



RentalLife

Installation and Setup Guide - English

Marcel Schmidt

CRM Partners AG

Helfmann-Park 7 65760

Eschborn

6-7-2020

Content

1.	Introduction	3
2.	Additional Languages	4
3.	Solution Import	6
3.1	Import of the solutions	6
3.2	Switch language (for logged in user)	11
4.	Configurations	12
4.1	Booking Status	12
4.2	RentalLife Settings	13
5.	Security	15
5.1	Security Roles	15
5.1.1	RLFS–Administrator	15
5.1.2	RLFS–Sales Person	15
5.1.3	RLFS–Service Engineer	15
5.2	Assign security roles to users	15
5.3	Assign Security Profile	17
6.	Templates	19
6.1	Template Types	19
6.2	Add templates to CRM	19

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

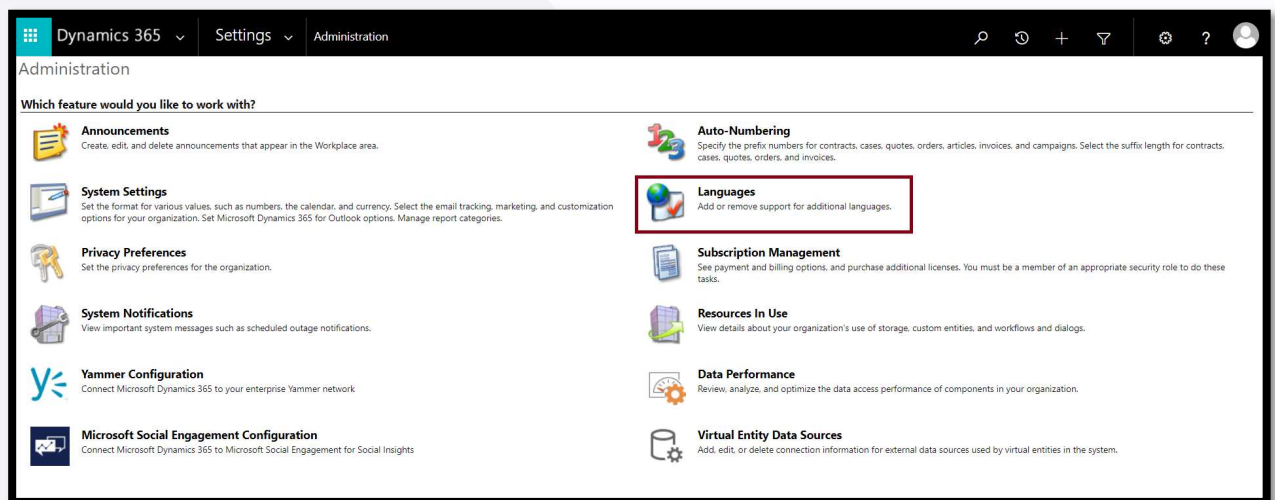
- Prerequisites configuration (Language)
- Steps to import solutions into CRM instance (Dynamics 365)
- Field Service (8.8.1.45)
- Security roles and their privileges

2. Additional Languages

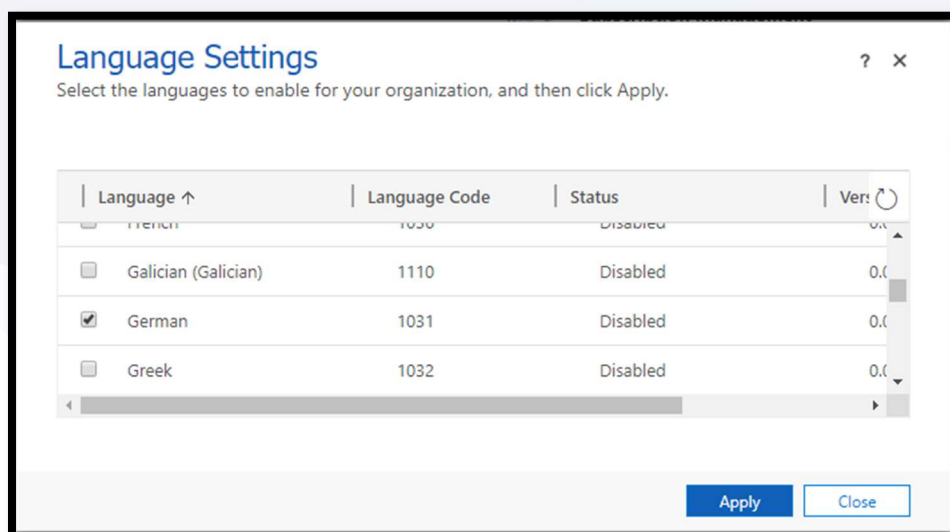
RentalLife is supported in English and German language. English is base language, and solution will be in English by default. If organization wants to be able to use Rental Life it in German, German languages need to be installed before importing solution.

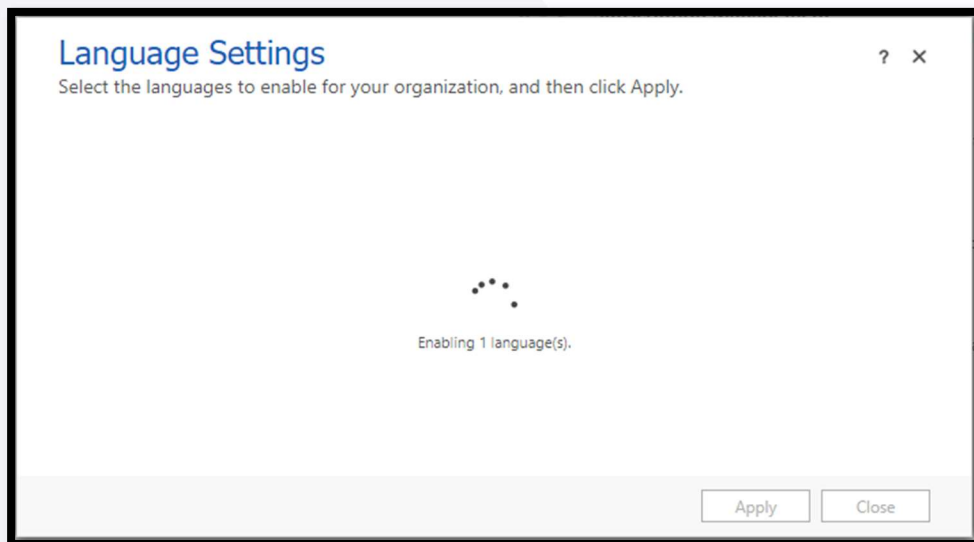
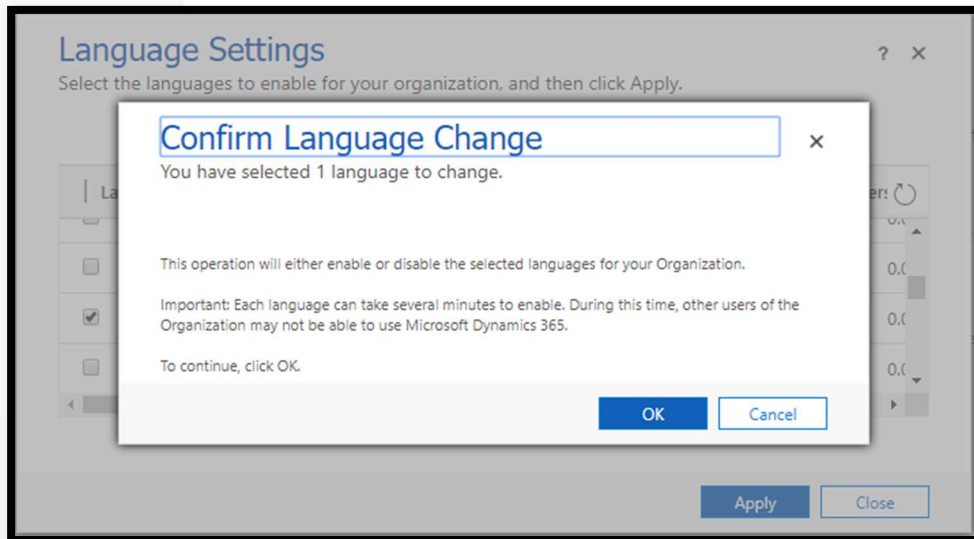
Check if desired language is already installed:

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. Solution Import

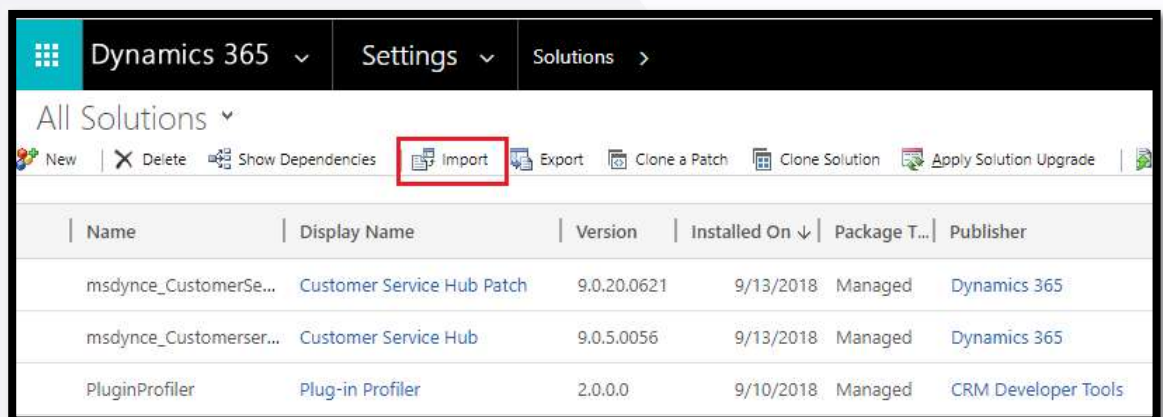
After receiving solutions (e.g. as a trial version) from CRM Partners, two solutions need to be installed (in following order):

1. Licensing Solution
2. Rental Life Solution

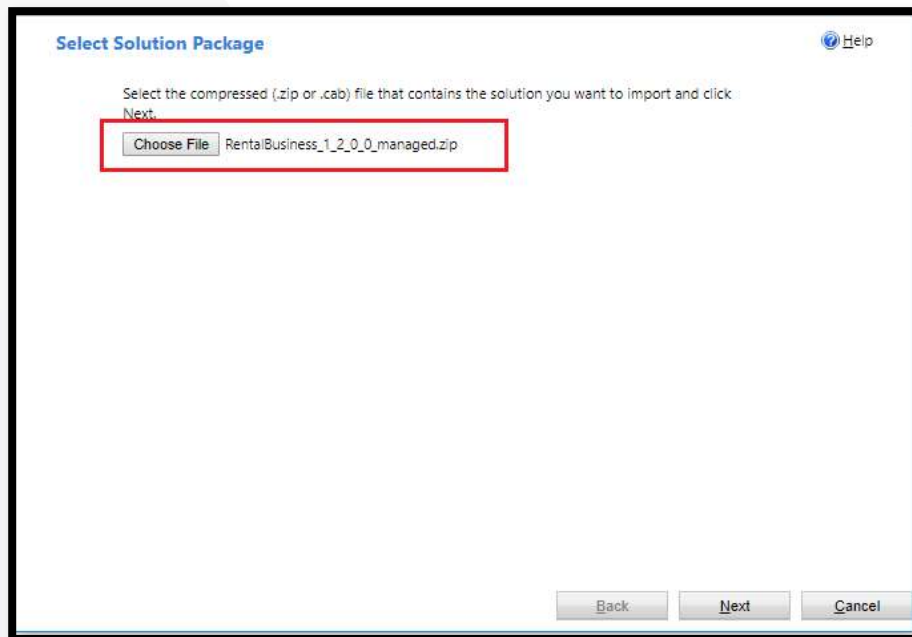
3.1 Import of the solutions

Following steps are valid for importing Licensing solution and Rental Life solution.

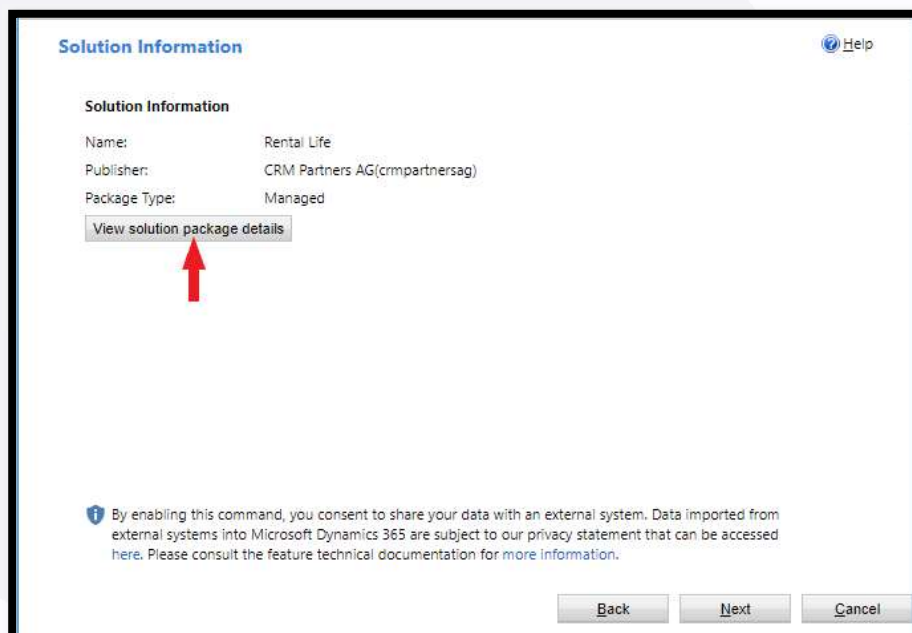
1. Go to the Solutions page and click the Import button. Please note that the language must first be set in the base language. For example: if your system base language is English, it must be set as in the screenshots below.



2. Select Licensing (first) / Rental Life (second) .zip solution file provided by CRM Partners and click Next



3. Next screen will show some solution information. Click on View solution package details for more info:



4. View solution package details button will open following screen (click Close to go back):

Rental Life

▼ Solution Details

Display Name: Rental Life Name: RentalBusiness
Version: 1.2.0.0 Package Type: Managed
Description: 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

▲ Publisher Details

Display Name: CRM Partners AG Name: crmpartnersag
Description:
Phone: +31 (0) 342 42 70 90 Email: info@crmpartners.nl
Support Website: https://crmpartners.nl
Street 1: Baron van Nagelstraat 136 ZIP/Postal Code:
Street 2: 3771 LL Country/Region: Netherlands
City: Barneveld
State/Province:

Solution Components

Display Name ↑	Original Display Name	Type	Descripti
AssetAvailabilityForQuote	AssetAvailabilityForQuote	Process	
Assets	Assets	Entity	
Contact		Entity	Person with
Cost	Cost	Entity	
Cost - Name	Cost - Name	Process	

Page 1

Close

5. On the next screen, option Enable any SDK message processing steps included in the solution is enabled by default, so nothing needs to be changed. Click Import.

Import Options Help

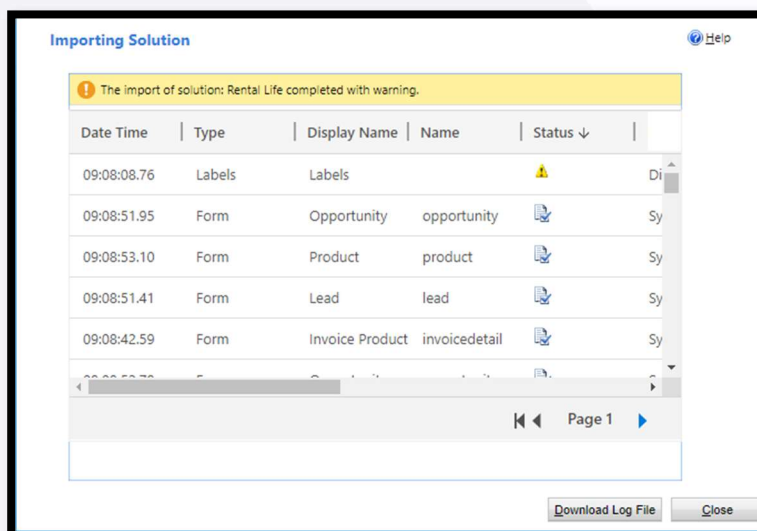
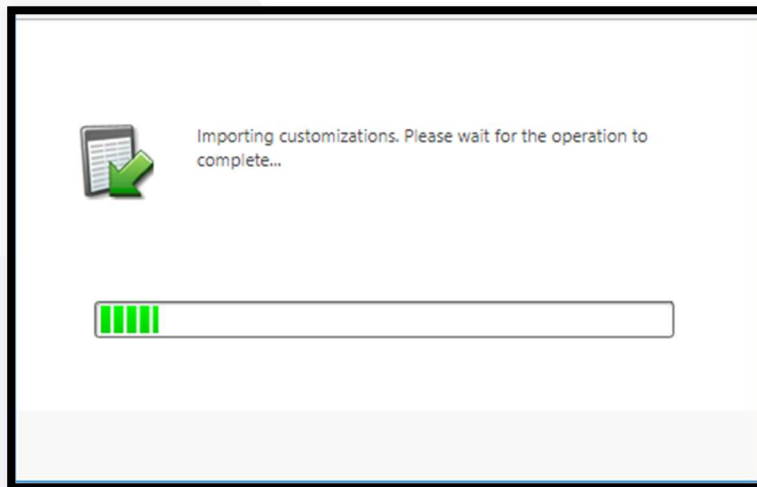
Post Import Actions

☒ Enable any SDK message processing steps included in the solution

NOTE: New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.

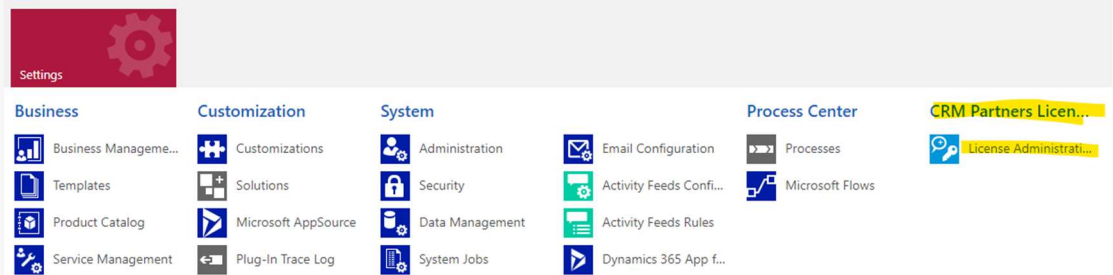
Back Import Cancel

6. Import process starts and when done, message about successful import appears.
Note: Message might say that import was successful, but with warnings. This will happen if German language is not installed on the instance.



7. Download Log File button will provide more information about import and imported components.

8. After installing solution, trial can be triggered by going to Settings area, and then to CRM Partners Licensing:



9. Register for new license (if new prospect/customer, use New Customer)
10. Fill out the form and click register

License Dashboard

[Register customer](#)

Company

Name

E-mail address

☒ This is a production instance [Why is this important?](#)

☐ 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.

[Learn how we collect data for licensing and support purposes.](#)

[Register](#)

Installed solutions

Solution	Status
Rental Life	No License

11. Click on Request Licenses

Available licenses

Installed solutions

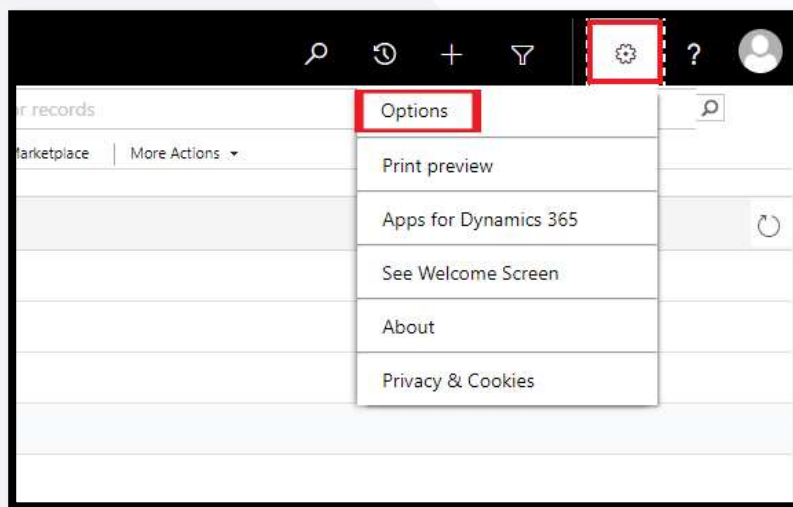
Solution	Status	Action
Rental Life	No License	Request Licenses

Data will be updated, and licensing will be displayed with remaining number of days:

Installed solutions		
Rental Life	✓	Trial License: 30 day(s) remaining

3.2 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

Set Personal Options
Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select the language you prefer to see Microsoft Dynamics 365 displayed in
You can change the display language used for items such as menus and dialog boxes.

Base Language: English

User Interface Language: German ▼

Help Language: German ▼

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

4. Configurations

Post solution import, we have to add few records that will be used by app to work

4.1 Booking Status

Base data needs to be created manually to have additional booking status values.

Open Rental Life App, and go to Booking Statuses, and add following values.

Name	Status	Fields Service Status	Status Color
Delivery	Committed	Scheduled	FF8769
Return	Committed	Scheduled	FFAB03

Example of Booking Status:

Delivery
Booking Status

General Common Field Service Related

Name * Delivery

Status * Committed

Description ---

No record

Delivery

Booking Status

General **Common** Field Service Related

Status Color

FF8769

4.2 RentalLife Settings

Navigate to RentalLife app and open settings. Update the settings as per organization need. For each business unit new record needs to be added into the system.

Time Calculation

Adding the additional bookable resource bookings to Schedule board for moving assets from Warehouse to Customer place (Delivery) and back from customer place to warehouse (Return)

Invoice Processing

Available options are

- All in one go
Each invoice needs to be created manually
- Event Driven
On order vide, the custom button added "Create Invoices for all Orders" that will generate invoice in bulk for all eligible orders

Work Days

This will define the organization working days to calculate the duration (days the asset was use between date from and date to)

Holiday

This will define the holiday as public holiday when the asset will not be calculated as rental day

Early Retune

Available options are

- Take only the used days, but with the original fee
Accept the early return and recalculate the invoice for revised rental period but use the same "cost per day"
- Take only the used days, but with the higher rate (recalculate the fee according the rate table)
Accept the early return and recalculate the invoice for revised rental period but use the revised "cost per day"
- Ignore the early return, just invoice the original amount
Accept the early return but keep the same invoice. (No modification into Quote/Order/Invoice)

5. Security

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

5.1 Security Roles

5.1.1 RLFS–Administrator

User with “RLFS–Administrator” security role will be able to create/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 be the system administrator for “Rental Life”

5.1.2 RLFS–Sales Person

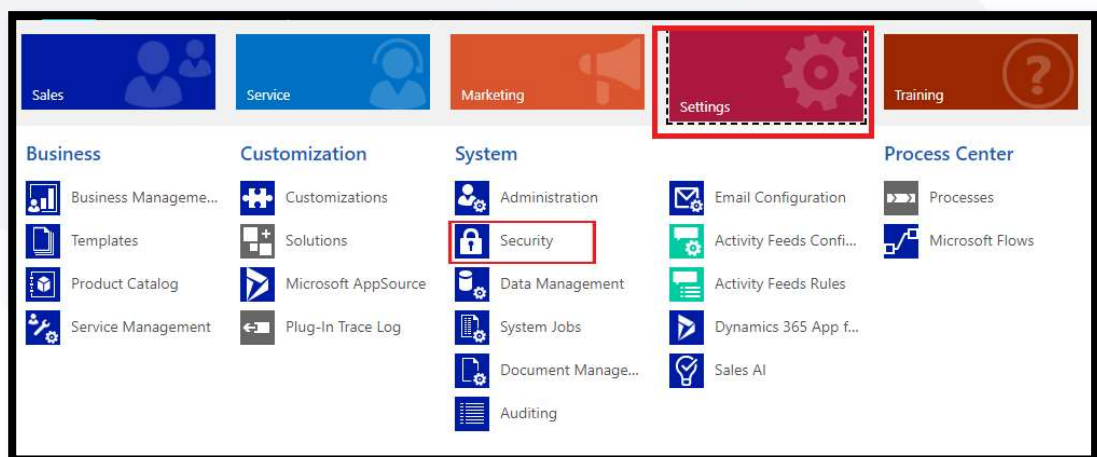
User with “RLFS–Sales Person” security role will be able to read the all the master (Subject, Products, Cost/Offerings, Deprecation, Price List) and create/update all daily records (Lead, Opportunity, Quote, Order, Invoice) and create maintenance task (Repair) into system.

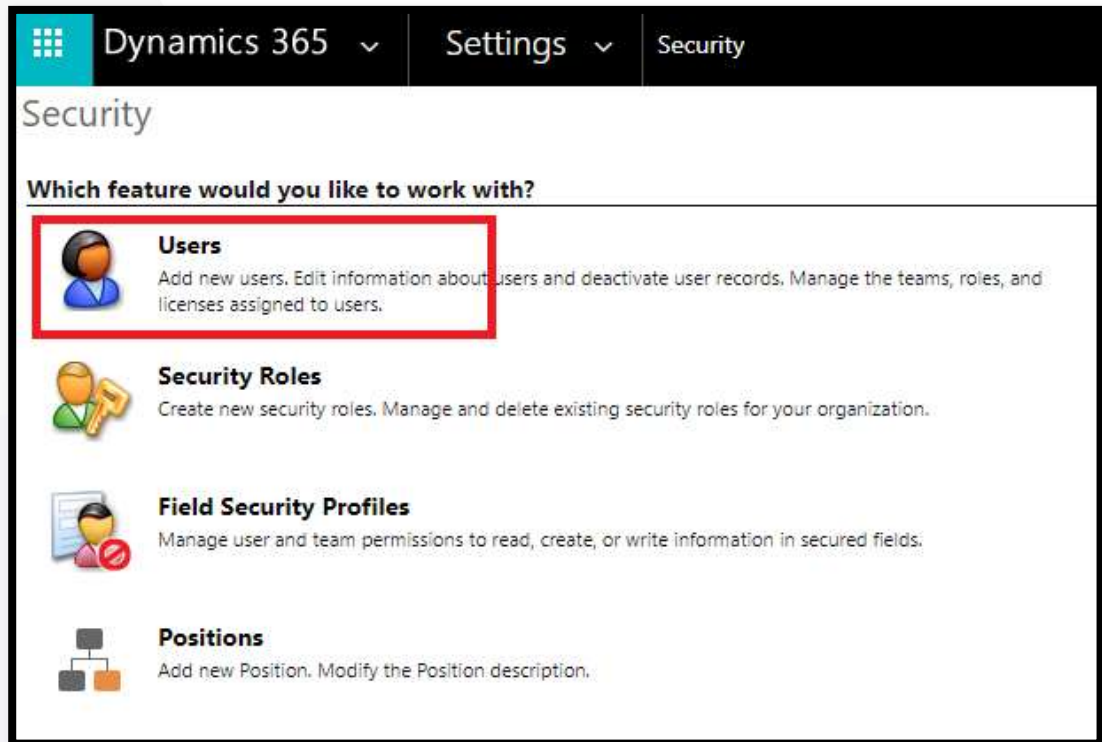
5.1.3 RLFS–Service Engineer

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

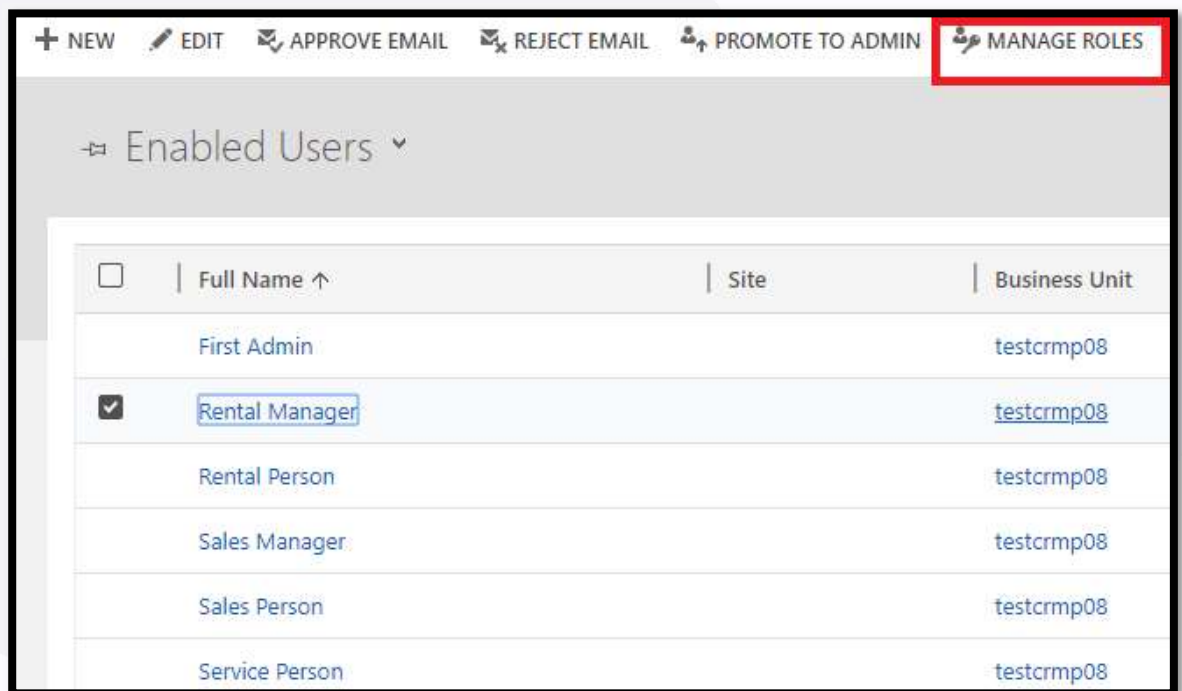
5.2 Assign security roles to users

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

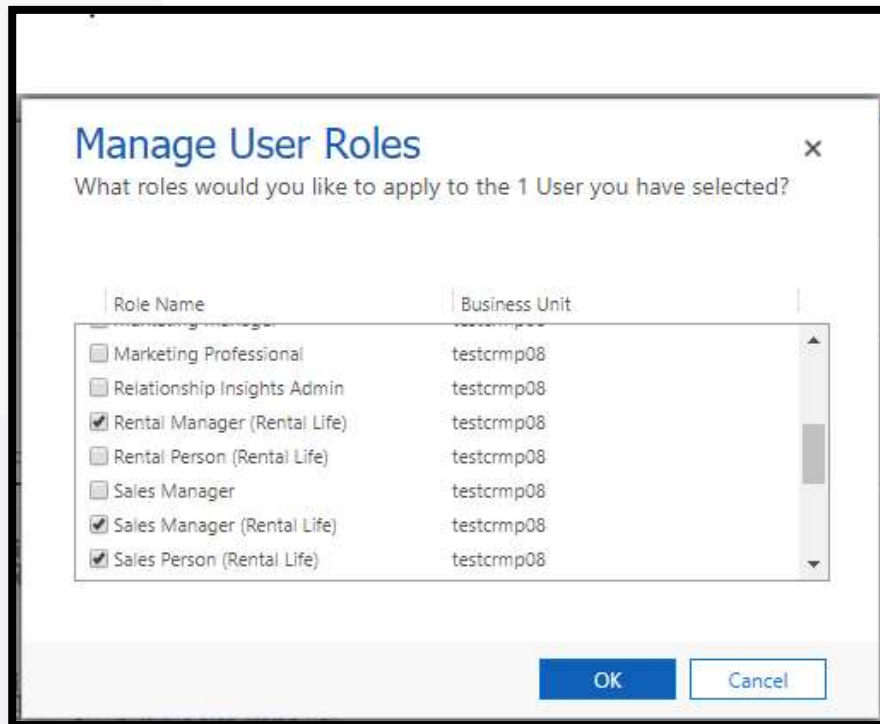




2. Select user, and click assign roles

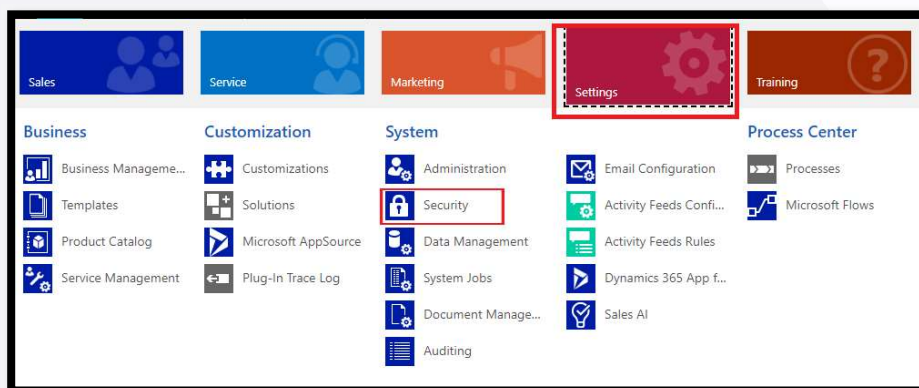


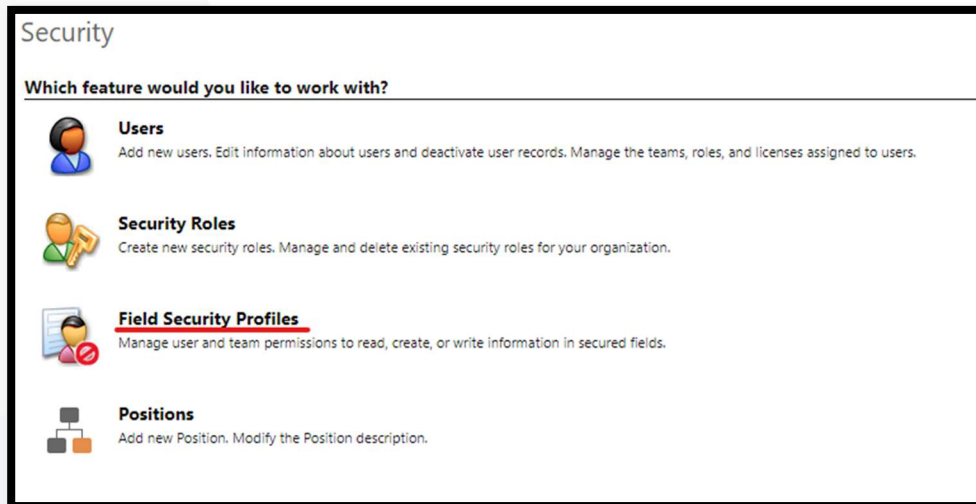
3. Select one or more Rental Life roles and save



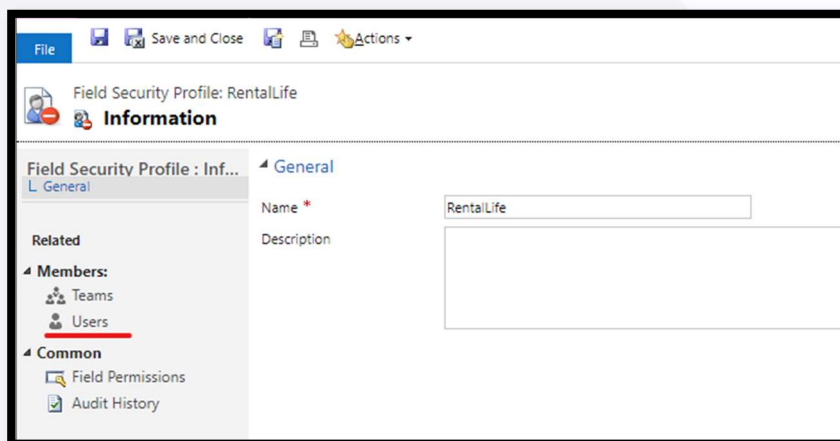
5.3 Assign Security Profile

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

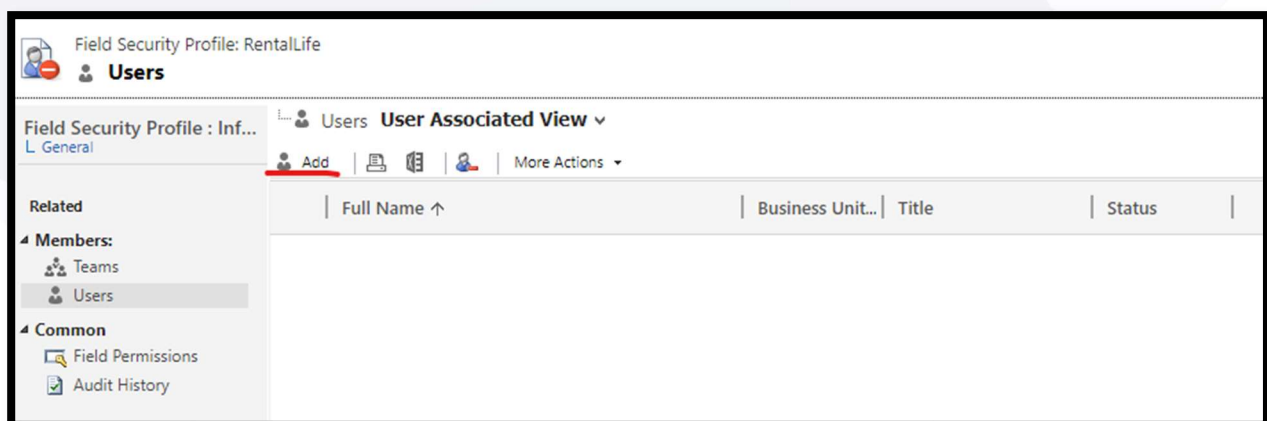




2. Open Field Security Profile "RentalLife"
3. Navigate to users from left side options



4. Add required users to profile



6. Templates

6.1 Template Types

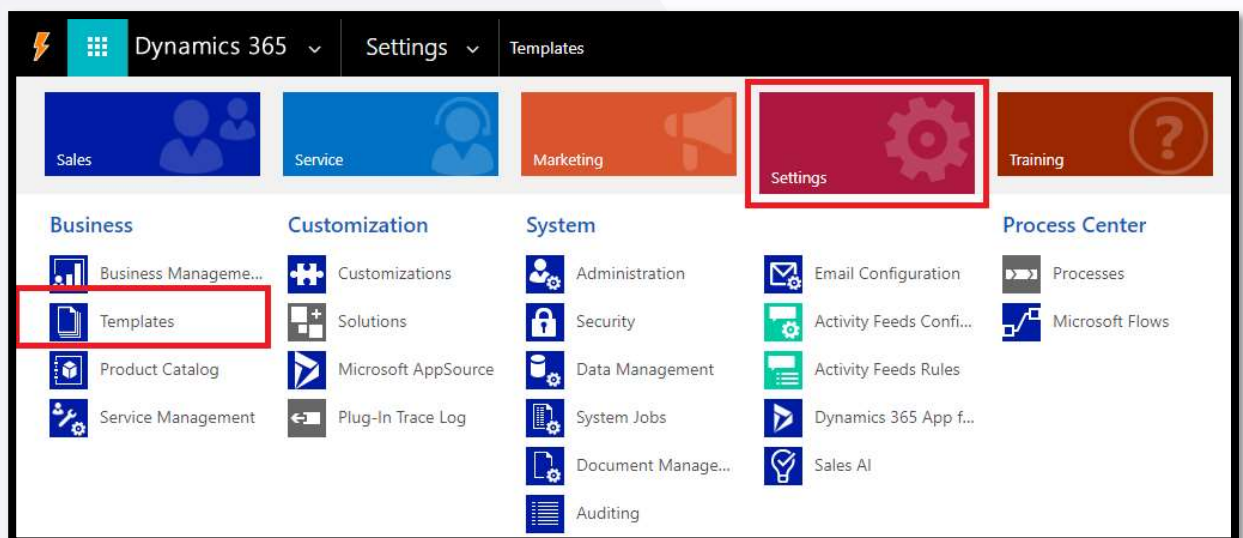
Document templates available (will be delivered separately) for RentalLife solution are:

1. Quote Rental Business
2. Invoice Rental Business

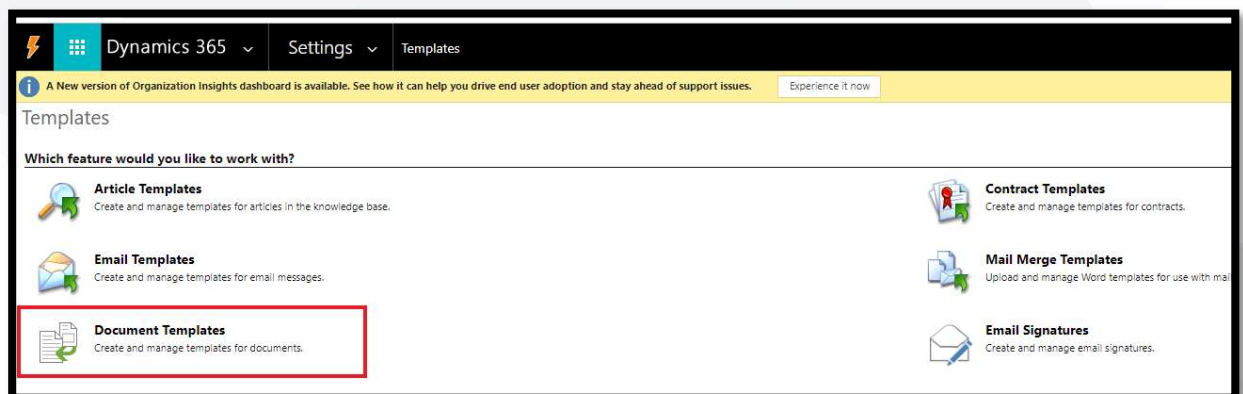
These templates will be used to generate quotes, orders and invoices based on information in CRM provided for Rental management.

6.2 Add templates to CRM

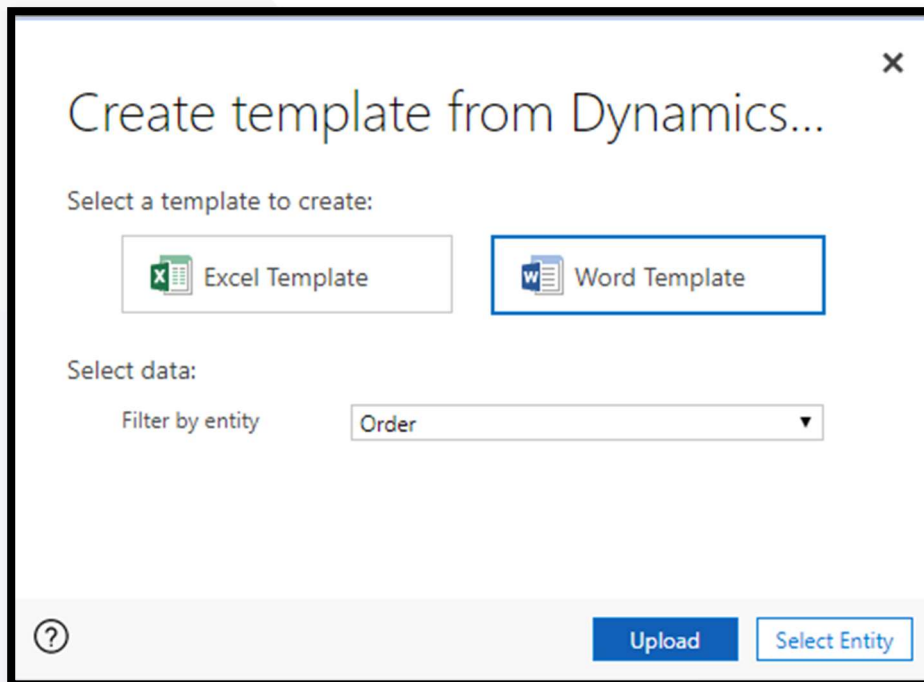
1. Go to Settings > Templates



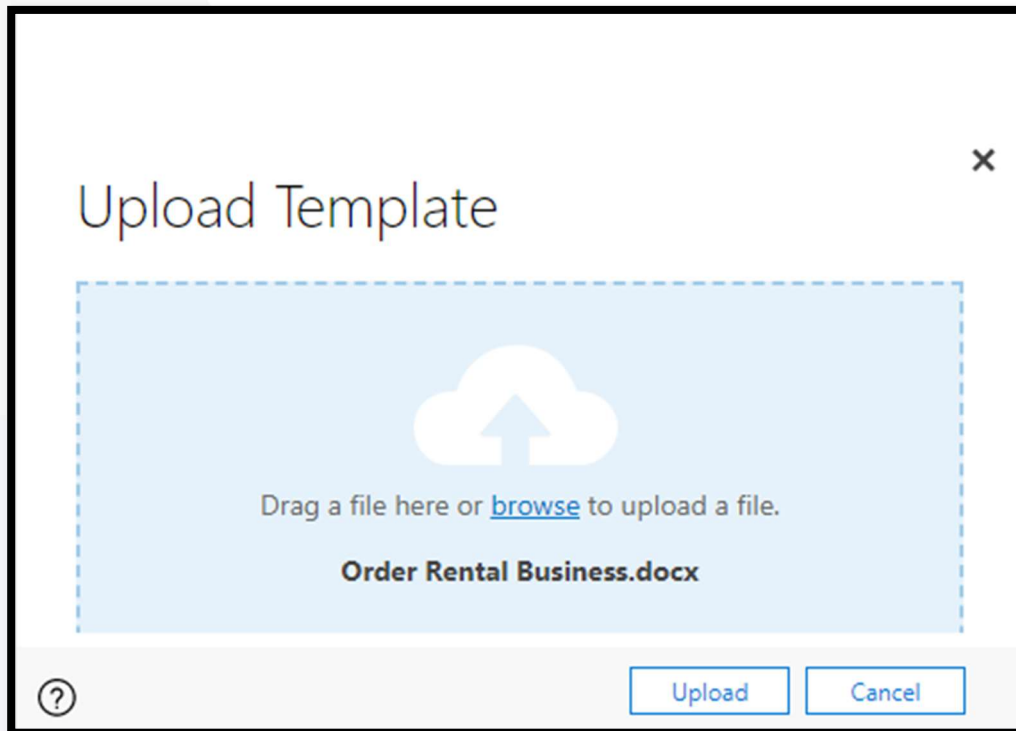
2. Click on Document Template



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.



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

