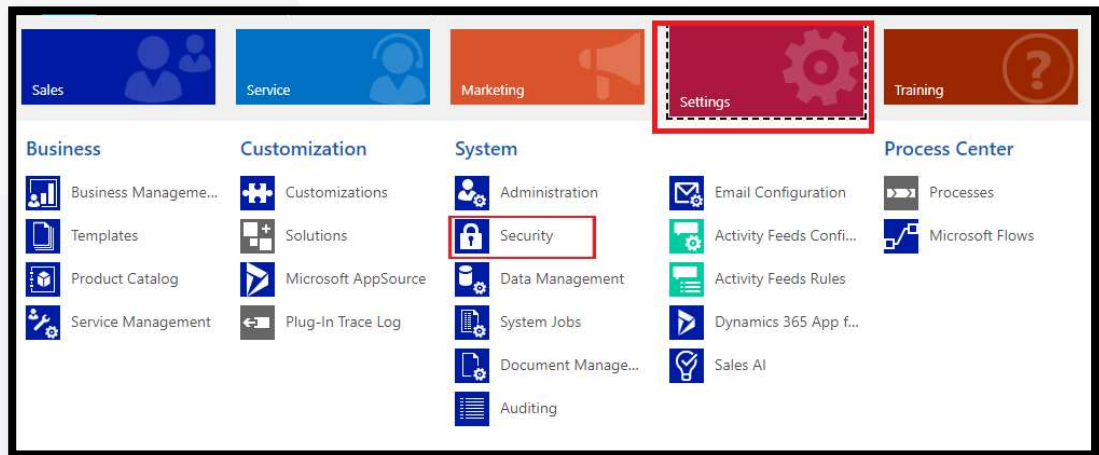
User with "Sales Person" security role will be able to read all the master (Subject, Products, Cost/Offerings, Deprecation, Price List) and create/update all daily records (Lead, Opportunity, Quote, Order, Invoice) and create maintenance task (Repair) into system.

4.1.5 Service Person (Rental Life)

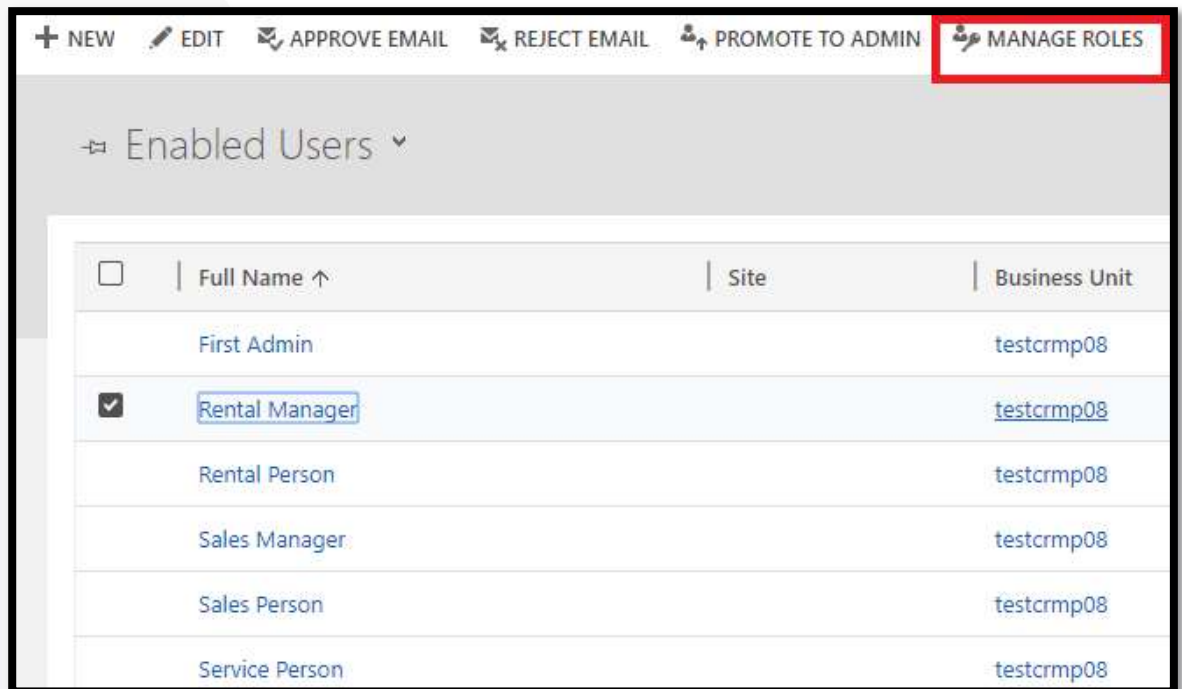
User with "Service Person" security role will only be able to update the repair/maintenance task into system that will update the assets into background.

4.2 Assign security roles to users

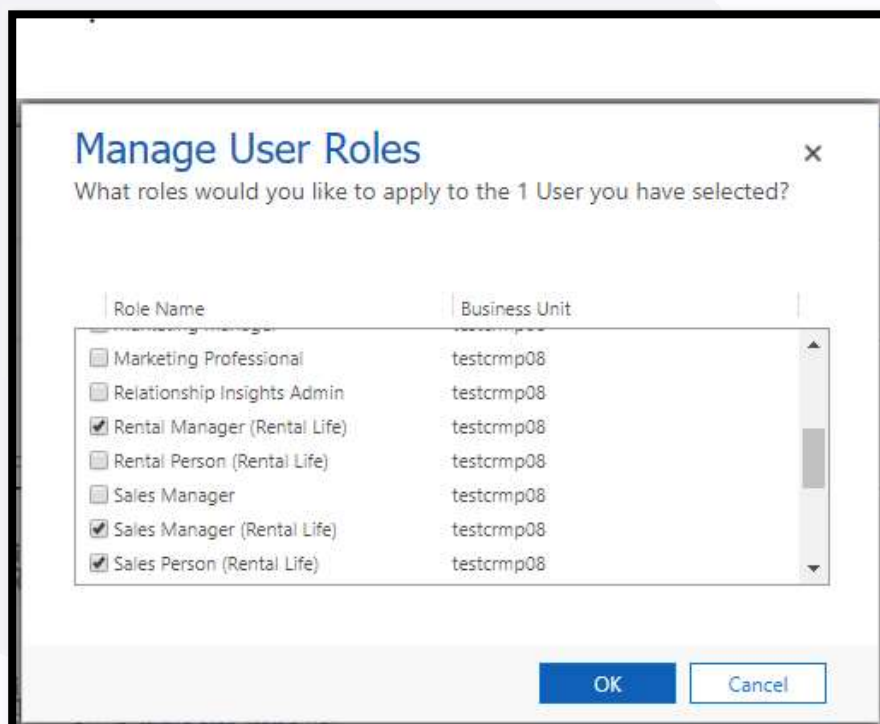
1. Open Users in CRM from Settings / Security / Users



2. Select user, and click assign roles



3. Select one or more Rental Life roles and save



5. Templates

5.1 Template Types

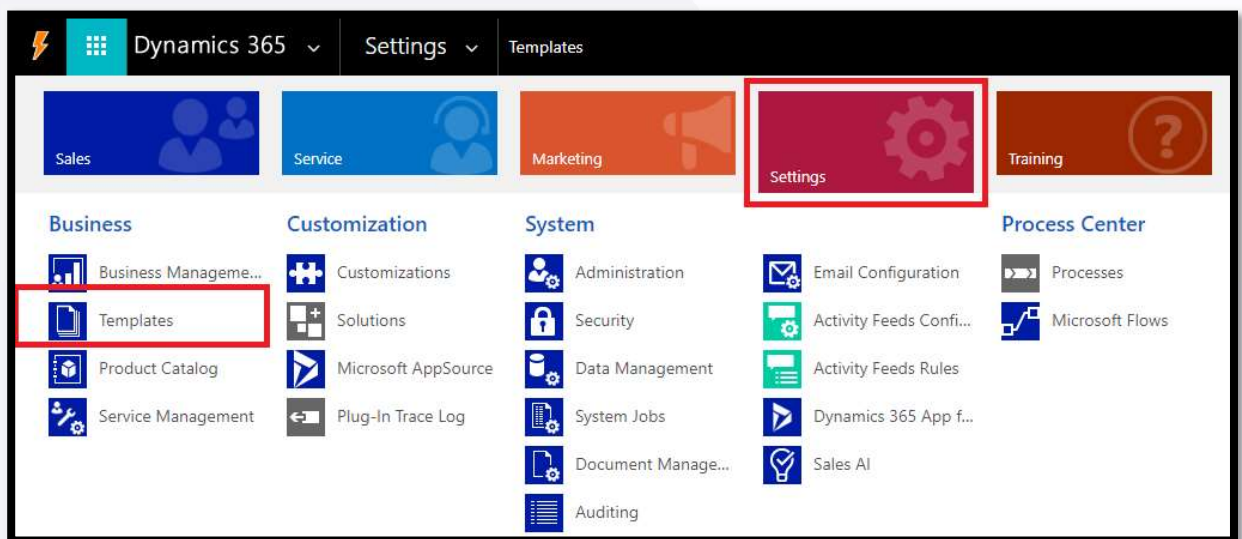
Document templates available for RentalLife solution are:

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

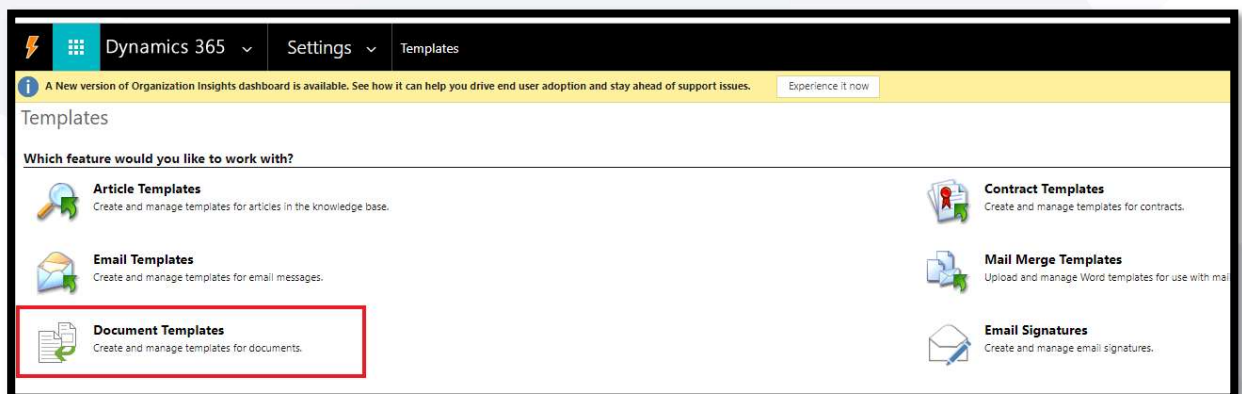
These templates will be used to generate quotes, orders and invoices based on information in CRM provided for Rental management.

5.2 Add templates to CRM

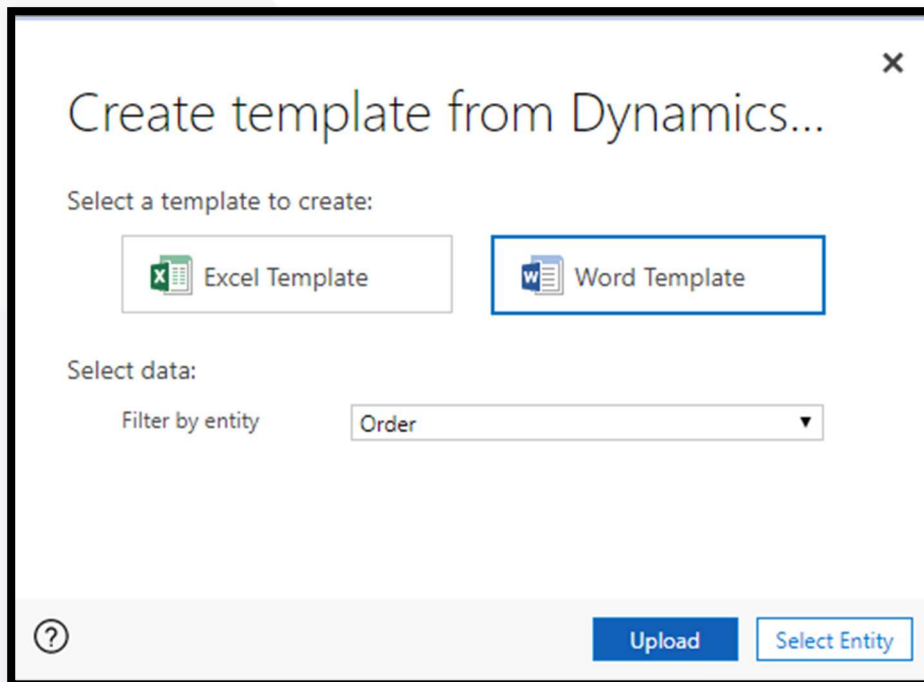
1. Go to Settings > Templates



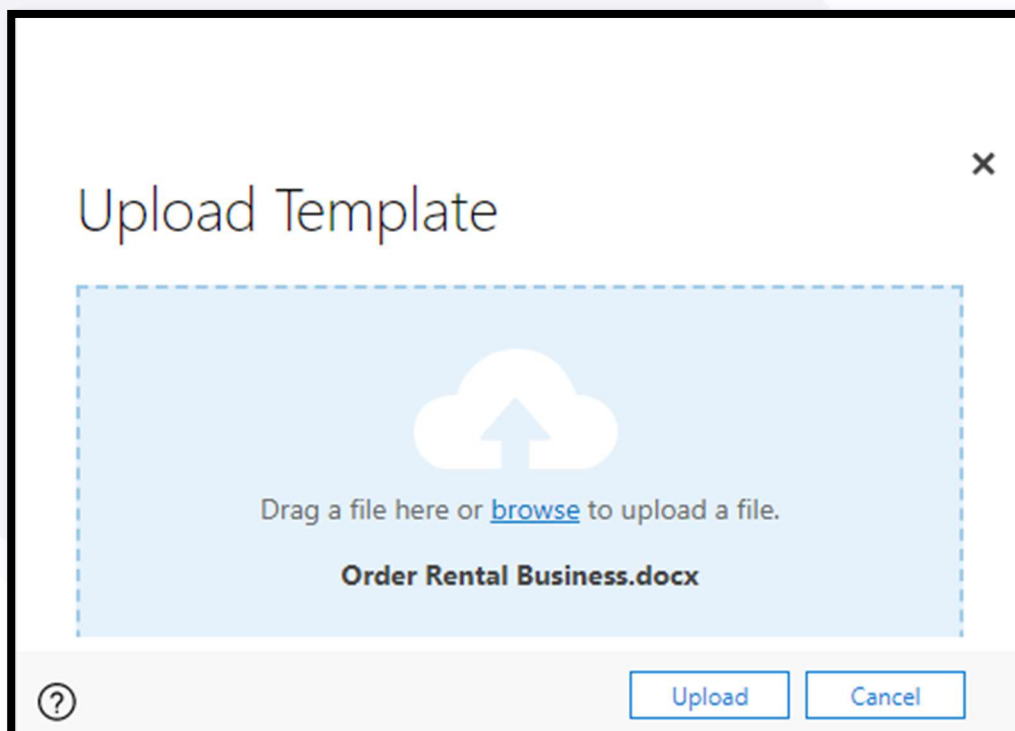
2. Click on Document Template



3. Click New to upload new template



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.



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

The screenshot shows the Dynamics 365 interface for a quote titled "RentalLife Step tests". The "QUOTE: RENTAL BUSINESS" dropdown is highlighted. The "Word Templates" menu is open, and the "Quote Rental Business" option is highlighted. The form displays summary information, a table of products, and shipping information.

Summary

Quote ID *	QUO-01126-F9M3H1
Revision ID *	0
Name *	RentalLife Step tests
Currency *	US Dollar
Price List *	Rental Business

PRODUCTS

Subject	Product Name	Date From	Date To	Duration	Quantity	Cost Per Day
Laptop	WWI Laptop12 M0120	01/Nov/18	10/Nov/18	10	2.00000	\$5.
Laptop	WWI Laptop12 M0120	01/Nov/18	10/Nov/18	10	2.00000	\$5.

SHIPPING INFORMATION

Detail Amount	\$239.60	Pre-Freight Amount	\$239.60
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