

PREXA³⁶⁵

USER GUIDE

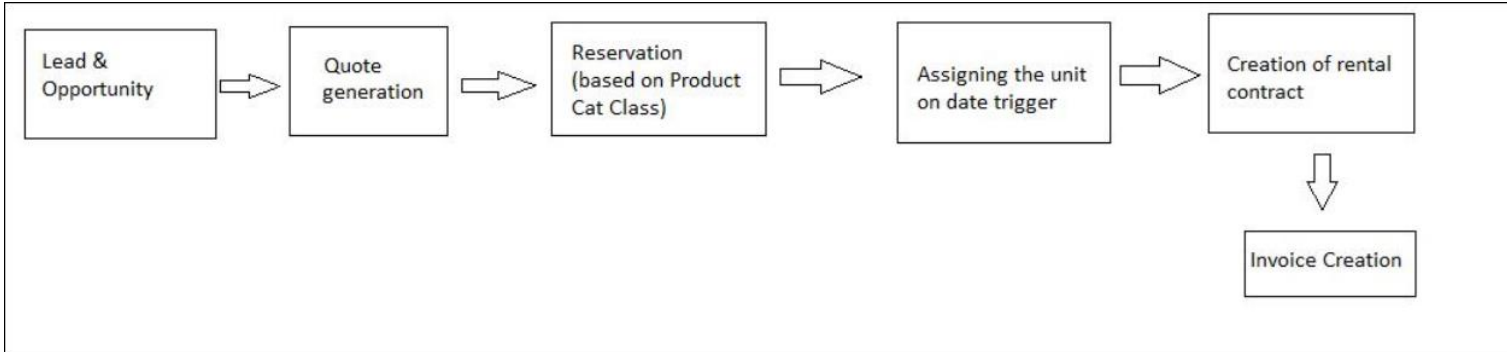
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Objective

This document contains detail end to end flow of the rental product called PREXA365.

End to End flow of Prexa 365:

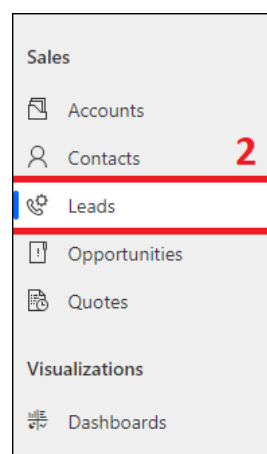
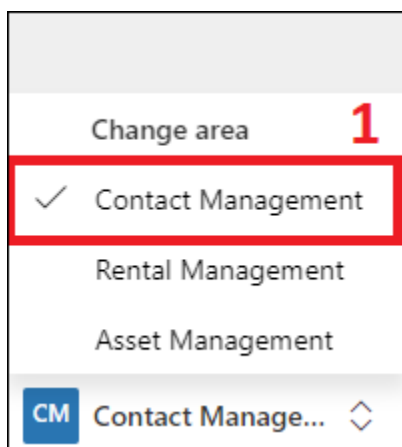


1. Contact Management



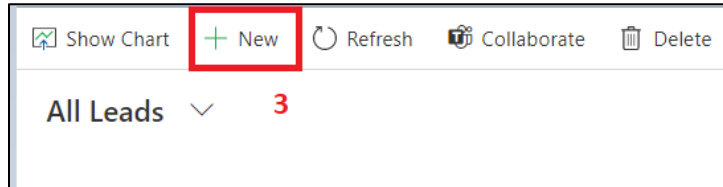
Contact Management flow: Lead (Account and Contact) → Opportunity (Quote)

- From the left navigation pane, pick the contact management area and select leads entity as shown in the below screenshot.

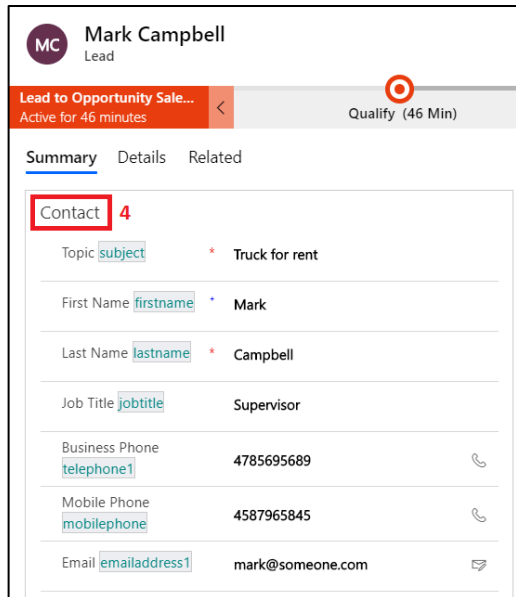


1.1 Lead Creation:

Once you select the leads entity, on the same screen in the header you will find new button, by clicking new you will open a form.



On the lead form, enter the details of the Contact, Account and Save the record



Mark Campbell
Lead

Lead to Opportunity Sale...
Active for 46 minutes

Qualify (46 Min)

Summary Details Related

Contact 4

Topic **subject** * Truck for rent

First Name **firstname** * Mark

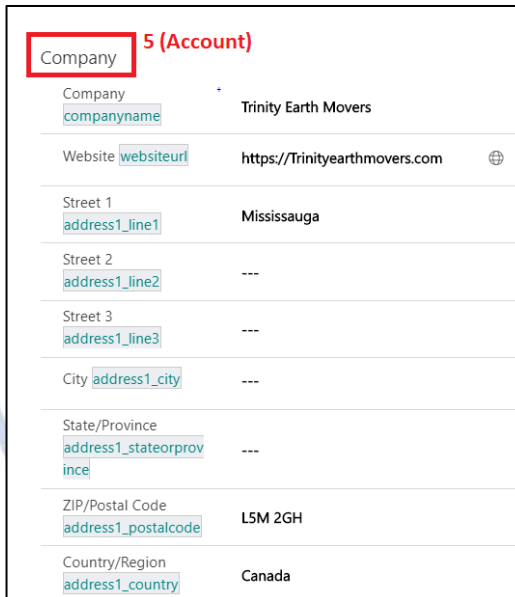
Last Name **lastname** * Campbell

Job Title **jobtitle** Supervisor

Business Phone **telephone1** 4785695689

Mobile Phone **mobilephone** 4587965845

Email **emailaddress1** mark@someone.com



Company 5 (Account)

Company **companyname** Trinity Earth Movers

Website **websiteurl** https://Trinityearthmovers.com

Street 1 **address1_line1** Mississauga

Street 2 **address1_line2** ---

Street 3 **address1_line3** ---

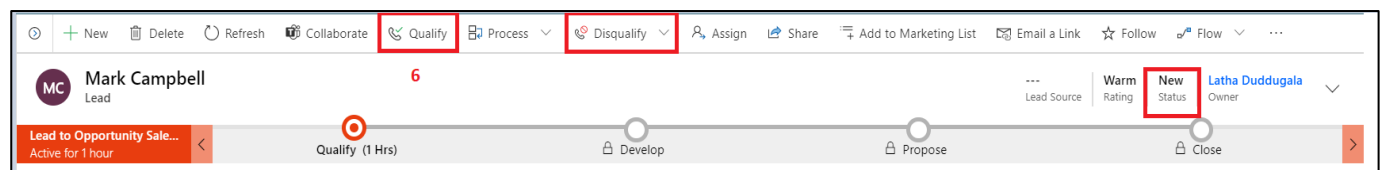
City **address1_city** ---

State/Province **address1_stateorprovince** ---

ZIP/Postal Code **address1_postalcode** L5M 2G8

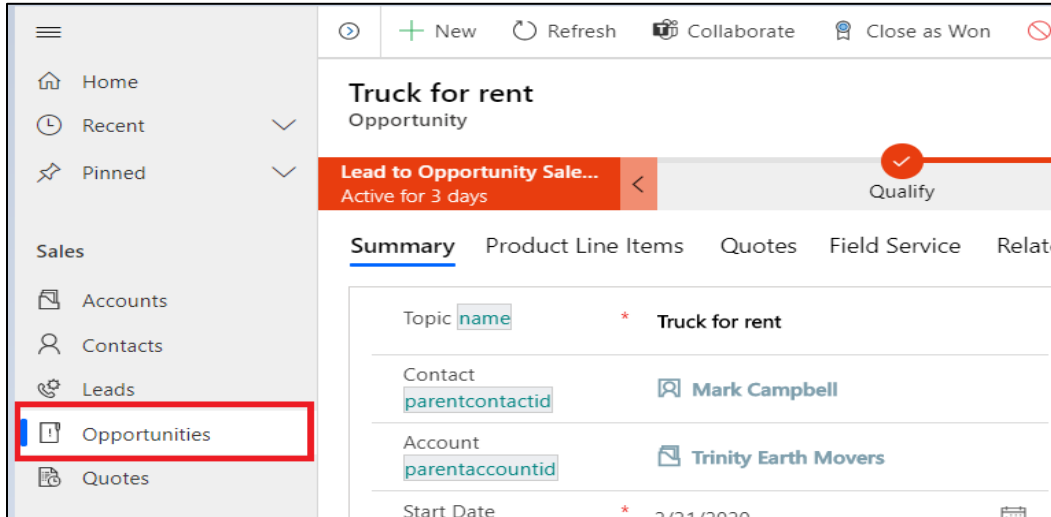
Country/Region **address1_country** Canada

- Once the lead is created, the you can **qualify or disqualify** the lead to proceed further or change the status of the lead as you progress from **New to Contacted**.
- Considering that qualify is selected, then the status is changed to **qualified** and an opportunity record will be created with these subject, contact and account.



1.2 Opportunity Creation:

- Once a lead is qualified an opportunity record is created in the opportunity entity as shown in the screenshot below.



The screenshot shows the Alphavima application interface. On the left, a sidebar menu lists 'Home', 'Recent', 'Pinned', 'Sales', 'Accounts', 'Contacts', 'Leads', 'Opportunities' (highlighted with a red box), and 'Quotes'. The main content area displays the 'Truck for rent' Opportunity form. The form has a status bar with 'Lead to Opportunity Sale...' and 'Active for 3 days'. Below this, the 'Summary' tab is active, showing fields for Topic (name), Contact (parentcontactid), Account (parentaccountid), and Start Date (2/21/2020). The 'Qualify' button is visible in the top right corner.

- Once the opportunity entity is selected, an opportunity form will open, some of the details like Contact and Account will be auto populated.
- Enter other details like state date and end date, which would be the expected start date and end date of the Rental Contract.
- A day prior to the start date an email will be sent to owner of this record to generate the Reservation as I have highlighted in the screenshot.

[New](#)
[Refresh](#)
[Collaborate](#)
[Close as Won](#)
[Close as Lost](#)
[Recalculate Opportunity](#)
[Convert to Reservation](#)

Equipment for Rent

Opportunity

Lead to Opportunity Sale... Completed in 12 minutes

[Qualify](#)
[Develop](#)

[Summary](#)
[Product Line Items](#)
[Quotes](#)
[Related](#)

Topic **Equipment for Rent**

Contact **Alex Campbell**

Account **Tech Data**

Start Date 2/19/2020 11:52 AM
End Date 2/20/2020 10:00 AM
Currency USD
Description

Opportunity Details

Current Situation

Customer Need

Proposed Solution

- The next is to move to the next tab called Product Line Items, based on the duration (difference between the start date and end date) must pick the Price List (could be Weekly or Monthly).
- The next step is to add the products in the category level so click on the Add Product button (Step 3).

[Summary](#)
[Product Line Items](#)
[Quotes](#)
[Field Service](#)
[Related](#)

Price List **Monthly Price List**

Revenue **User Provided**

[+ Add Product](#)

- Once Add Products button is clicked an opportunity line form will be opened, where we will pick the product based on hierarchy level (Product Hierarchy -- Reporting Category → Sub Category → Cat class → Product Description → Serialized Unit) on the opportunity.

SummaryProduct Line ItemsQuotesRelated

Price ListpricelevelidDaily Price List

RevenueisrevenuesystemcalculatedUser Provided

+ Add ProductRefreshRun Report

Product Name	Reporting category	Sub Category	Price Per Unit	Quantity	Extended Amount	Discount
Product Description 123	Rep Cat - 1	Sub cat - 1	\$1,000.00	1.00000	\$1,000	---

1.3 Quote Creation

- The next step to select the Quotes Tab, and click on New Quote, a quote will be autogenerated as shown in the screenshot below. This quote will be sent to the customer and wait for their approval.

Summary

Product Line Items

Quotes

1

Field Service

Related

2

+

New Quote

✓

Quote ID

Name

↑

Status

Total Amount

Effective From

Effective To

QUO-01028-G4G1Y6

3

Equipment for Rent

Draft

\$113

- Once the quote is accessed, the next step is to activate the quote and send an email of the quote to customer.

+ New	Delete	Refresh	Collaborate	Look Up Address	Activate Quote	Create PDF	Email as PDF	Get Products	Process	Assign	Share	Email a Link	Flow	...
Require an equipment for Rent										\$1,000	---	---	Draft	...
Quote - Quote										Total Amount	Effective From	Effective To	Status	...
Summary	Details	Related												

- When the quote is confirmed from the customer, then the quote is to be closed as WON or LOST.

+ New	Delete	Refresh	Collaborate	Revise	Close Quote As Lost	Create PDF	Email as PDF	Close Quote As WON	Process	Assign	Share	Email a Link	Flow	...
Read-only This record's status: Active														

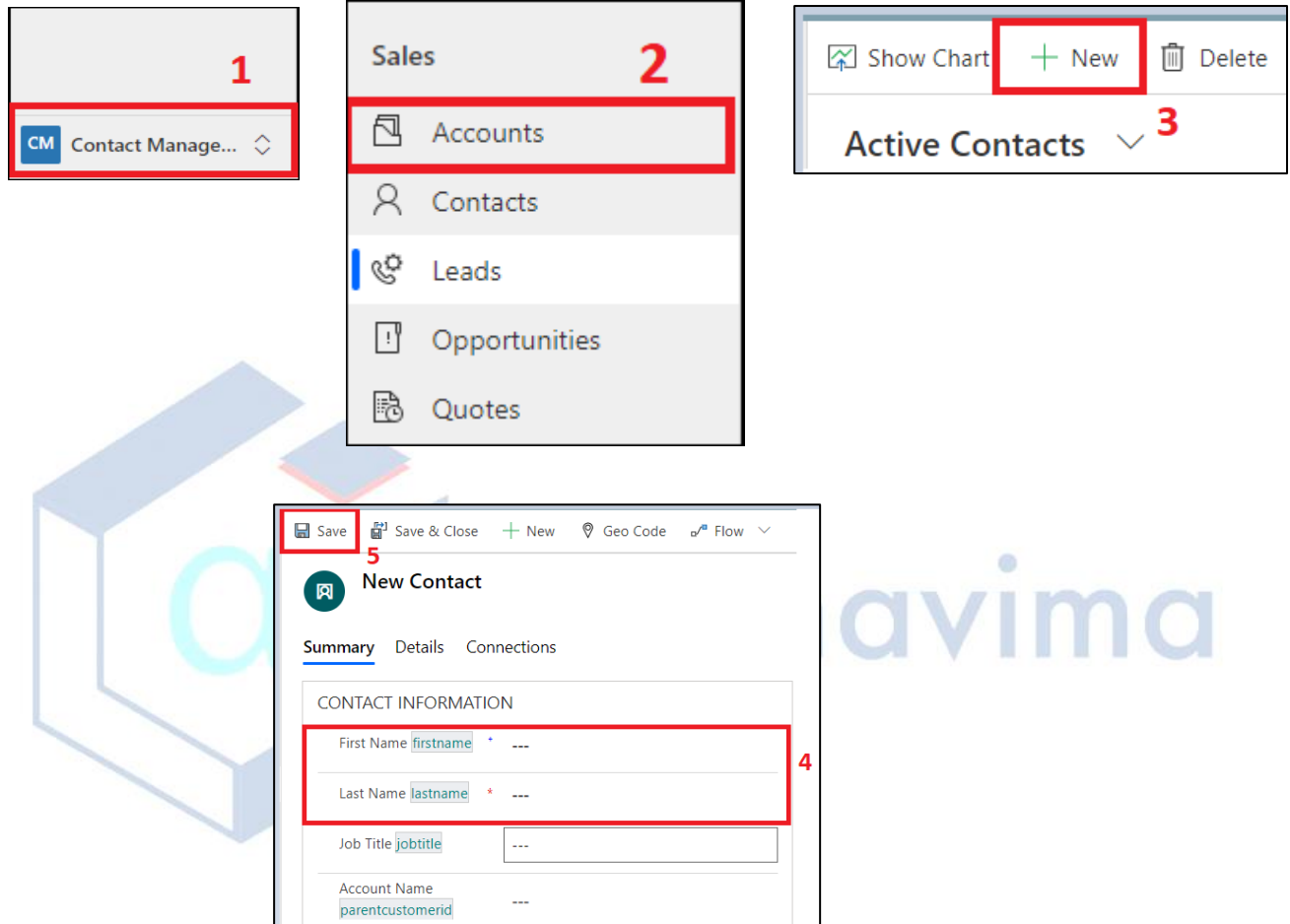
- Once all the above steps are accomplished, can go ahead to create a reservation by clicking on the Convert to Reservation step.

Close as Won	Close as Lost	Recalculate Opportunity	 Convert to Reservation
--------------	---------------	-------------------------	--------------------------------

- Apart from the above approach, we can also create a contact and account individually with out any link to the lead and opportunity business process flow.

1.4 Contact Creation

- One contact is one individual, at the bottom of the left navigation pane, click on the Contact Management area which is the step 1 in the below screen shot → choose Contacts Entity → opens a form then enter the details like first name, last name etc., → save the record.

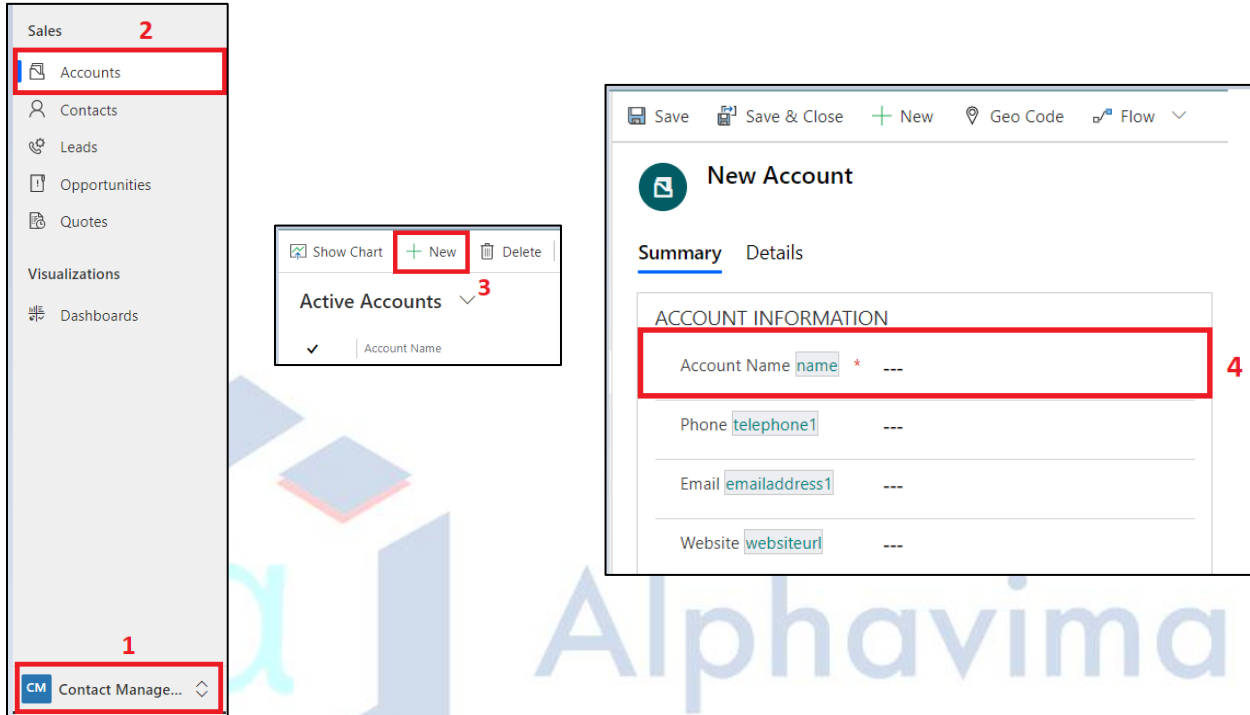


The screenshots illustrate the process of creating a new contact in Alphavima:

- Step 1:** The left navigation pane shows the 'CM Contact Manage...' option highlighted with a red box and the number 1.
- Step 2:** The 'Sales' menu is open, showing options like 'Accounts', 'Contacts', 'Leads', 'Opportunities', and 'Quotes'. The 'Contacts' option is highlighted with a red box and the number 2.
- Step 3:** The 'Active Contacts' view is shown, with the '+ New' button highlighted by a red box and the number 3.
- Step 4:** The 'New Contact' form is displayed. The 'First Name' and 'Last Name' fields are highlighted with a red box and the number 4. The 'Save' button is highlighted with a red box and the number 5.

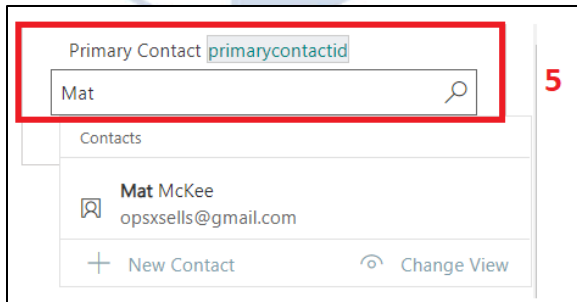
1.5 Account Creation

- One account is one Organization, from the navigation pane select the contact management area and click on the account's entity → new → enter the account name



The image shows two screenshots from the Alphavima application. The left screenshot displays the navigation pane with the 'Sales' section expanded. The 'Accounts' option is highlighted with a red box and labeled with a red '2'. At the bottom of the pane, the 'CM Contact Manage...' option is highlighted with a red box and labeled with a red '1'. The right screenshot shows the 'New Account' form. The 'ACCOUNT INFORMATION' section is highlighted with a red box and labeled with a red '4'. Within this section, the 'Account Name' field is highlighted with a red box and labeled with a red '4'. The 'New' button in the top bar is highlighted with a red box and labeled with a red '3'.

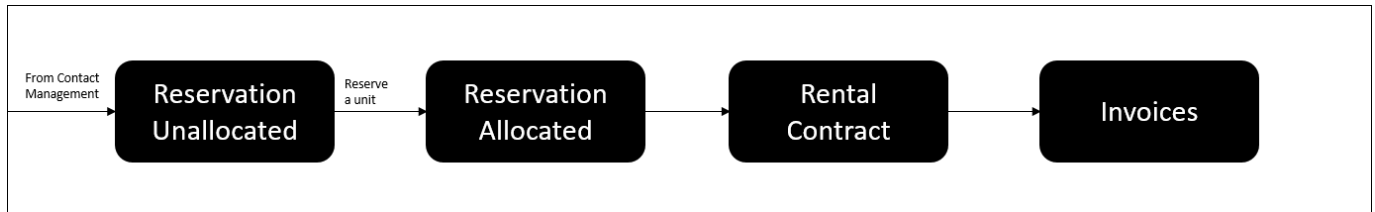
1.6 Associate Contact with Account



The image shows a screenshot of the Alphavima interface. A red box highlights the 'Primary Contact' field, which contains the text 'primarycontactid'. Below this field is a search bar with the text 'Mat' and a magnifying glass icon. To the right of the search bar is a red '5'. Below the search bar is a list of contacts. The first contact is 'Mat McKee' with the email address 'opsxsells@gmail.com'. Below the list are two buttons: '+ New Contact' and 'Change View'.

2. Rental Management

Rental Management flow: Reservation Unallocated → Reservation Allocated → Rental Contract → Invoices

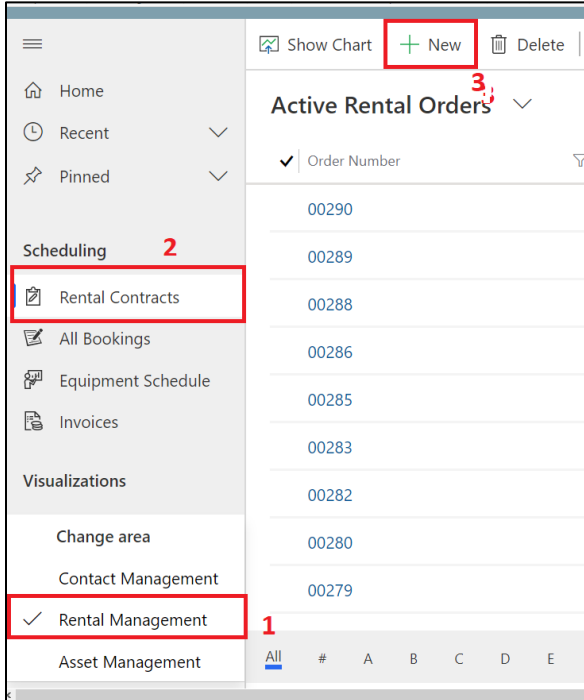


There are two ways of creating a rental contract

1. Manual creation of Rental Contracts
2. Automatic creation from Opportunities, by clicking on the button “Convert to reservation”.

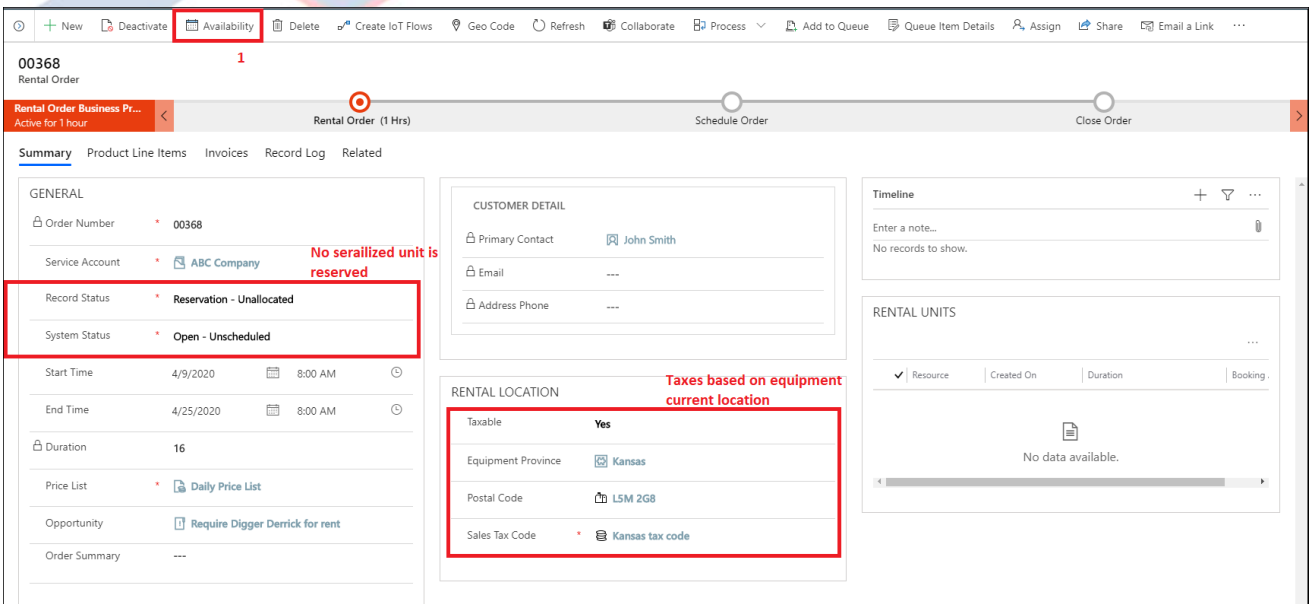
2.1 Manual - Rental Contract Creation

- Manual creation of rental contracts comes into picture when the customer wants the equipment for rent immediately or the customer is a returning customer. In this step we don't have to reserve the equipment rather send the equipment on rent right away.
- If creating a rental contract manually, from the left navigation pane, select the Rental Management area and select the Rental Contracts entity, to create a new contract manually click on the new button and form will open.



Active Rental Orders

Order Number
00290
00289
00288
00286
00285
00283
00282
00280
00279



00368 Rental Order

Rental Order (1 Hrs)

Summary Product Line Items Invoices Record Log Related

GENERAL

Order Number * 00368

Service Account * ABC Company

Record Status * **Reservation - Unallocated**

System Status * **Open - Unscheduled**

Start Time 4/9/2020 8:00 AM

End Time 4/25/2020 8:00 AM

Duration 16

Price List * Daily Price List

Opportunity Require Digger Derrick for rent

Order Summary ---

CUSTOMER DETAIL

Primary Contact John Smith

Email ---

Address Phone ---

RENTAL LOCATION

Taxable Yes

Equipment Province Kansas

Postal Code L5M 2G8

Sales Tax Code * Kansas tax code

Timeline

Enter a note...

No records to show.

RENTAL UNITS

Resource Created On Duration Booking

No data available.

In manual creation, enter the record status as Reservation Unallocated because no serialized unit is reserved yet.

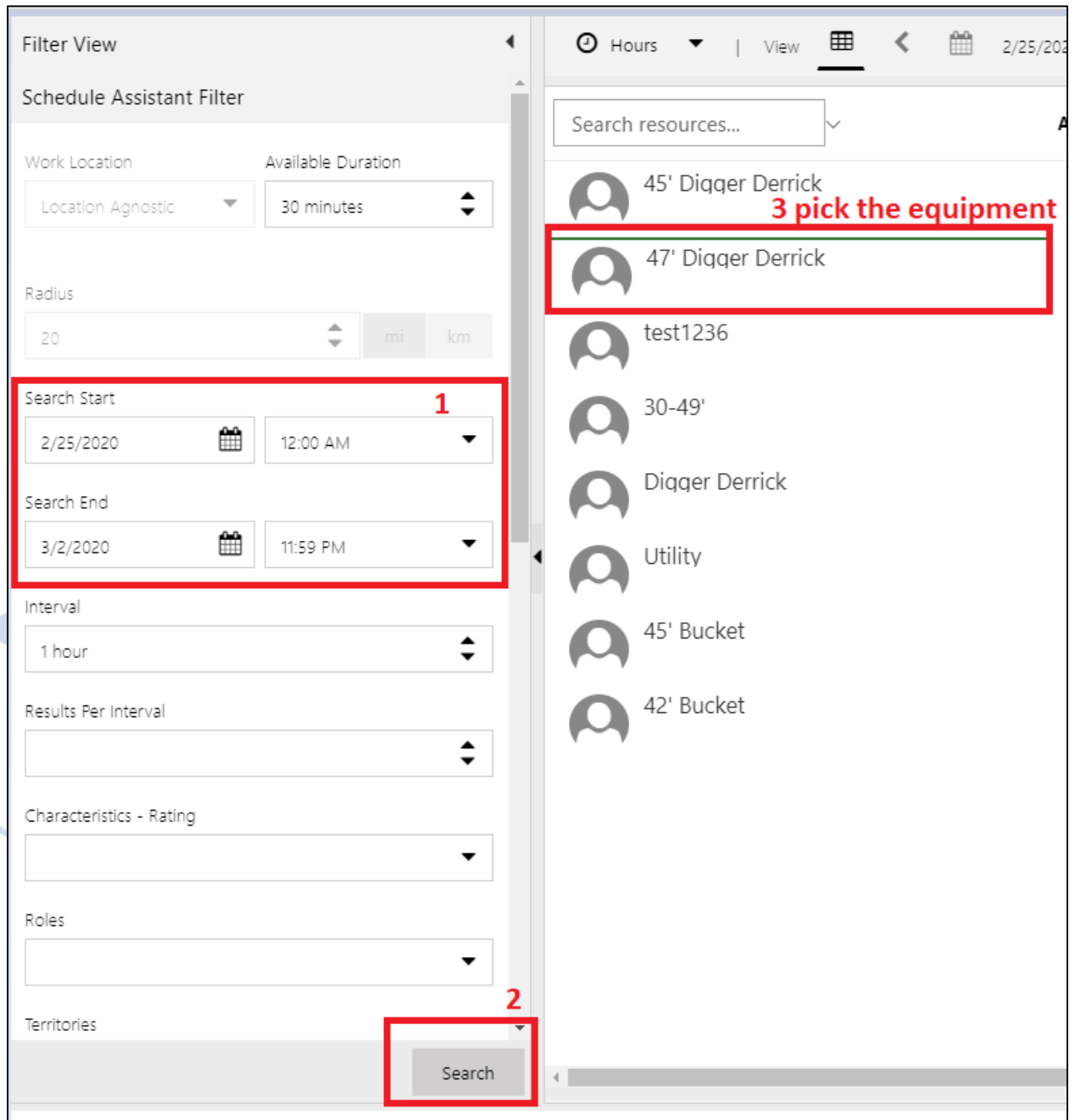
- On the system status field that's highlighted on the rental contract corresponds to the bookings.
- If the status is
 - Open-Unscheduled → No bookings made, reservation is made, and quote is generated on the opportunity level
 - Open-Scheduled → When booking record is created and booking status on the booking's entity (Bookable Resource Bookings) is **Reserved**.



3. Open-In progress → When the booking status on the Booking's entity (BRB) is ***On Rent***
 4. Open-Completed → Booking Status is ***Completed***
 5. Closed-Posted → An officer will check all the details and change the status to ***closed posted***
 6. Closed-Canceled → Booking status is ***Cancelled***
- The next step is to pick a serialized unit and reserve it, by clicking on the button "Availability" from the above screenshot.
 - Once Availability button is clicked, this leads to a Schedule Board. On the Schedule Board, enter the start date and end date and click on search button, on the right can view the list of available resources.



Alphavima



- Once the serialized unit is selected, on the right there will be a popup as shown in the below screenshot. Enter the details like start date and end date which should match the rental contract start date and end date. Enter the booking status,
 - On rent → Equipment has gone for rent
 - Reserved → Equipment has been booked
 - Completed → Equipment has accomplished the rental contract
 - Cancelled → Equipment has been cancelled/returned

- Click on Book will stay on same screen and make another booking against the same rental contract.
- Click on Book and Exit will exit the schedule board.

Create Resource Booking - 00361

Resource

[Test 12](#)

Start

4/9/2020

6:45 PM

Estimated Arrival Time

4/9/2020

6:45 PM

End

4/9/2020

7:15 PM

Booking Status

Reserved

On Rent

Completed

Travel Time

0 minutes

Book

Book & Exit

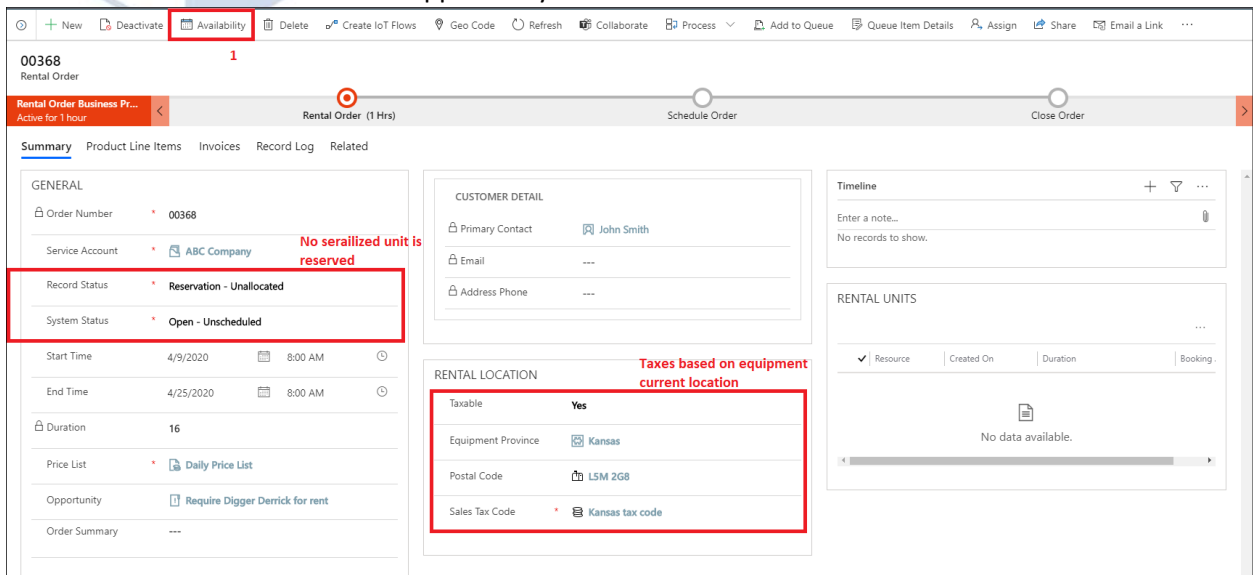
- Once the schedule board is closed, under rental units on the rental contract a new record will be created, holding the information about the start date and end date of the bookings, and the booking status.

RENTAL UNITS			
✓ Resource	Created On	Duration	Booking .
45' Digger Derri	4/1/2020 10:11...	3 days	On Rent

If there are any changes to the bookings, the booking status can be edited by entering into the record as shown above.

2.2 Automatic Creation of Rental Contract

- When we complete the lead – opportunity lifecycle, and if the customer wants the equipment for a future date we create a reservation allocation step and wait to convert to a rental contract as the date arrives.
- If creating the rental contract from the opportunity (From convert to Reservation button on opportunity), all the details will be auto populated from the opportunity. A record will be created from the opportunity level.

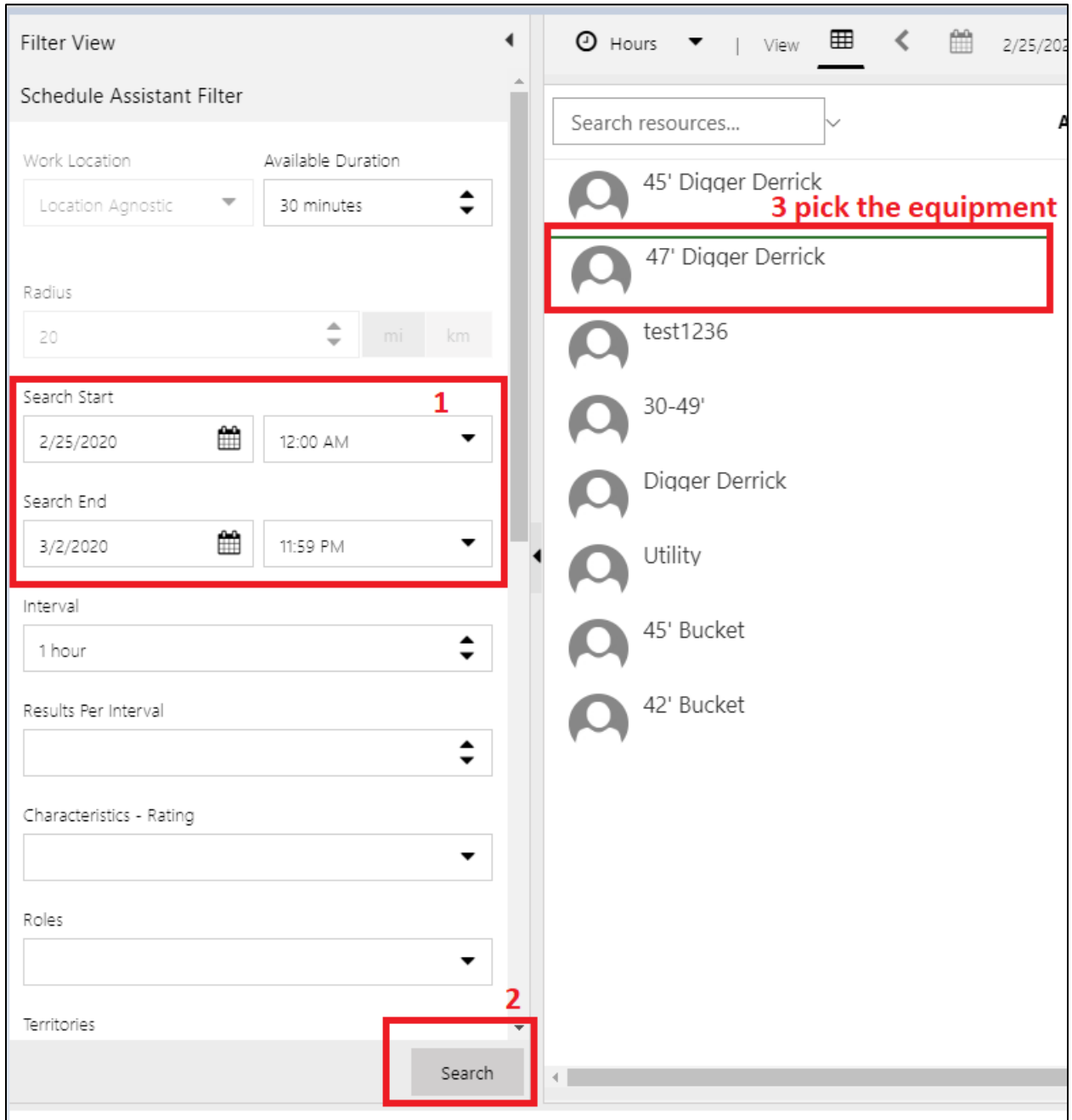


- On the system status field that's highlighted on the rental contract corresponds to the bookings.

- If the status is
 7. Open-Unscheduled → No bookings made, reservation is made, and quote is generated on the opportunity level
 8. Open-Scheduled → When booking record is created and booking status on the booking's entity (Bookable Resource Bookings) is **Reserved**.
 9. Open-In progress → When the booking status on the Booking's entity (BRB) is **On Rent**
 10. Open-Completed → Booking Status is **Completed**
 11. Closed-Posted → An officer will check all the details and change the status to **closed posted**
 12. Closed-Canceled → Booking status is **Cancelled**
- Initially there are no records, under the reservations in order to make one, click on the “availability” button on the rental contract form.
- This leads to a Schedule Board. On the Schedule Board, enter the start date and end date and click on search button, on the right can view the list of available resources.



Alphavima



Filter View

Schedule Assistant Filter

Work Location: Location Agnostic

Available Duration: 30 minutes

Radius: 20 mi km

1 Search Start: 2/25/2020 12:00 AM

Search End: 3/2/2020 11:59 PM

Interval: 1 hour

Results Per Interval:

Characteristics - Rating:

Roles:

2 Territories:

3 pick the equipment

Search resources...

- 45' Digger Derrick
- 47' Digger Derrick**
- test1236
- 30-49'
- Digger Derrick
- Utility
- 45' Bucket
- 42' Bucket

Search

- Once the serialized unit is selected, on the right there will be a popup as shown in the below screenshot. Enter the details like start date and end date which should match the rental contract start date and end date. Enter the booking status,
 - On rent → Equipment has gone for rent
 - Reserved → Equipment has been booked
 - Completed → Equipment has accomplished the rental contract
 - Cancelled → Equipment has been cancelled/returned
- Click on Book will stay on same screen and make another booking against the same rental contract.



- Click on Book and Exit will exit the schedule board.



Alphavima

Create Resource Booking - 00319

Resource

[47' Digger Derrick](#)

Start

4

2/25/2020

10:47 AM

Estimated Arrival Time

2/25/2020

10:47 AM

End

5

2/25/2020

11:17 AM

Booking Status

6

Reserved

Distance

0.00 miles

Travel Time

0 minutes

7

Book

Book & Exit

vima

- Once the schedule board is closed, under rental units on the rental contract a new record will be created, holding the information about the start date and end date of the bookings, and the booking status.

RENTAL UNITS				
...				
✓	Resource	Created On	Duration	Booking .
	45' Digger Derri	4/1/2020 10:11...	3 days	On Rent

- Once a booking is made the record status should be changed to reservation allocated, which means a serialized unit is reserved or allocated as shown in the screenshot below.

GENERAL

Order Number

*

00344

Service Account

*

Account_03_03

Record Status

*

Reservation - Allocated

System Status

*

Open - Scheduled

- When the calendar date arrives, we must convert this reservation allocated to rental contract but clicking on the button “Convert to Rental Contract”

New

Deactivate

Availability

Delete

Create IoT Flows

Geo Code

Refresh

Collaborate

Convert to Rental Con...

Process

Add to Queue

Queue Item Details

Assign

...

- Automatically the Record Status will be changed to “Rental Contract”

GENERAL

Order Number * 00344

Service Account * Account_03_03

Record Status * Rental Contract

System Status * Open - In Progress

- For a quick view of list of invoices, can view under Invoices tab on the rental contract.

Summary Products Record Log Invoices Related						
Search for records						
✓ Name	Status Reason	Total Amount	Customer	Email Address	Created On	
00318	New	\$113	Tech Data	---	2/20/2020 12:52 AM	
00318	New	\$113	Tech Data	---	2/20/2020 1:52 AM	

- The current solution can auto generate the invoices, for now they are generated for every 28 days from the start date.
- For every generation of invoice, a copy of email is sent to the customer by clicking on the button . Based on the customer response, the invoice can be confirmed or canceled.

New Delete Refresh Collaborate RE Look Up Address Confirm Invoice Invoice Paid Cancel Invoice Recalculate Lock Pricing Create PDF Email as PDF Process ...

- A copy of invoice contains all the details from the rental contract. Under the Product details sub grid, can view the list of products associated to this rental contract.

PRODUCT DETAILS
Refresh ...

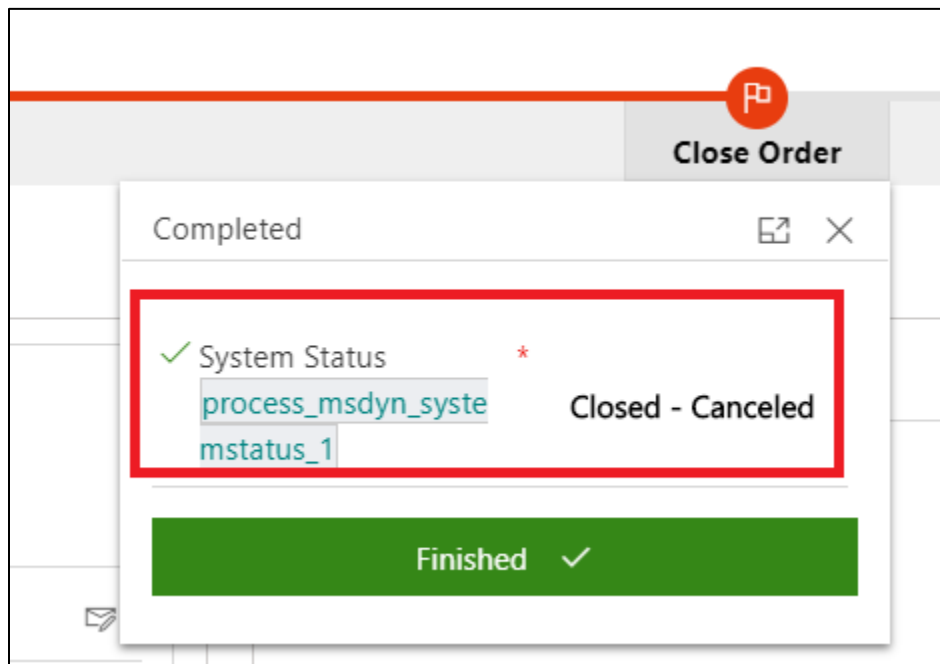
Group By: (no grouping)

✓ Product...	Prop...	Price P...	Quant...	Disc...	Extended A...	
> 45' Digge...	No...	\$100.00	1.00000	---	\$113	

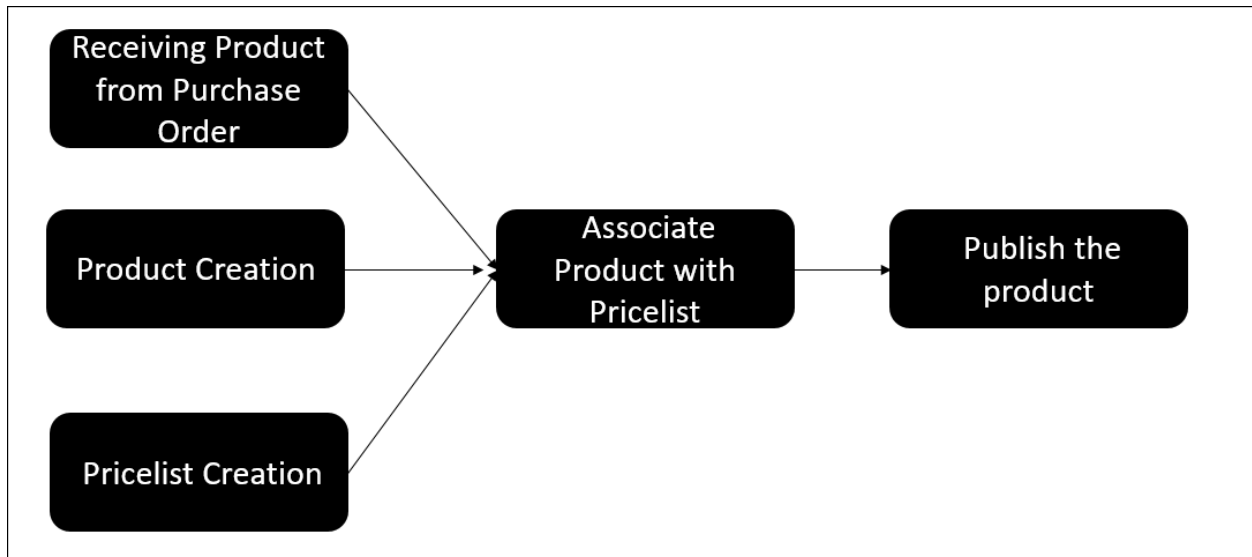
Page 1

2.3 Closing the Rental Contract

- Once the equipment has been returned then the system status can be changed to the closed Completed, as well as on the Business Process Flow the status also can be changed accordingly.
- When all the bookings associated to the rental contract are cancelled then the status of the rental contract would be closed cancelled.
- If all the bookings are completed, then the status of the rental contract will be open completed.



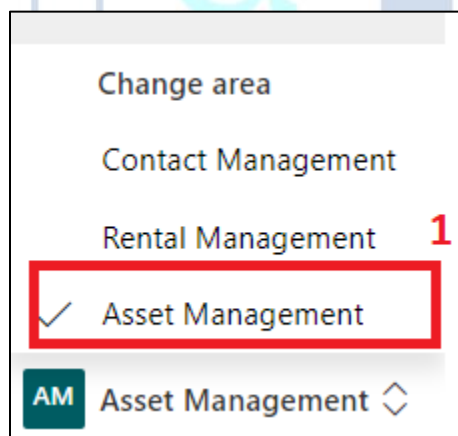
3. Asset Management

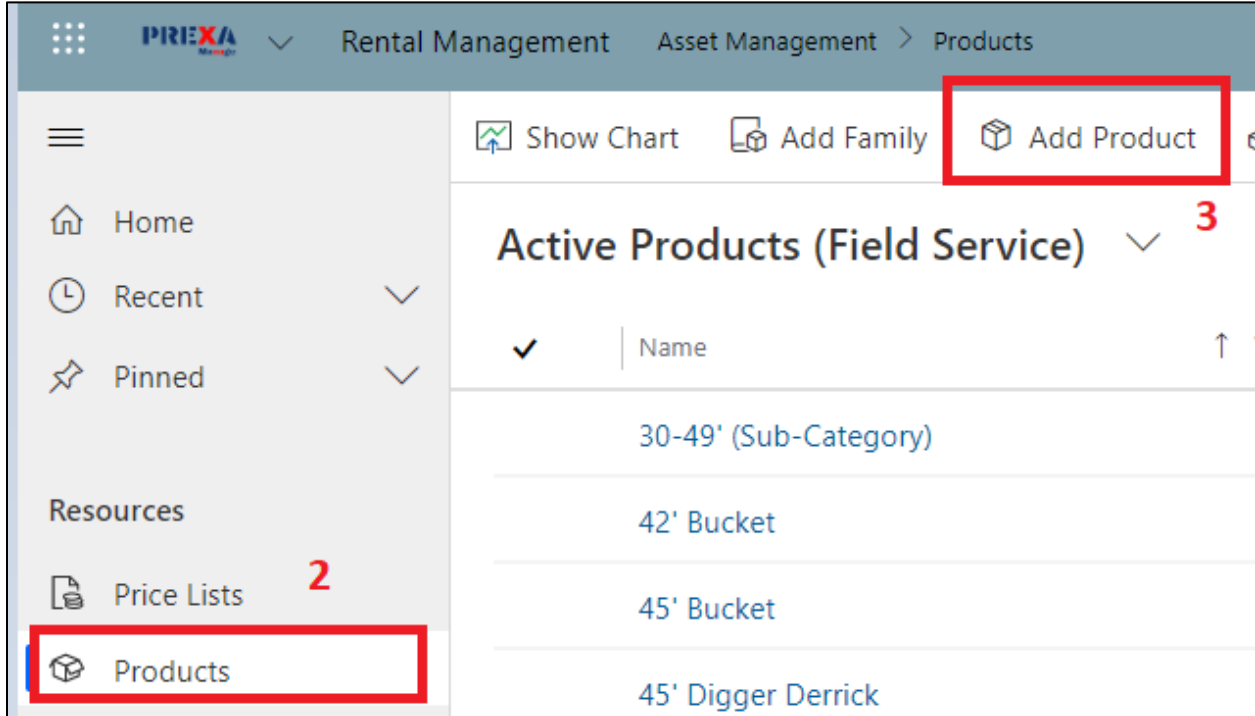


This module contains all the functionalities associated to receiving the products from Purchase Order and inventory management and creation of products and associating a product with price list.

3.1 Product Creation

- First step is to access the Asset Management area, click on the products entity and from the header on select the **Add Product**, and this will lead to a form.





PREXA Manager Rental Management Asset Management > Products

Home Recent Pinned

Resources

Price Lists 2

Products

Show Chart Add Family Add Product

Active Products (Field Service) 3

30-49' (Sub-Category)

42' Bucket

45' Bucket

45' Digger Derrick

- On the form, enter the details like the product name, Product ID etc., if the product is a serialized unit enter its associated hierarchy levels like the Reporting Category, Subcategory, Cat Class and Product description. By default, the product will be in a draft state, once done will have to publish the product in order to use it against any reservation or rental contract.

1 Product: 11' Digger Derrick -- VFDRTE23456258

Active Status PRD-0498 Product ID

PRODUCT DETAILS Related

Reporting category	Test_RC_25_02
Sub Category	Test_SC_25_02
Cat Class	Cat Class 1
Is serialized unit?	Yes
Name	11' Digger Derrick -- VFDRTE23456258
Product ID	PRD-0498
Valid From	4/7/2020
Valid To	4/17/2020
Description	---





Serialized Unit Details

Product Description	10' - 20' Digger Derrick
Serialized Unit Name	11' Digger Derrick

Pricing Information

Default Unit	Primary Unit
Default Price List	Monthly Price List
Taxable	Yes

- Every product must be associated with a default unit, and price list alongside all the Serialized unit details should be entered as well.
 1. The life span of the product will be decided based on the Original Equipment Cost and the reporting category
 2. For the depreciation, this solution follows straight line depreciation calculated based on the Purchase Price, scrap value and the life span.

Default Unit	*	 Primary Unit
<input type="text" value="defaultuomid"/>		
Default Price List		 Monthly Price List
<input type="text" value="pricelevelid"/>		
Taxable	*	Yes
<input type="text" value="msdyn_taxable"/>		
Original Equipment Cost		\$5,000
<input type="text" value="new_originalequipme"/> <input type="text" value="ntcost"/>		
 life-span		8
<input type="text" value="new_lifespan"/>		
Scrap		\$800
<input type="text" value="new_scrap"/>		
Purchase Price		\$209,500
<input type="text" value="new_purchaseprice"/>		
 Depreciation per month		\$26,088
<input type="text" value="new_depreciationper"/> <input type="text" value="year"/>		


- Once the price list is associated, then select the price list, under general tab can view the currency the products are billed. Under the Price list items tab from the screenshots below select the new Price list item.


Monthly Price List


Price List



1 General **2** Price List Items Related

Name * **Monthly Price List**

Start Date --- 

End Date --- 

 Currency * **USD**

+ New Price List Item	 Refresh	 Run Report	...
Amount			
			\$125.00

- Once the new Price list item is selected, enter the Product details like the product, unit and the pricing information.

New Price List Item

Price List Item · Information ▾

General

Price List *  Monthly Price List

Product *  47' Digger Derrick

1


Unit *  Primary Unit X

Pricing

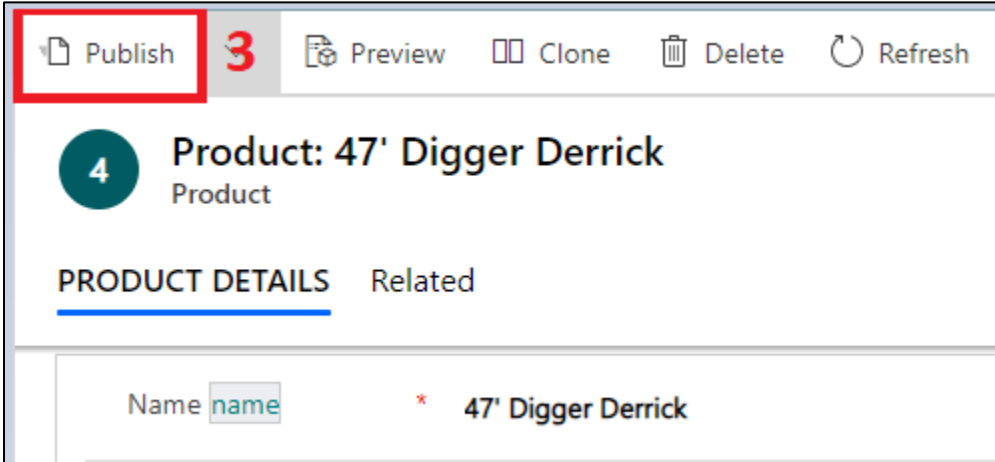
Pricing Method * Currency Amount

Amount * \$1,258.00

2

 Percentage

- Once the pricing information is provided, get back to the product and will have to activate the product. Clicking on Publish will activate the product and the product would be ready to be added into the rental contract.

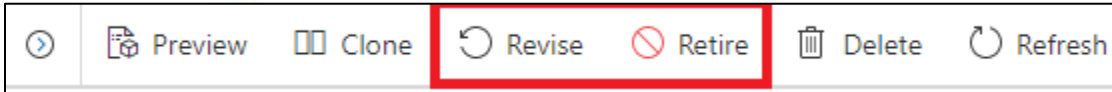









4 Product: 47' Digger Derrick
Product

PRODUCT DETAILS Related

Name * 47' Digger Derrick

- After the product is created, on the header of the product options like Revise and Retire will also be shown, to change the status of the product as per requirements.



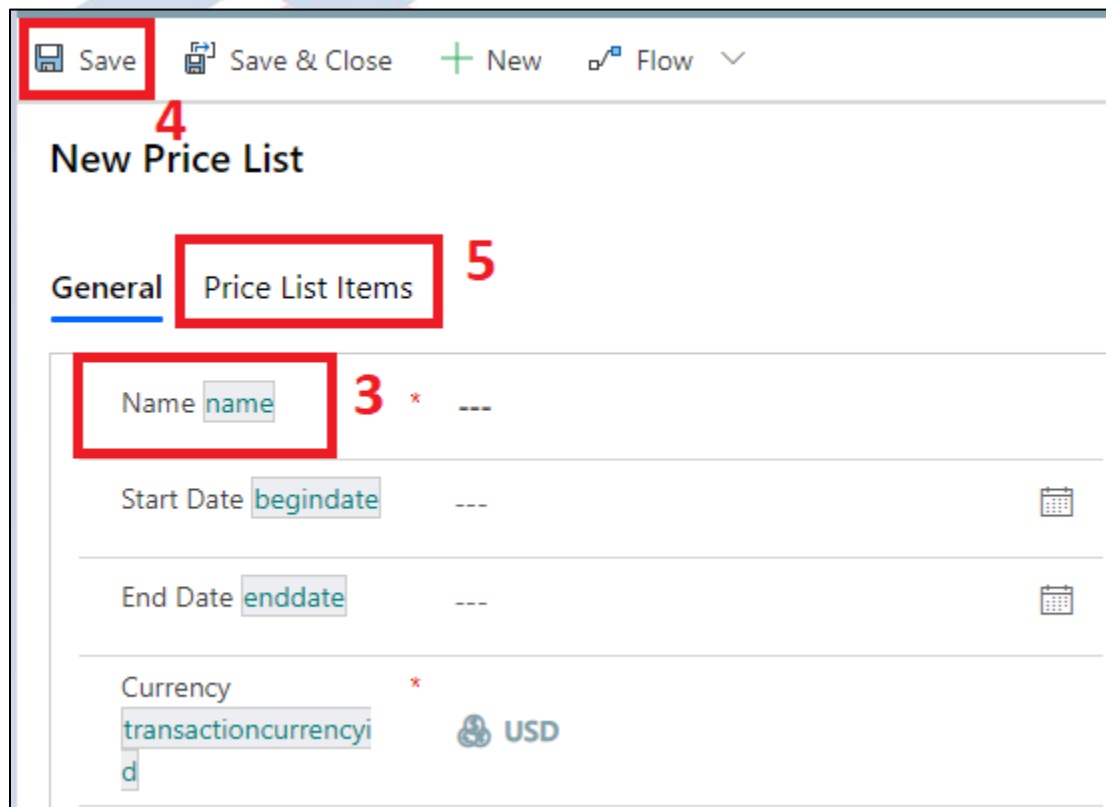
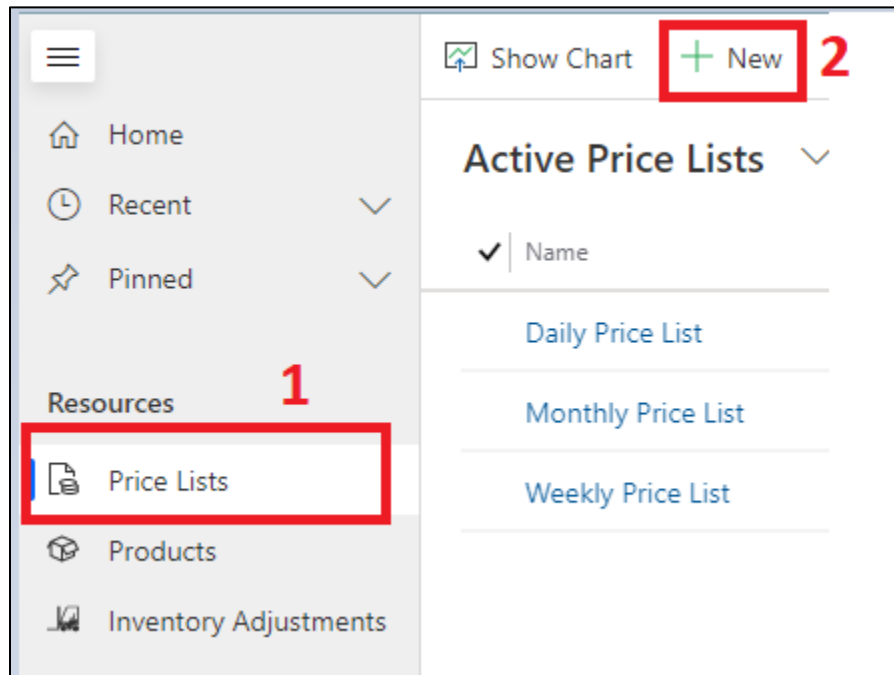
  Preview  Clone  Revise  Retire  Delete  Refresh

From the above screenshot,

1. Revise → will change the status to under revision and can't be used in the rental contract in this stage.
2. Retire → The product will no longer be active and can't be used in the rental contract.

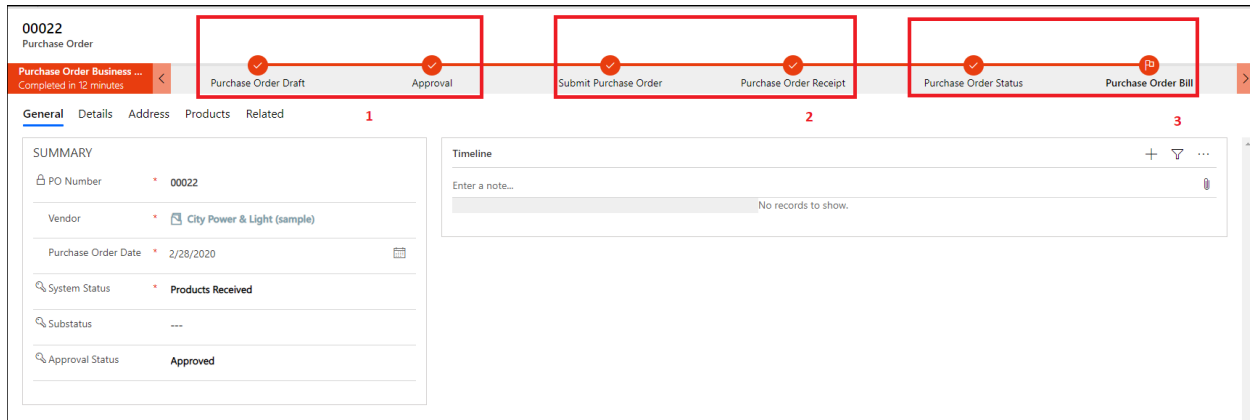
3.2 Price List Creation

- Price list mainly holds the pricing information associated with each product.

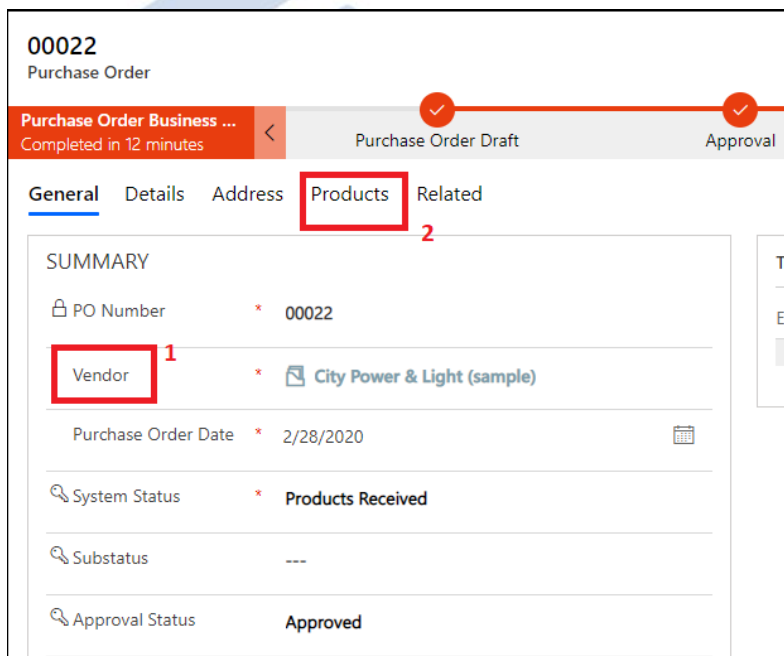


3.3 Purchase Order

Purchase Order life cycle follows a Business Process Flow as shown below.



The first two stages are the Product Requisition stage, whereas when a product is requested, and a privileged person would approve the request.



Enter the Vendor account from whom we are purchasing the product/equipment. In the Products tab enter the product description while requesting the products along with its quantity.

5'-7' Product Description_25_01	---	5.00	---	Pending	2	4/9/2020 6:24 PM
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From the above screenshot, a request has been made for the product with a quantity of 5 and its in the pending status because its not received yet. While receiving the products that we have requested a record under the receipt products tab should be created.

POR - 00022
Purchase Order Receipt

Completed in 12 minutes

Purchase Order Business < Purchase Order Draft Approval Submit Purchase Order **Purchase Order Receipt** Purchase Order Status Purchase Order Bill >

General **Receipt Products** Notes Related

Name * POR - 00022 Owner

Purchase Order * 00022 Ship Via

Received By Latha Duddugala Date Received

Note ---

Completed

✓ Received By Latha Duddu...

✓ Date Received * 2/28/2020

Ship Via ---

If receiving all the 5 products then, 5 product records will be auto created as shown in the screenshot below and will have to enter the serialized units' details by opening each record and this will be auto updated in the inventory.

General **Receipt Products** Notes Related

✓ Purchase Order (Purchase Order Product)	Product (Purchase Order Pro...	Associate ...	Quantity	Vendor (Purchase O...	Date Received (Purchase Order Receipt)	Bill Date (Purchase Order Bill)	Created On
00026	5-T' Product Description 25.01. Main		5.00	Cherokee Co Elec Coop...	4/9/2020	---	4/9/2020 6:33 P...

Associated Products

+ New Product Add Existing Product Refresh ...

Search for records

✓ Name	Product ID	Field Service Product Type	Status Reason	Reporting category	Sub Category
Please enter the details	PRD-0953	Inventory	Draft	---	---
Please enter the details	PRD-0943	Inventory	Draft	---	---
Please enter the details	PRD-0945	Inventory	Draft	---	---
Please enter the details	PRD-0947	Inventory	Draft	---	---
Please enter the details	PRD-0949	Inventory	Draft	---	---

The last two stages of the BPF are the details of the associated with the payments for received products, where we can hold the invoice number that's related to this purchase from the vendor.