RentalLife

User Guide - Englisch

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1. Basic Facts

1.1 What is Rental management?

Obtaining the use of machinery, vehicles or other equipment on a rental basis. This avoids the need to invest capital in equipment. Ownership rests in the hands of the financial institution or leasing company, while the business has the actual use of it. In today’s competitive business world, Commercial operators who require machines on a short-term or one-off basis, or who require a replacement machine. This business are the potential companies that provided with the opportunity to provide the service required or supply the goods requested. They will also need to provide a competitive price for this work.

1.2 When does Rental management start?

The rental management starts when a customer calls the service provider for enquiry and sharing the product details with duration required.

1.3 What does Rental management include?

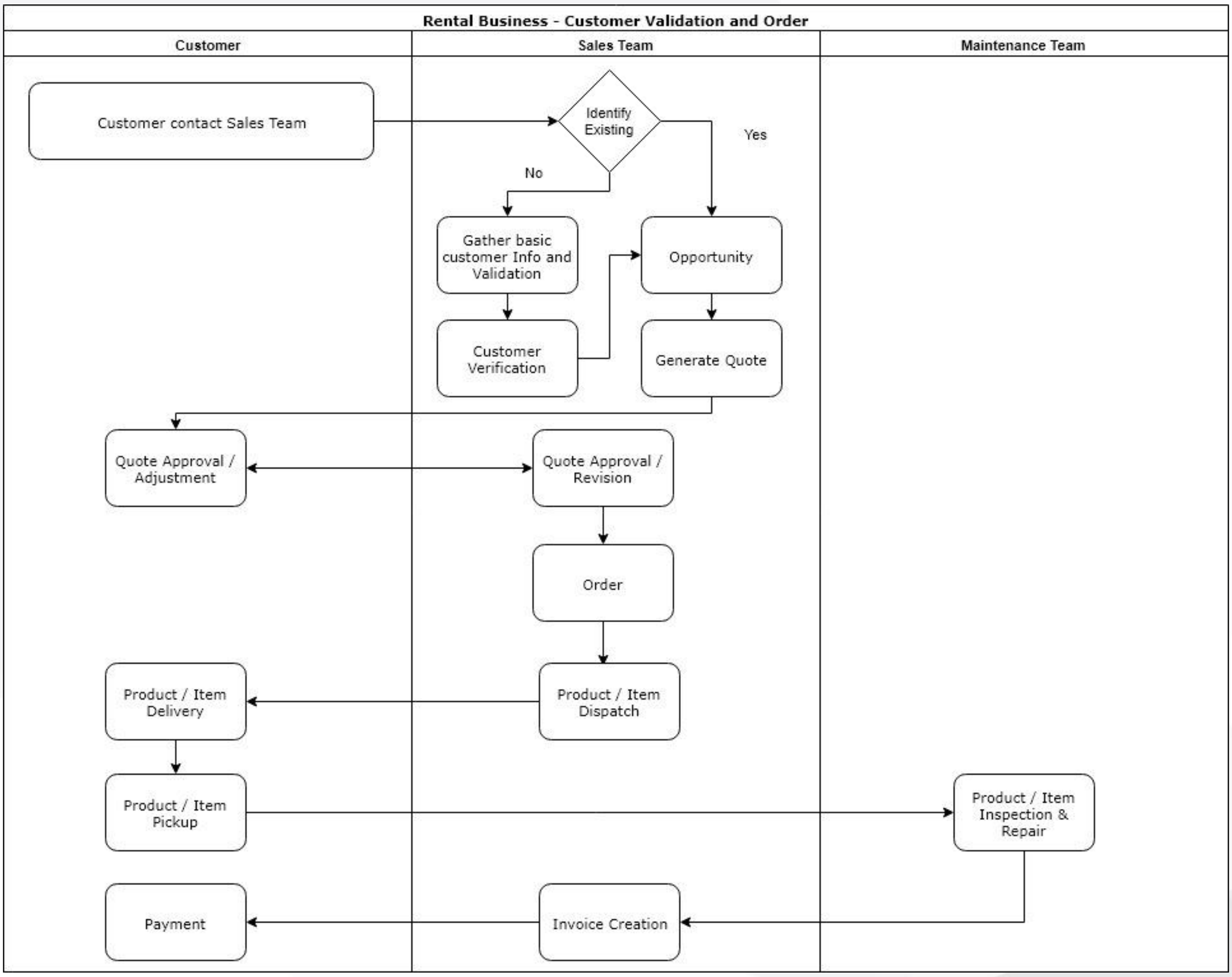
- Customer Validation
- Analyzing the customer requirements.
- Different pricing for different durations
- Customer Offerings (Quote/Order/Invoice)
- Prevent breakdown with regular maintenance
- Managing the asset deprecation

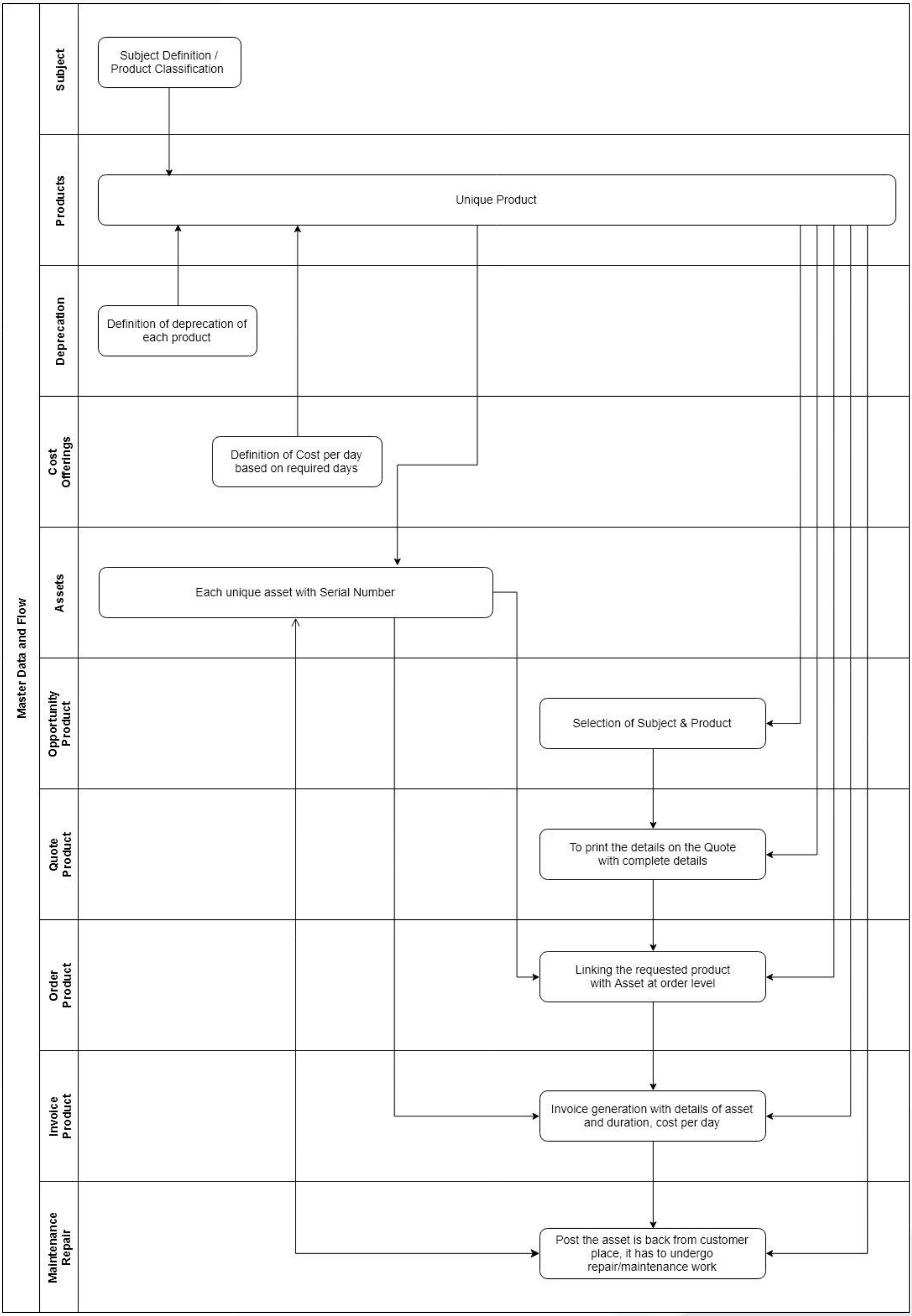
2. Process

2.1 Process Overview

The whole process of rental equipment management starts when a potential customer calls service provider. Customer will provide the details about requirement (such as product/service) and duration (such as from and to dates). Based on the details rent will be calculated as configured at product level. Based on the details the quote/order will be created and item (asset) will be booked for specified timeframe. Once the order fulfills, the invoice will be created and shared with customer.

The system flow for rental equipment management is divided into 2 areas. Master Records and Bookings. The Master Records and Bookings are described as below.




Master Data and Flow
Subject
Products
Deprecation
Cost Offerings
Assets
Opportunity Product
Quote Product
Order Product
Invoice Product
Maintenance Repair
Subject Definition / Product Classification
Unique Product
Definition of deprecation of each product
Definition of Cost per day based on required days
Each unique asset with Serial Number
Selection of Subject & Product
To print the details on the Quote with complete details
Linking the requested product with Asset at order level
Invoice generation with details of asset and duration, cost per day
Post the asset is back from customer place, it has to undergo repair/maintenance work

3. Entity, Attributes, Views and Forms

3.1 Subject

Dynamics 365 includes a subject organizational structure that allow to mark and categorize products.

Create or edit a Subject

1. In Microsoft Dynamics 365 -> Settings -> Business Management -> Subjects
2. Select exiting subject to edit or select the parent subject to add branch
3. Click ok.

3.2 Unit Group

Units are the quantities or measurements that you sell your products or services in. For example, if you sell gardening supplies, you might sell seeds in units of packets, boxes, and pallets. A unit group is a collection of these different units.

Steps to create units in a unit group

1. In Microsoft Dynamcis 365 -> Settings -> Product Catalog -> Unit Groups
2. For new record creation, start with new and specifiy Primary Unit and give name to new unit conversion quantity with primary unit and base unit.
3. Select Save or Save and Close.

3.3 Price List

Price lists tell your sales agents what to charge for your products or services. You can create multiple price lists so that you can maintain separate price structures for different regions you sell your products in or for different sales channels.

Price lists tie the unit, product, and pricing details together, so before you create a price list, make sure the units and products are in place.

Create a Price List

1. In Micrsooft Dynamics 365 -> Settings -> Product Catalog -> Price List
2. Start with New and specify the new Price List name, Start and End Date and Currancy
3. Then add the products to the price list.

3.4 Product

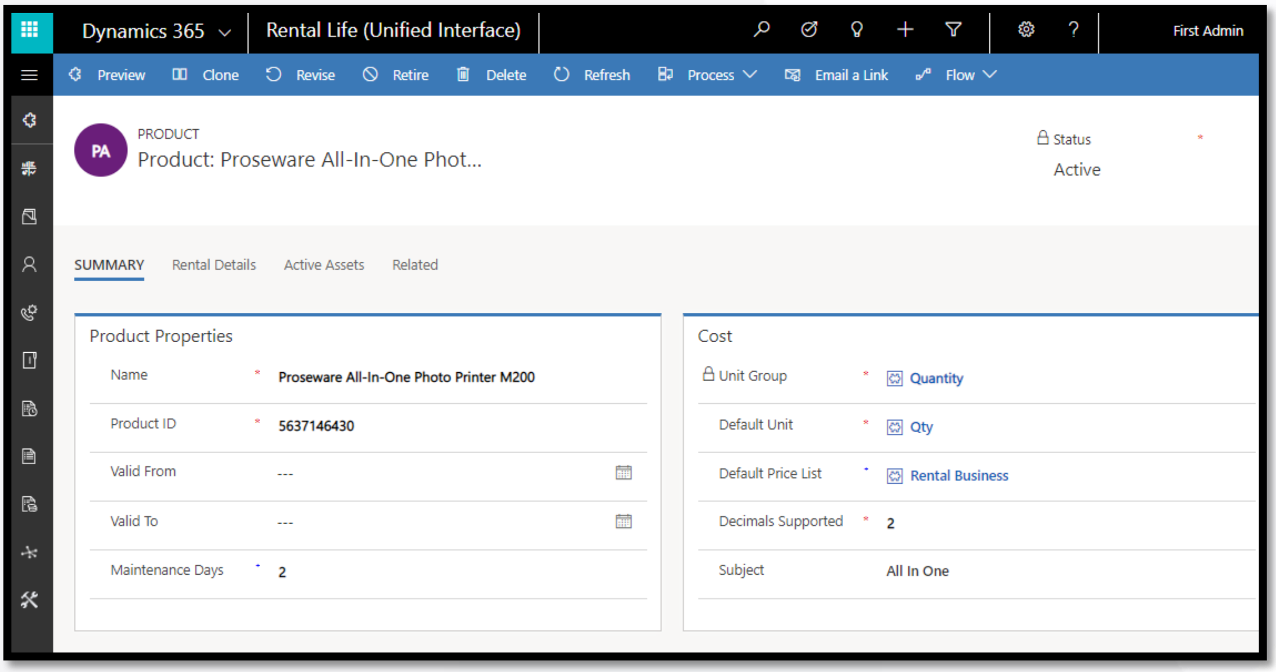
3.4.1 Create a product

Products are the backbone of your business. They can be physical products or services— whatever your organization sells. Your sales reps use the products you create in Microsoft Dynamics CRM to generate sales quotes, marketing campaigns, orders, and invoices. Your customer service reps might also use them when they create customer service cases.

- Make sure that you have one of the following security roles or equivalent permissions: System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager.
- Check your security role a. Follow the steps in View your user profile. b. Don’t have the correct permissions? Contact your system administrator.
- Go to Settings > Product Catalog
- In the Product Catalog area, click Families & Products.
- If you want to create a child product to an existing product family, select the family in the list, and then click Add Product. The selected family becomes the parent family of the new product you’re creating. You can’t change the parent of a product after the product is created.
- Fill in your information:
    - Unit Group: Select a unit group. A unit group is a collection of various units a product is sold in and defines how individual items are grouped into larger quantities. For example, if you’re adding seeds as a product, you may have created a unit group called ”Seeds,” and defined its primary unit as “packet.”
    - Unit: Select the most common unit in which the product will be sold. Units are the quantities or measurements that you sell your products in. For example, if you’re adding seeds as a product, you can sell it in packets, boxes or pallets. Each of these becomes a unit of the product. If seeds are mostly sold in packets, select that as the unit.
    - Click Save. In the Price List Items section, click the Add a Record button and create a price list item for each unit the product is available in.
    - In the Default price list box, select a default price list. Microsoft Dynamics CRM uses this price list for calculations when the associated price list in

the opportunity or order for the product does not contain a price definition of the product.

- If you're creating this product under a family, the product will inherit the properties from its parent family. To change a product's property, in the Product Properties section, open the property by clicking the name, and click Override.
- In the Product Relationships section, click the Add a Record button , and select a related product.
- Click the Save button in the bottom-right corner.
- After you're done adding all the details, make sure to review everything and ensure it's correct. On the command bar, click Preview. The Properties Preview dialog box lets you verify how the product properties will appear to sales agents when they're selling the product or bundle. After you're done verifying, click Done.

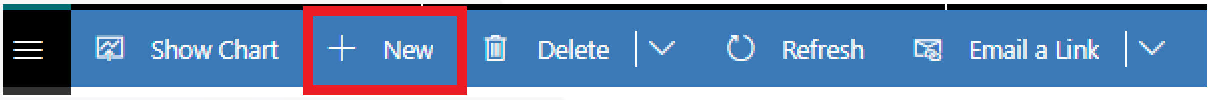


3.5 Lead

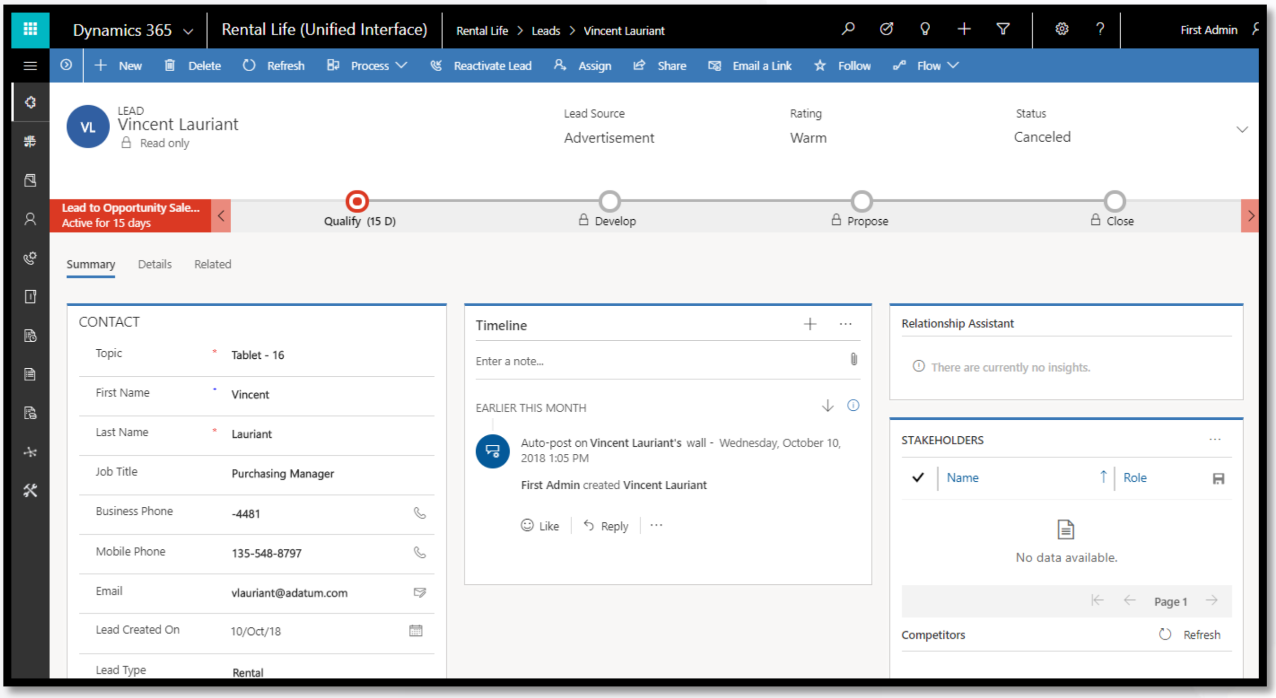
In Microsoft Dynamics CRM, you use leads to keep track of business prospects that you haven't yet qualified through your sales process. A lead can be someone you've never done business with before, or it could be an existing client. You might get leads from different sources, such as advertising, networking, or email campaigns. On this page: Create a lead Edit a lead Additional considerations Tips and tricks Typical next steps

3.5.1 Create a lead

- Go to Sales > Leads
- Click New



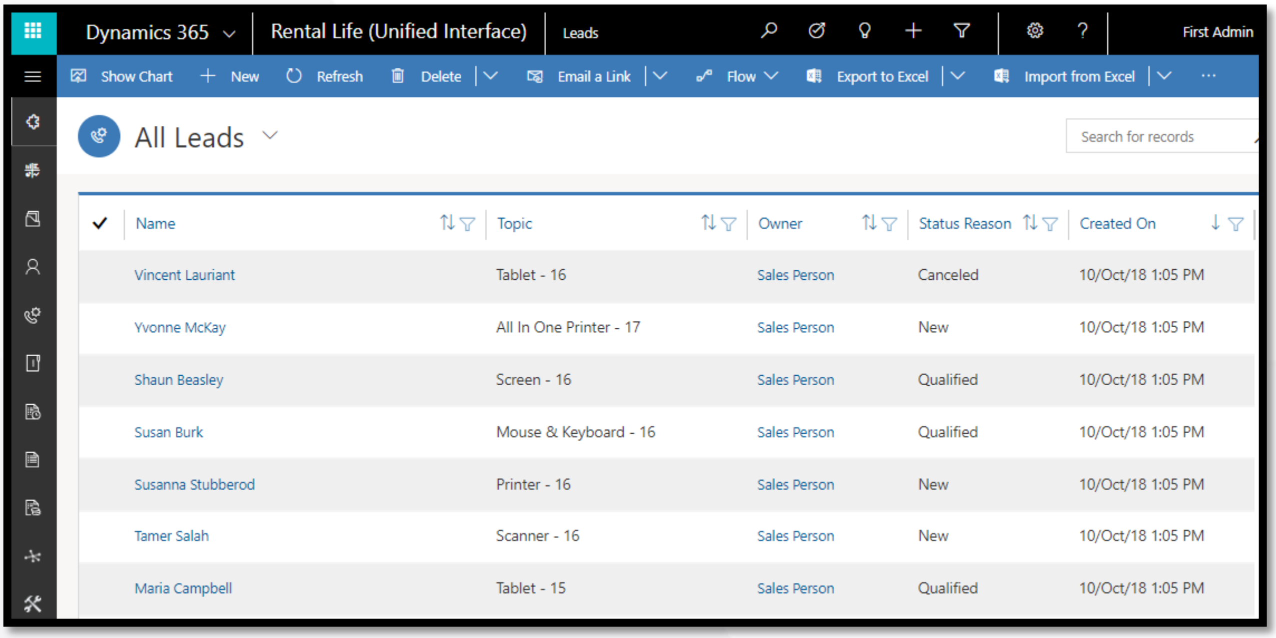
- In the Summary area of the Lead screen, type your lead's company and contact information.
- In the Details area of the Lead screen, type information about your lead's industry and preferred contact method.
- Add any notes and activities (for example, phone calls or emails) related to this lead. More information: Keep track of notes, tasks, calls, or email with activities
- Click the Save button on the bottom right of the screen.



3.5.2 Edit a lead

- Go to Sales > Leads.
- Click the lead you want to edit.
- Add any extra details you have about your lead.

- Click the Save button on the bottom right of the screen.

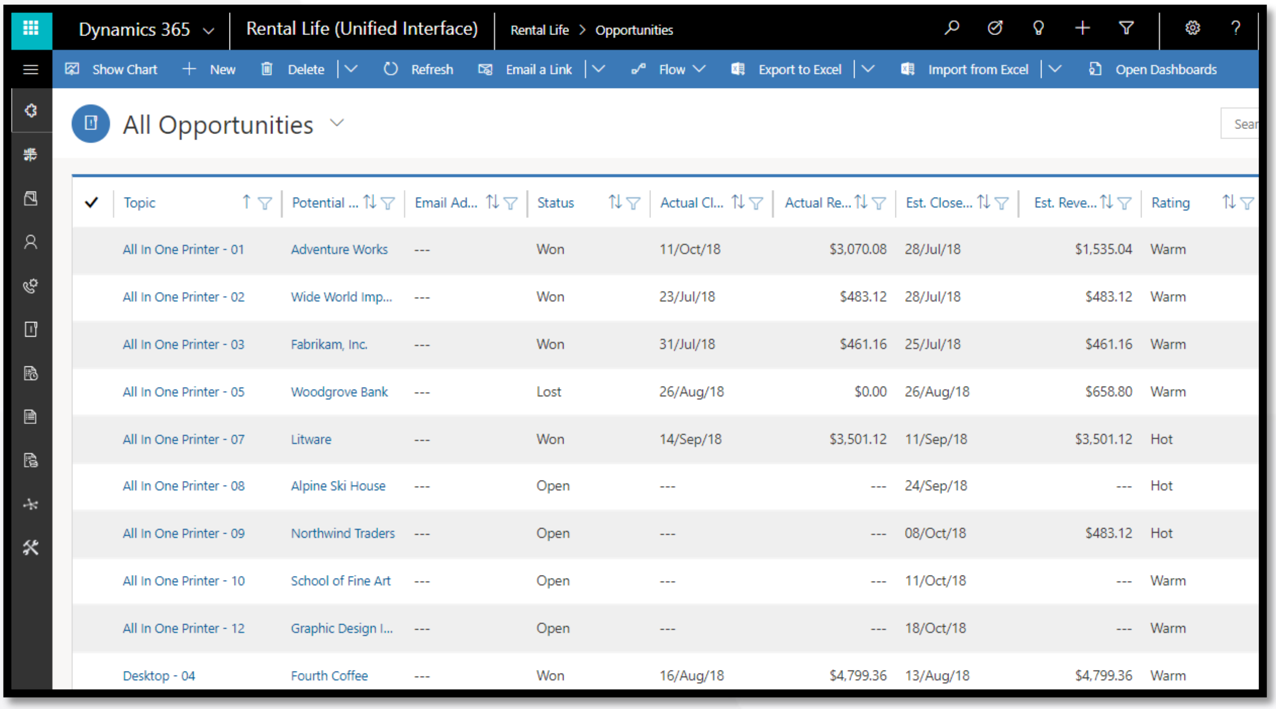


3.6 Opportunity

3.6.1 Qualify a lead and convert it to an opportunity

Does your lead have what you’re looking for—and vice versa? Once you’ve identified the timeframe, budget, purchase process, and decision makers for the sale, it’s time to qualify your lead. Qualifying a lead in Microsoft Dynamics CRM converts it to an opportunity.

Ideally, your leads or prospects should have a need that you can provide a solution for, and have the budget and influence necessary for making the purchasing decision. In addition, you should be able to provide their solution within the time frame they need it.



3.6.1.1 Qualify a single lead

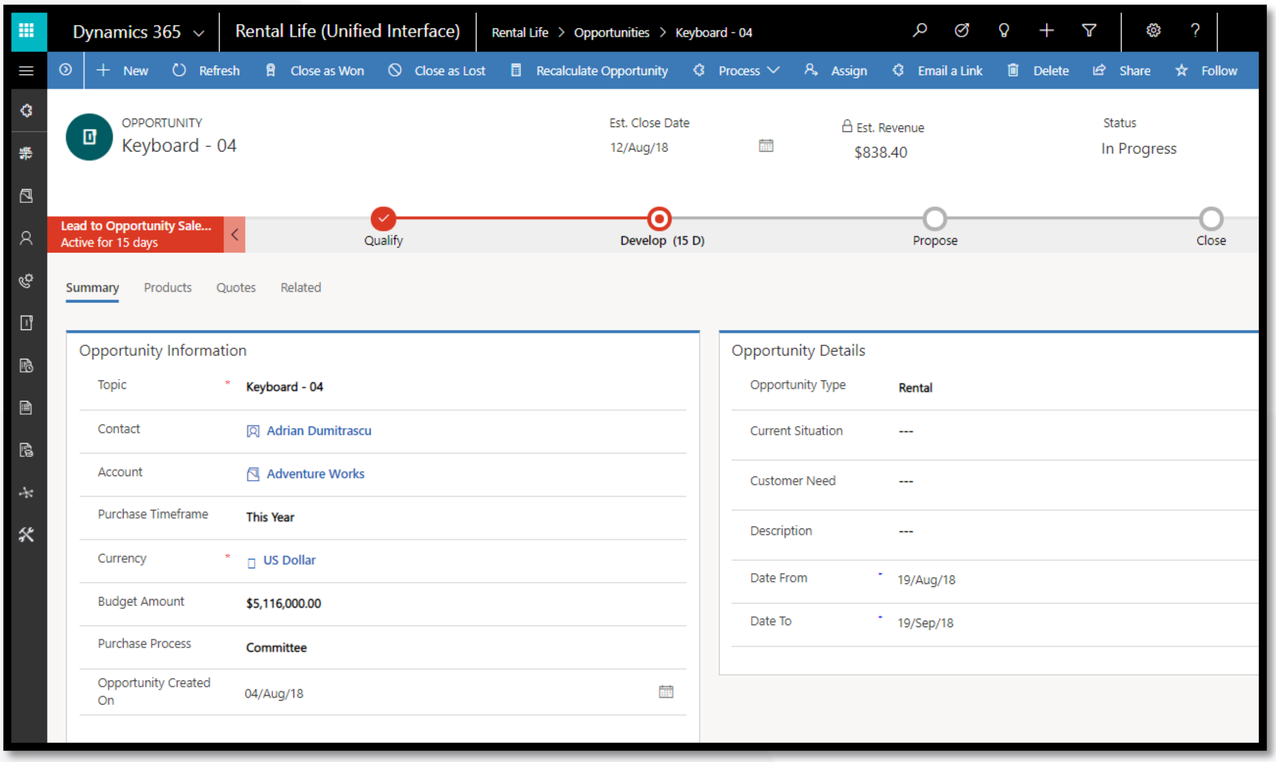
- Go to Sales > Leads
- Select the lead you want to qualify.
- In the Qualify section of the sales process bar, type in all applicable information.
- Click Qualify at the top of the Lead screen.
- Click the Save button at the bottom right of the screen.

3.6.1.2 Qualify multiple leads

- Go to Sales > Leads
- Select the check box next to all leads that you want to qualify.
- Click Qualify at the top of the screen

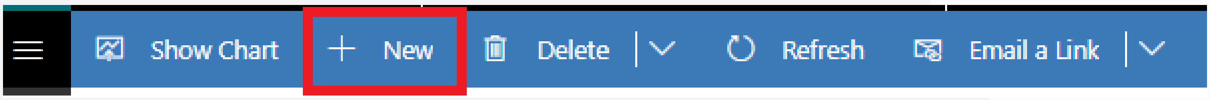
3.6.2 Create or edit an opportunity

An opportunity is a lead who is now almost ready to buy—in other words, it’s a deal that you’re ready to win. At this point in the sales process, you’re most likely in either the Develop or Propose stage. More information: Nurture sales from lead to order



3.6.2.1 Create an opportunity

- Go to Sales > Opportunities
- Choose New



- In the Summary area of the Lead screen, type your lead’s company and contact information
- In the Details area of the Lead screen, type information about your lead’s industry and preferred contact method
- Add any notes and activities (for example, phone calls or emails) related to this lead. More information: Keep track of notes, tasks, calls, or email with activities
- To add stakeholders, in the Stakeholders area, choose +
- To add sales team members, in the Sales Team area, choose +
- To add competitors, in the Competitors area, choose +
- To add products, in the Products area, choose +
- To add a quote, in the Quotes area, choose +
- Choose the Save button on the bottom right of the screen.

3.6.2.2 Edit an opportunity

- Go to Sales > Opportunities
- Choose the opportunity you want to edit.
- Add any extra details you have about your lead.
- Choose the Save button on the bottom right of the screen
-

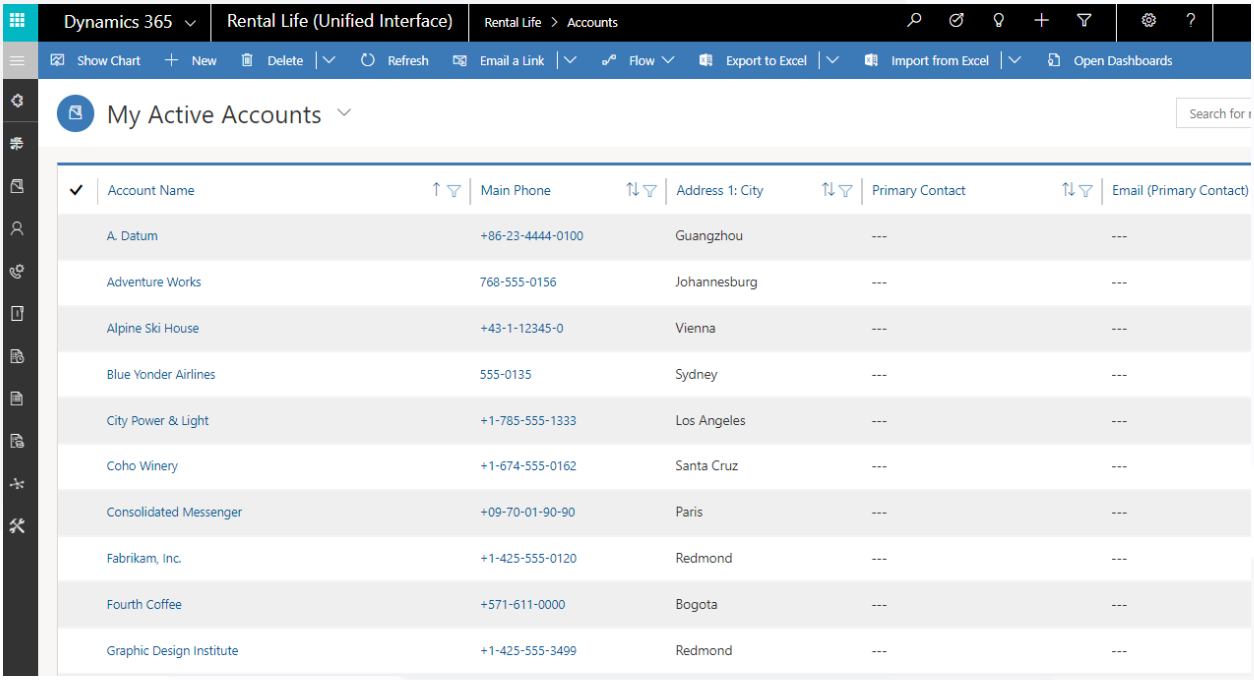
3.6.2.3 Close an opportunity as won or lost

If your customer has accepted your proposal, congratulations! Whether your customer accepted or declined your proposal, however, it's now time to close that opportunity.

- Go to Sales > Opportunities
- Choose the opportunity you want to edit.
- To close your opportunity as won, choose Close as Won at the top of the Opportunity screen. -OR - To close your opportunity as lost, choose Close as Lost at the top of the Opportunity screen.

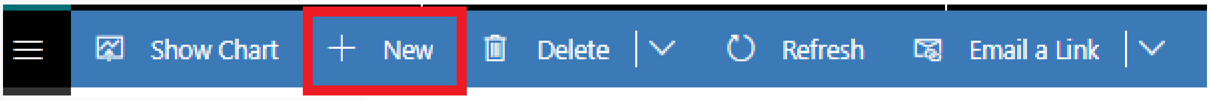
3.7 Account

Create or edit an account If you work mostly with other companies, you'll probably want to use accounts to keep track of them. You can also use accounts to keep track of any vendors you do business with.



3.7.1 Create an account

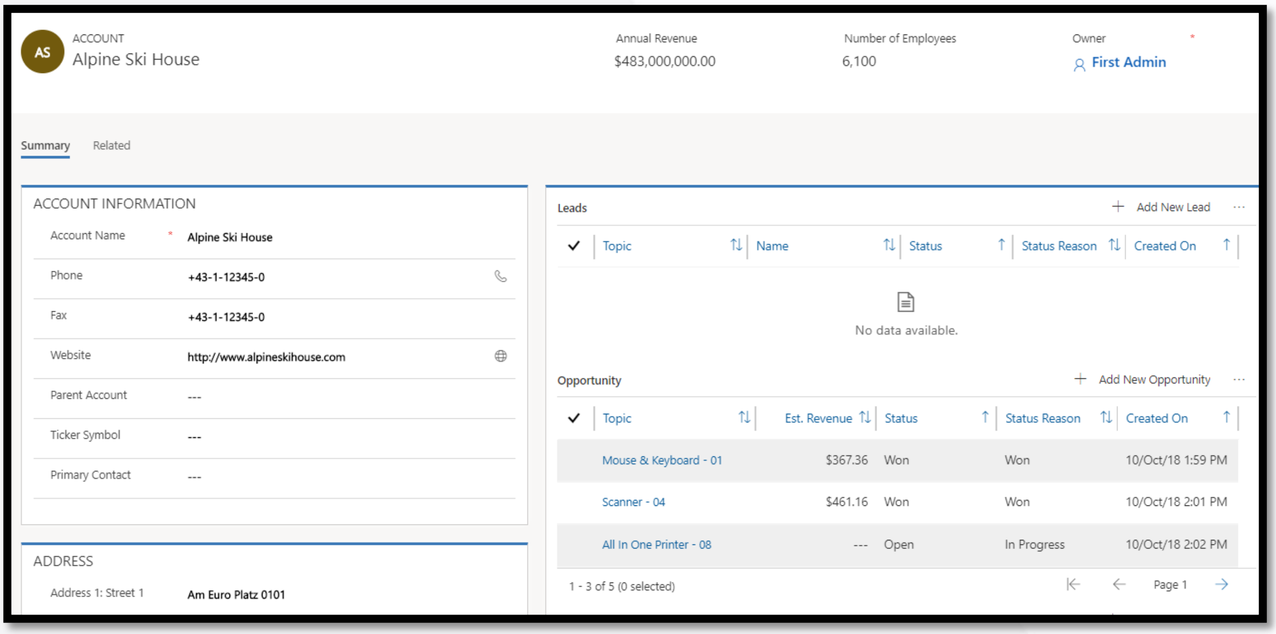
- Go to Sales > Accounts
- Choose New



- Fill in your information. Use the handy tooltips as a guide.
- Click Save.

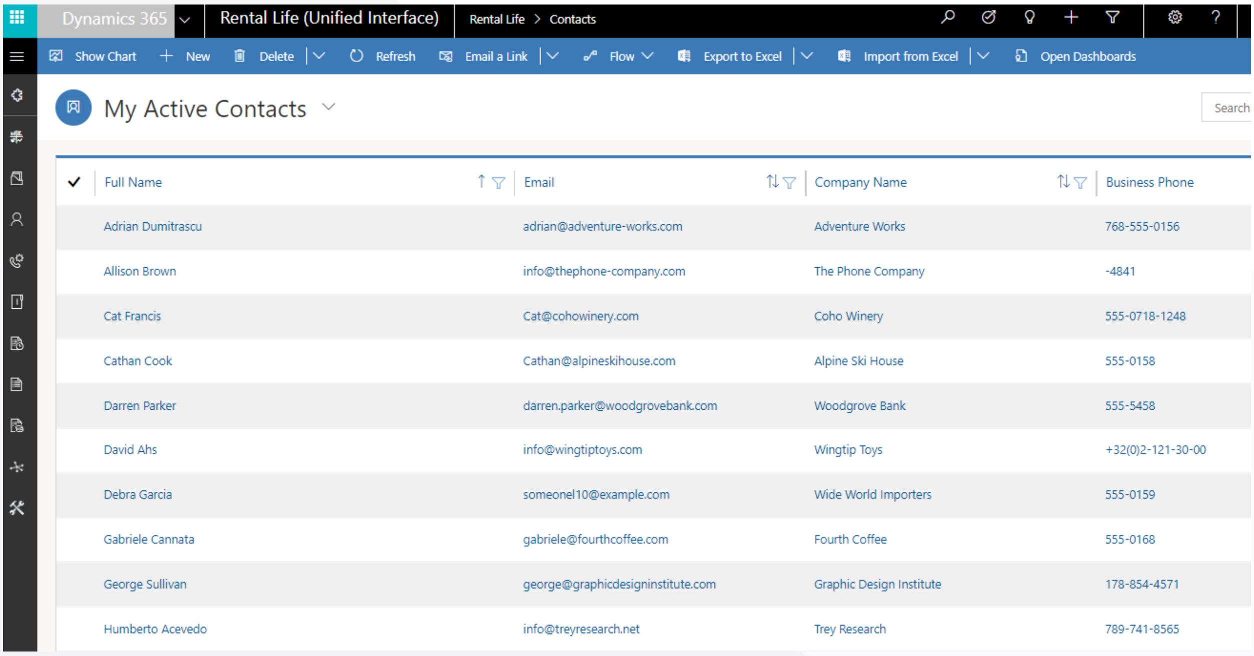
3.7.2 Edit an account

- Go to Sales > Accounts
- Open the account and change the information that you want
- Click Save.



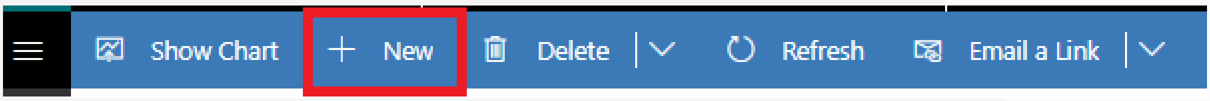
3.8 Contact

Use contacts to keep track of the people you do business with.



3.8.1 Create a contact

- Go to Contacts
- Choose New



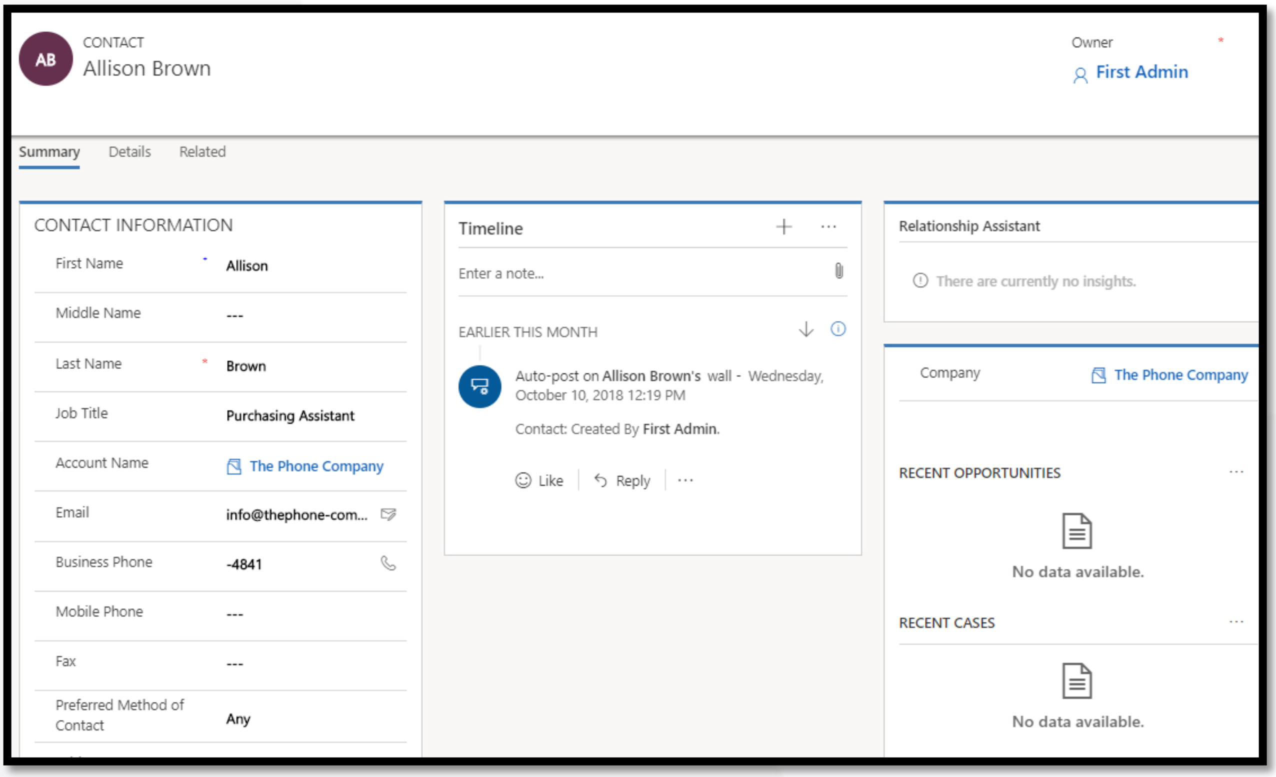
- Fill in your information.
- Click Save.

3.8.2 Edit a contact

- Go to Contacts
- Open the contact and change the information that you want.
- Click Save. Quote

3.8.3 View a contact

- Go to Contacts
- You'll see a list of your active contacts. You may need to scroll to see the whole list.
- Click or tap a person's name to see the details for the contact.



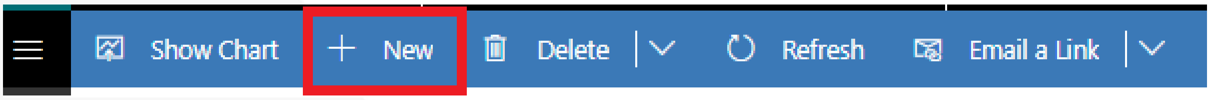
3.9 Quote

3.9.1 Create a quote from an opportunity

- Go to Sales > Opportunities
- Choose the opportunity you want to add a quote to.
- In the Quotes area of the Opportunity screen, choose +
- To add products from your opportunity to your quote, click Get Products at the top of the Quote screen and choose OK.
- Type shipping and payment information in the Shipping Information area of the Quote screen.
- Type the billing and shipping addresses in the Addresses area of the Quote screen.
- Choose the Save button at the bottom right corner of the screen.
- When your quote is ready to send to your customer, choose Activate Quote at the top of the screen.

3.9.2 Create a quote

- Go to Sales > Quotes
- Choose New



- Add your customer's contact information.
- To add products from your opportunity to your quote, choose Get Products at the top of the Quote screen and choose OK.
- In the Shipping Information area, type shipping details.
- In the Addresses area, type shipping and billing addresses.
- Choose the Save button at the bottom right corner of the screen.
- When your quote is ready to send to your customer, choose Activate Quote at the top of the screen.

3.9.3 Edit a quote

- Go to Sales > Quotes
- Choose the quote you want to edit.
- Add or change any details about your quote.
- Choose the Save button at the bottom right corner of the screen.
- When your quote is ready to send to your customer, choose Activate Quote at the top of the screen.

3.10 Order

3.10.1 Create an order from a quote

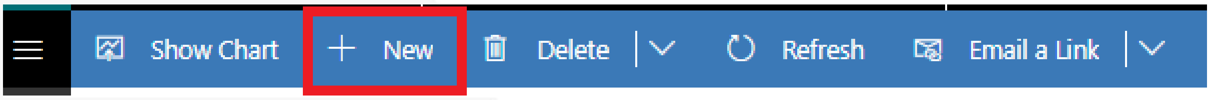
Typically, you convert a quote that you have won into an order. Start with an active quote. Note that once a quote is accepted, you won't be able to revise it.

- Go to Sales > Quotes
- Select the quote you want to create an order from.
- Click Create Order at the top of the Quote screen.
- Add a description and indicate whether or not you want to close the opportunity in the Create Order window and click OK.
- To add products from your opportunity to your quote, click Get Products at the top of the screen, select your opportunity, and click OK.
- Click the Save button at the bottom right corner of the screen.

3.10.2 Create an order

You can create an order that is based on your communication with a customer, instead of an accepted quote.

- Go to Sales > Orders
- Click New



- Add your customer's contact information.
- To add products from your opportunity to your order, click Get Products at the top of the screen, select your opportunity, and click OK.
- In the Shipping Information area, type shipping details.
- In the Addresses area, type shipping and billing addresses.
- Click the Save button at the bottom right corner of the screen.
- You close an order by either fulfilling the order or canceling the order. Products or services that are shipped are fulfilled. You should cancel orders for any products or services that are not shipped. You can't update or change an order after it has been closed or if it has been partially or completely fulfilled.

3.10.3 Edit an order

- Go to Sales > Orders
- Select the order you want to edit.
- Add or change any details about your order.
- Click the Save button at the bottom right corner of the screen.

3.11 Invoice

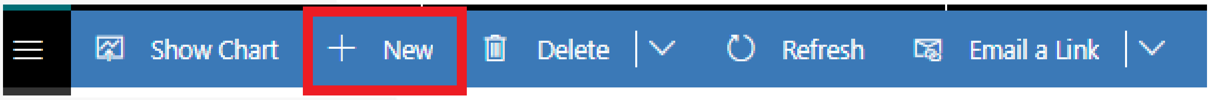
3.11.1 Create an invoice from an order

- Go to Sales > Orders.
- Choose the order you want to create an invoice from.
- Choose Create Invoice at the top of the screen.
- Review the contents of the invoice and make any additions or corrections before sending to your customer.

3.11.2 Create an invoice

- Go to Sales > Invoices.

- Choose New



- Add your customer's contact information.
- Choose Save at the top left to create the invoice record.
- To add products from your opportunity to your order, choose Get Products at the top of the screen, select your opportunity, and click OK.
- To add information about a product on the invoice, in the Products area, choose the Add a Product button , and then choose one of the following options: Existing Product. A product created in the product catalog that is associated with a price list. Write-in Product. A product that is available but not a part of the product catalog. Get Products. Select products from a previously created opportunity.
- You need to enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM doesn't automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.
- In the Shipping Information area, type shipping details.
- In the Addresses area, type shipping and billing addresses.
- Choose the Save button at the bottom right corner of the screen.
- You close an invoice either by canceling the invoice or setting the invoice status as paid.

3.11.3 Edit an invoice

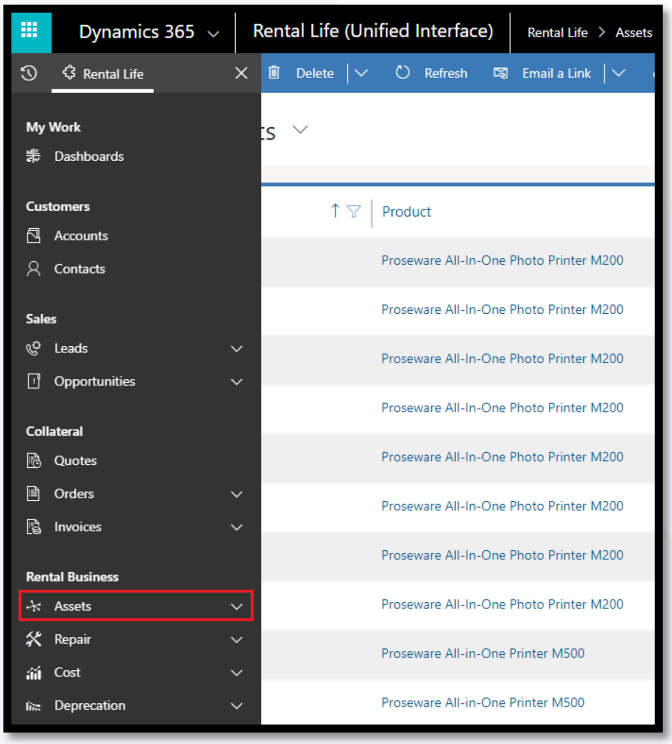
- Go to Sales > Invoices.
- Choose the invoice you want to edit.
- Add or change any details about your invoice.
- Choose the Save button at the bottom right corner of the screen.

3.12 Assets

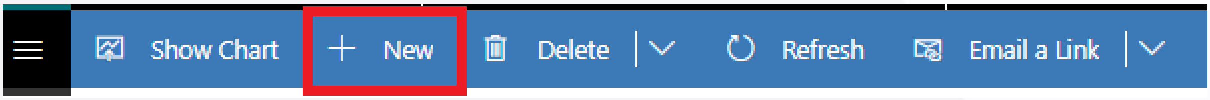
An asset is a resource with economic value that an individual, corporation or country owns or controls with the expectation that it will provide a future benefit. Assets are reported on a company's balance sheet and are bought or created to increase a firm's value or benefit the firm's operations. An asset can be thought of as something that, in the future, can generate cash flow, reduce expenses or improve sales, regardless of whether it's manufacturing equipment or a patent.

3.12.1 Create an Asset

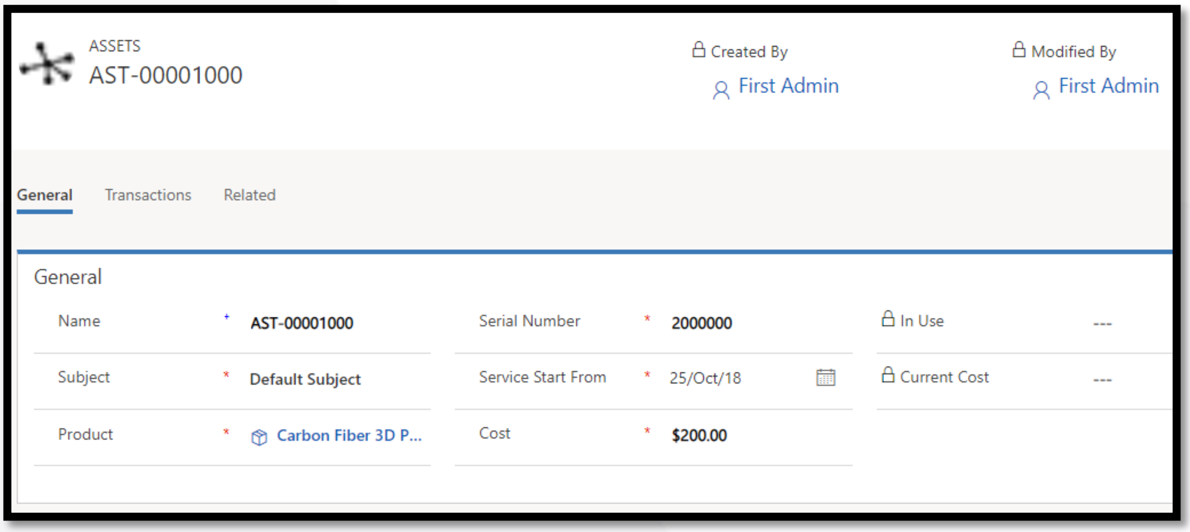
- Go to Assets



- Click on New and fill out the information



1. Start with New and specify the Subject, Product, Serial Number, Service from date and Cost while added to service
2. On save, the name will be automatically created

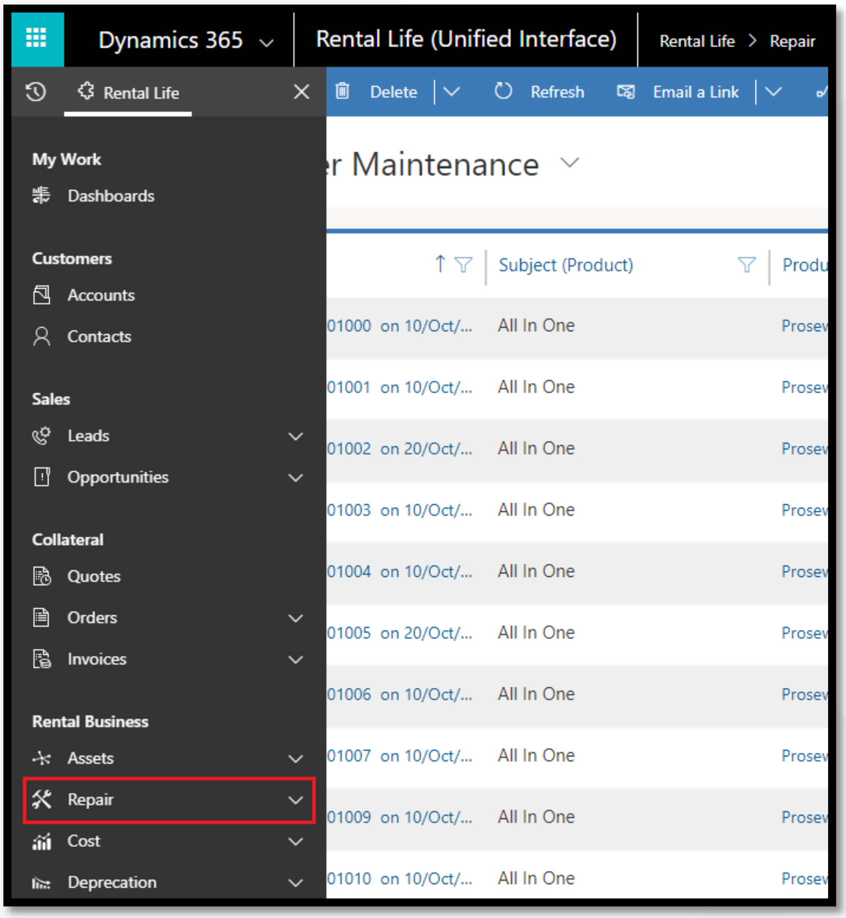


- Click on Save

3.13 Repair

Once the asset return from the customer location/rental it has to go throug the repair/maintenance check action and if required, the asset will be repaired and once the asset is ready then it will update as stock again.

- Go to Repair



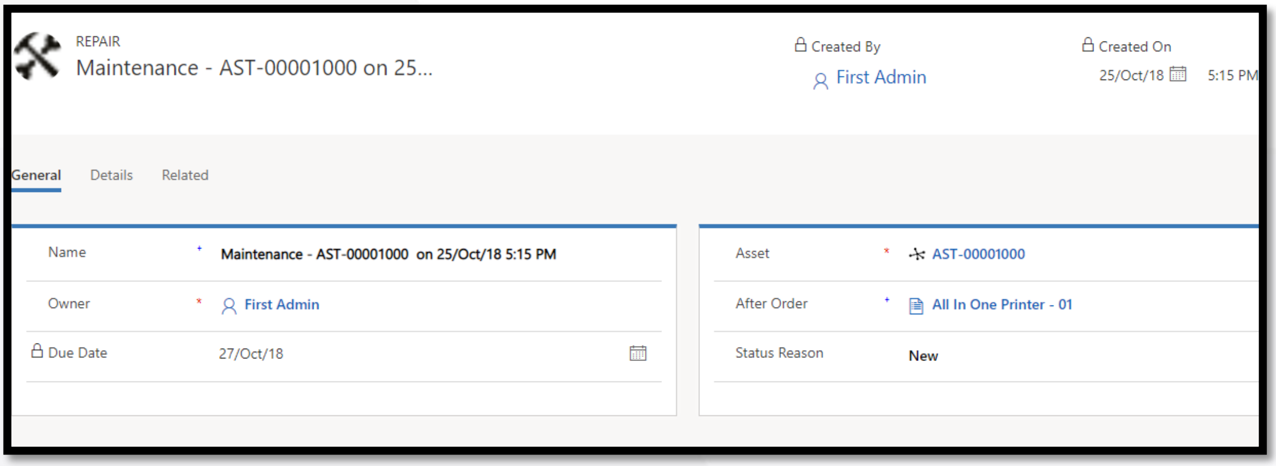
- Click on New and fill out the information

- Choose an Asset
- Fill the Order which is related to the Repair

Update Repair

1. In Micrsooft Dynamics 365 -> Rental -> Repair
2. Select the repair task.

3. Due date will be calculated based on the Repair task created on + maintenance time (define in product)
4. Once the status is set to "Completed" then the asset will be bringing to Stock and can be assegined to new order.



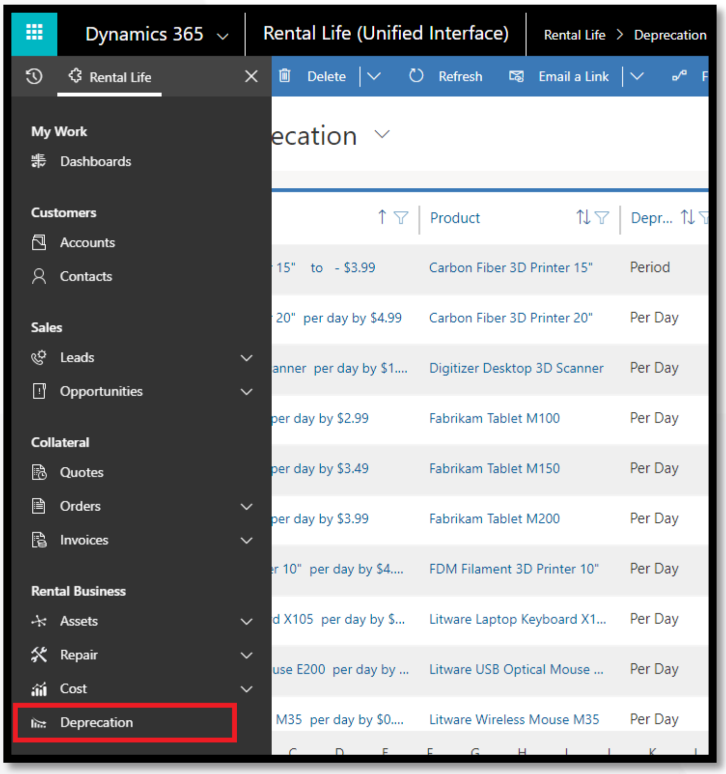
- Click on Save

3.14 Deprecation

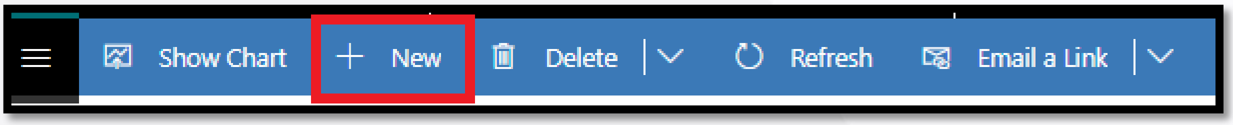
Deprecation is custom object linked to product entity. Used to identify the current asset value. Once the new asset register in system, the deprecation will be calculated based on the duration (rented) from current date. The deprecation can be defined as per day or based on product age.

3.14.1 Create a Deprecation

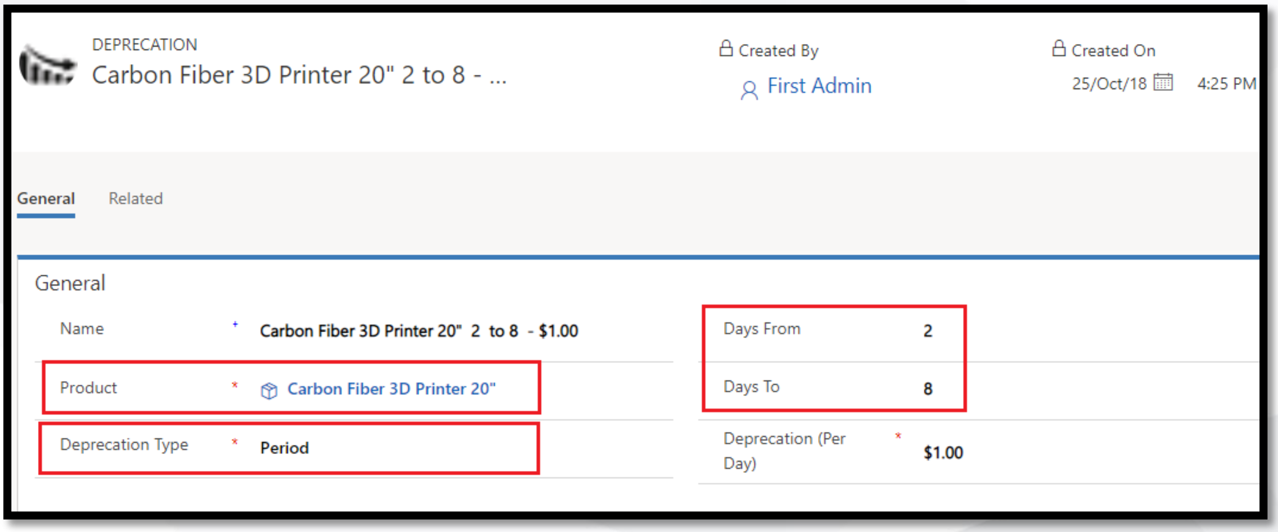
- Go to Deprecation

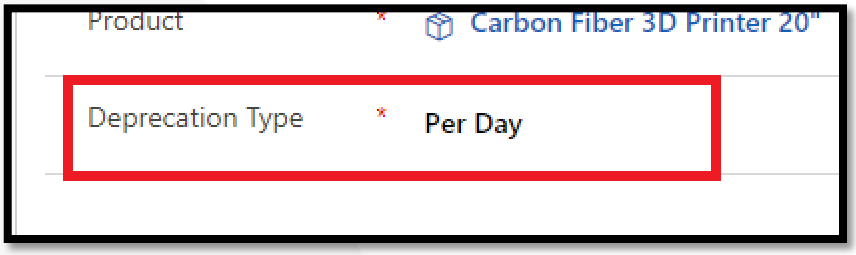


- Click on New and fill out the information



-
- Choose a Product
- The Deprecation can be **Per Day** or for **Period**. This you can choose in the **Deprecation Type** field





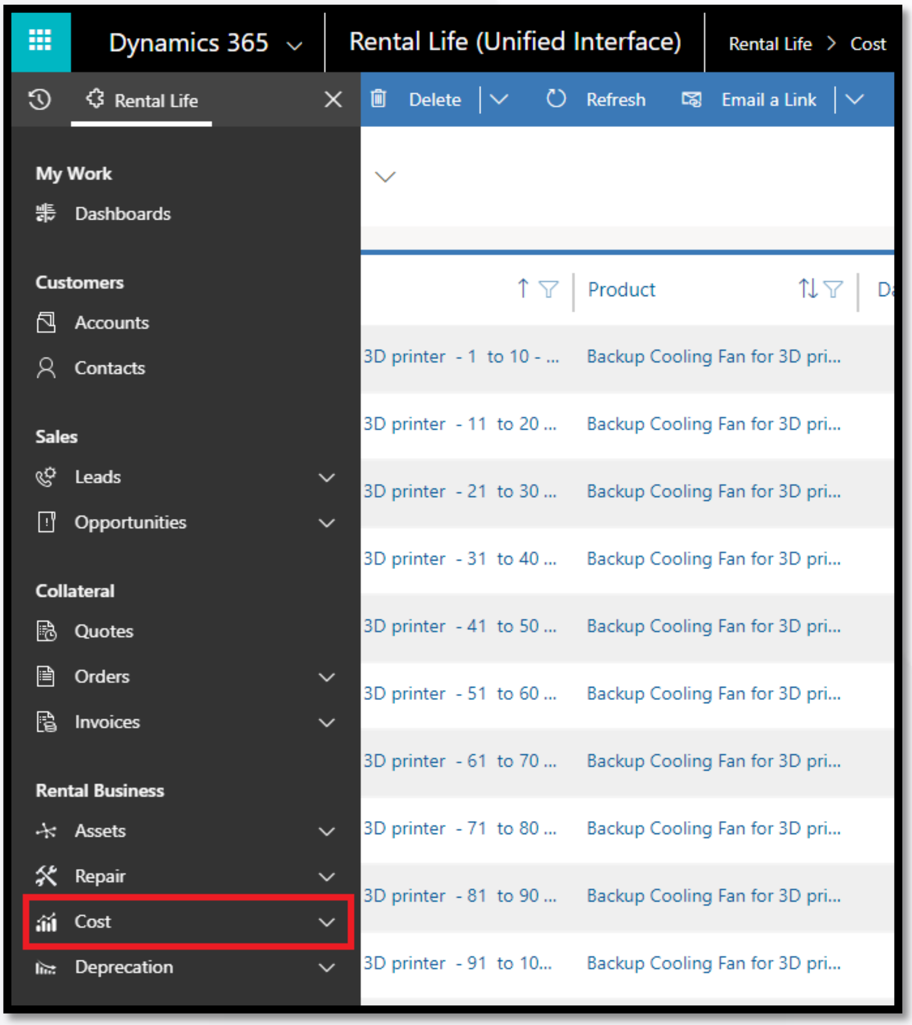
- Click on Save

3.15 Cost

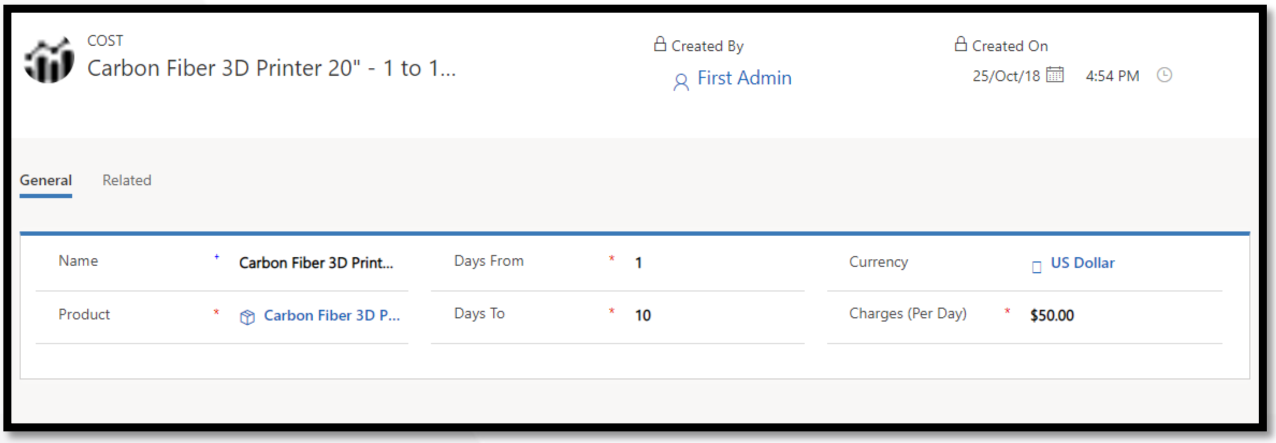
Cost is custom object linked to product used to maintain the asset rental cost by duration. Once the new order product added into the system, the no of days will be calculated and based on the duration the offerings will be linked to order line.

3.15.1 Create a Cost

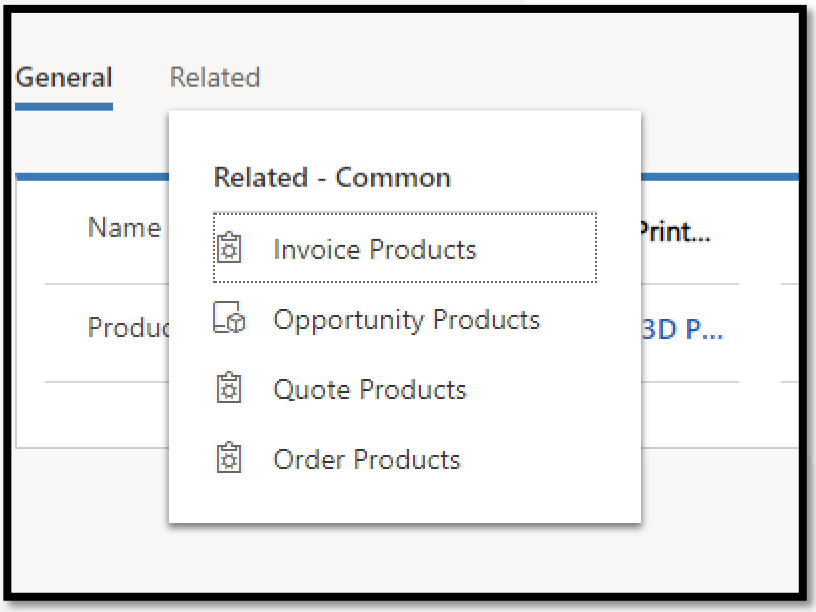
- Go to Cost



- Click on New and fill out the information
- Choose a Product
- Fill out the Days from and Day To
- Fill in the Charges per Day



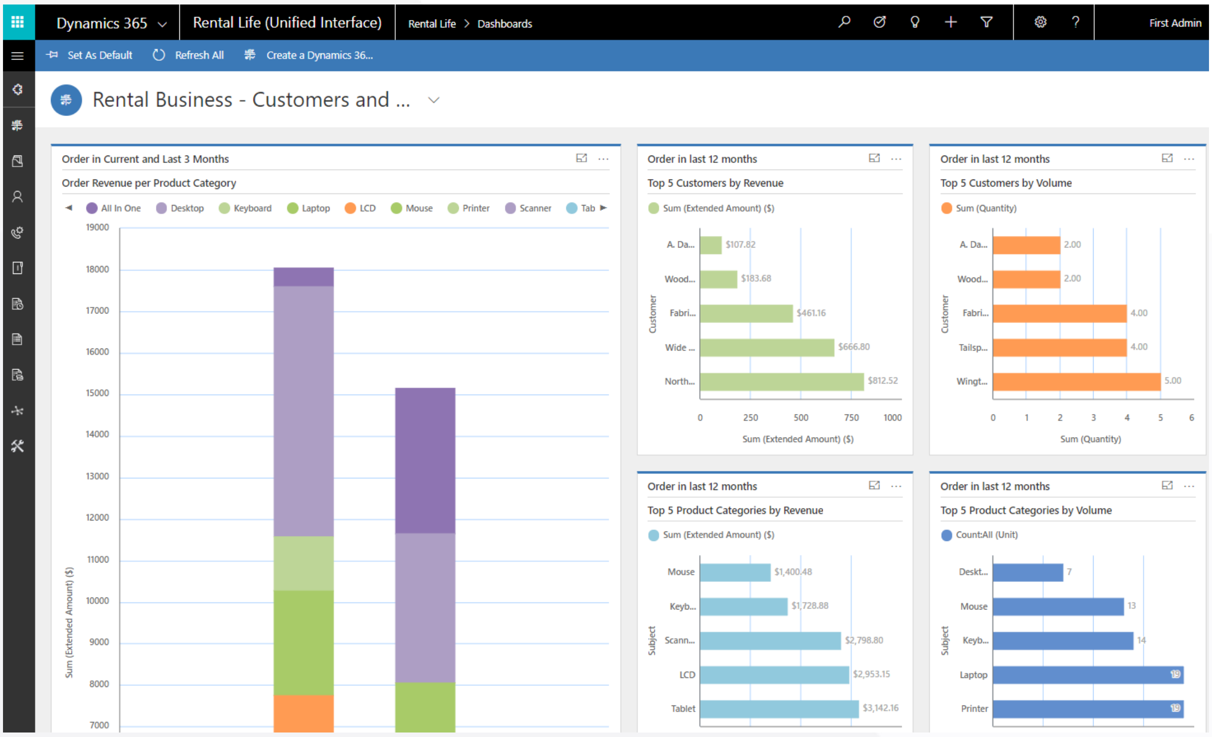
- In the Related Area you can see related Invoice, Opportunity, Quote and Order Products



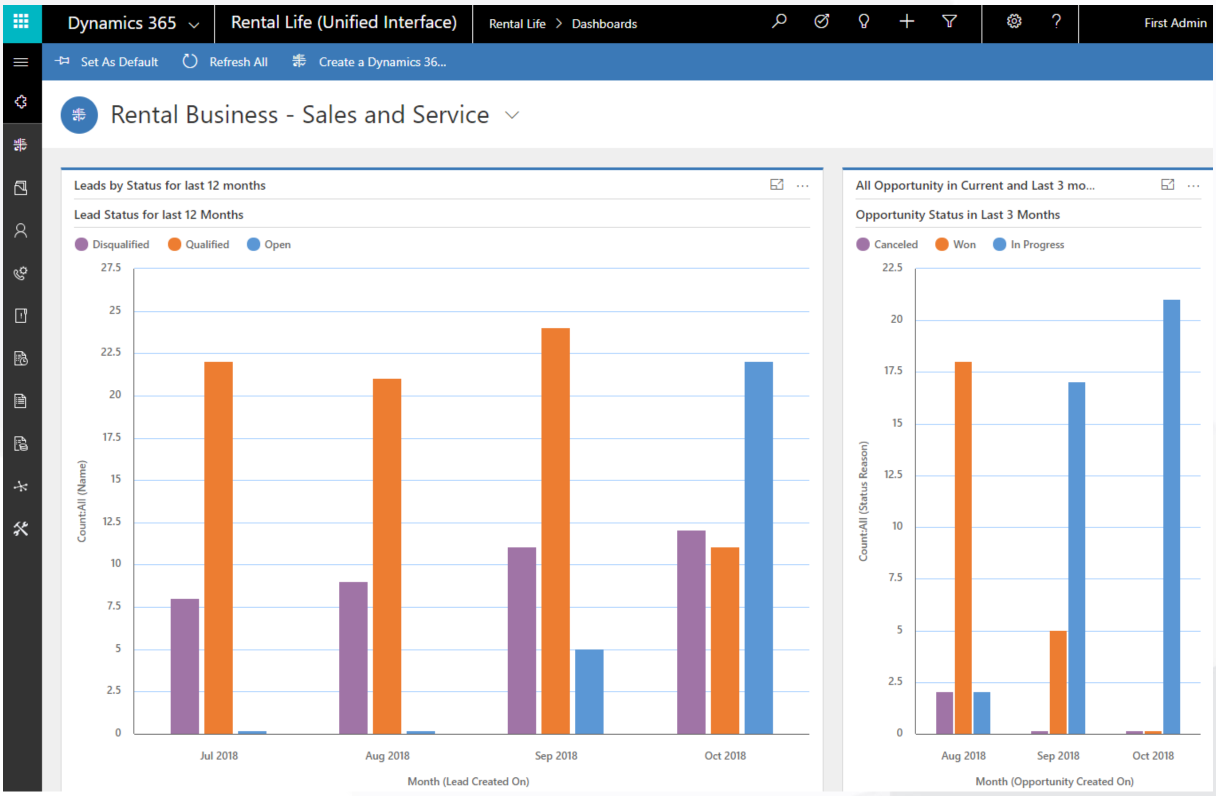
- Click on Save

3.16 Dashboards

3.16.1 Customer and Product Information



3.16.2 Sales and Service



4. Addiotnal Functionality

This section to describe the additonal options to manage the things properly

4.1 Security Role

To perform the daily task and keep master records up to date, the users with specific security roles can update the infomration in system

4.1.1 Rental Manager

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

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

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

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

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 Custom Apps

With PowerApps, custom business apps are comprised of components such as entities, dashboards, forms, views, charts, and business processes.

4.2.1 Web App

This is the classic Dynamics 365 web browser client.

4.2.2 Unified Interface

This is the newer responsive web browser client that has a similar interface across PC and mobile devices.