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

- 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

![Languages settings](image)

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.

![Language settings](image)
Language Settings
Select the languages to enable for your organization, and then click Apply.

Confirm Language Change
You have selected 1 language to change.

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.

OK Cancel

Language Settings
Select the languages to enable for your organization, and then click Apply.

Enabling 1 language(s).
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.

![Select Solution Package](image1)

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

![Solution Information](image2)
4. View solution package details button will open following screen (click Close to go back):

![Solution Details](image)

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](image)
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

11. Click on Request Licenses

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

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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Fields Service Status</th>
<th>Status Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery</td>
<td>Committed</td>
<td>Scheduled</td>
<td>FF8769</td>
</tr>
<tr>
<td>Return</td>
<td>Committed</td>
<td>Scheduled</td>
<td>FFAB03</td>
</tr>
</tbody>
</table>

Example of Booking Status:
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 used 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 Return**

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

![Add templates to CRM](image)

2. Click on Document Template

![Click on Document Template](image)
3. Click New to upload new template

![Create template from Dynamics dialog box](image)

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.