



RentalLife

A Complete Rental Solution with Field Service – User Guide

Marcel Schmidt
CRM Partners AG
Helfmann-Park 7 65760
Eschborn
1-11-2019

Table of content

1.	Basic Facts	5
1.1	What is RentalLife	5
1.2	What dose RentalLife Include	6
2.	System Overview	7
2.1	Sitemap	9
2.1.1	Web App	9
2.1.2	Unified App	9
2.2	Dashboard	10
2.3	Entites	10
2.3.1	Duplicate Detection	10
2.3.2	Currency	10
2.3.3	Subject / Classification	10
2.3.4	Unit & Unit Group	11
2.3.5	Product	11
2.3.6	Deprecation	11
2.3.7	Cost / Offerings	11
2.3.8	Organization Unit	11
2.3.9	Warehouse	11
2.3.10	Territory	11
2.3.11	Territory Warehouse Mappings	12
2.3.12	Customer Assets	12
2.3.13	Booakable Resources	12
2.3.14	Lead	12
2.3.15	Account	12
2.3.16	Contact	13
2.3.17	Opportunity	13
2.3.18	Opportunity Products	13
2.3.19	Quote	13
2.3.20	Order	13
2.3.21	Work Order	13
2.3.22	Bookable Resource Booking	14
2.3.23	Invoice	14
2.3.24	Maintenance	14
2.3.25	Schedule Board	14

2.3.26	RentalLife Settings	14
2.4	Resources	15
2.4.1	Workflow	15
2.4.2	Business Process Flow	16
2.4.3	Business Rules	16
2.4.4	Plugins	16
2.4.5	Scripts	16
3.	System Flow	18
3.1	System Setup & Configuration	18
3.1.1	Duplicate Detection	18
3.1.2	Currency	20
3.1.3	Subject	20
3.1.4	Unit & Unit Group	20
3.1.5	Price List	23
3.1.6	Products	23
3.1.7	Cost	24
3.1.8	Deprecation	25
3.1.9	Price List Items	25
3.1.10	Organization Unit	26
3.1.11	Warehouse	27
3.1.12	Territory	27
3.1.13	Territory Warehouse Mapping	27
3.1.14	Customer Assets	28
3.1.15	Booakable Resource	28
3.1.16	RentalLife Settings	28
3.2	Data Flow & Management	29
3.2.1	Account	29
3.2.2	Contact	29
3.2.3	Lead	29
3.2.4	Opportunity	29
3.2.5	Opportunity Products	30
3.2.6	Quote	31
3.2.7	Quote Products	31
3.2.8	Order	31
3.2.9	Order Products	32
3.2.10	Work Order	32
3.2.11	Bookable Resource Booking	33
3.2.12	Invocie	33

3.2.13	Maintenance & Repair	33
3.3	Graphical View	34
3.3.1	Schedule Board	34
4.	Addiotnal Functionality	35
4.1	Security Role	35
4.1.1	RLFS – Administrator	35
4.1.2	RLFS – Sales Person	35
4.1.3	RLFS – Service Engineer	35
4.2	Custom Apps	35
4.2.1	Web App	35
4.2.2	Unified Interface	35
4.3	Copy Instance	36
4.3.1	Full Copy	36
4.3.2	Minimal Copy	36

1. Basic Facts

1.1 What is RentalLife

CRM Partners has developed a specific CRM solution for the rental industry, with which the entire rental process, including machinery, plant, equipment and vehicles, can be professionally controlled - from the preparation of offers through inventory management to the maintenance and planning of replacement investments. The new Rental Solution is optionally both portal-capable and suitable for mobile end devices and allows a detailed evaluation of the leasing business by device type, region and customer. The reporting is user-friendly and graphical.

Respond faster to inquiries

In the very fast-moving rental business, the first person to respond to an inquiry is usually the most successful. With RentalLife and its daily updated data, the sales staff can have the real inventory of a product displayed at any time for a specific point in time and immediately inform the customer whether the requested object is available for the desired period and, if necessary, also suggest an alternative. There is no need for an enquiry in the warehouse or even a time-consuming investigation. In addition, RentalLife relies on a high degree of user-friendliness: the reporting, such as which machines are rented in which period, is displayed graphically and can therefore be included very quickly and intuitively in the bidding process. If an order is generated from a quotation, the system immediately recognizes that this specific machine is no longer in the pool for the specified time. At the next query, the system displays it as unavailable.

Enabling Self-Service

RentalLife is optionally internet-/ portal-capable and can therefore be easily integrated into your website. In this way, the customer has the option of checking for himself when the desired machine is available. He can also view his own bookings at any time.

Generate a continuous cash flow

Every company in the rental business is interested in letting his rental objects with as little idle time as possible. This is possible with the highly automated Asset Lifecycle Management of RentalLife. At the push of a button, it shows where each individual machine is currently located and when it will be available again

for a new lease. Not only already booked, future rentals are considered, but also the times for maintenance or transport.

Maintenance times are included

You can set regular maintenance work, such as that due after each rental, in the system for the product type, but also for the individual machine with the specific tasks and times. The system then automatically takes them into account for each new rental process. The always up-to-date information on which maintenance work is due and when are also helpful for the resource planning in maintenance.

Machinery remains up to date

Regardless of the accounting transactions, RentalLife has a function for determining depreciation. The employee responsible initially determines how the depreciation is calculated for each asset. In this way, you always know when a rental object is to be depreciated and, if necessary, replaced - with a corresponding lead time. This simplifies investment planning enormously, especially with a very large inventory, and prevents maintenance costs from rising or even the machinery from becoming obsolete.

Adapt to customer needs

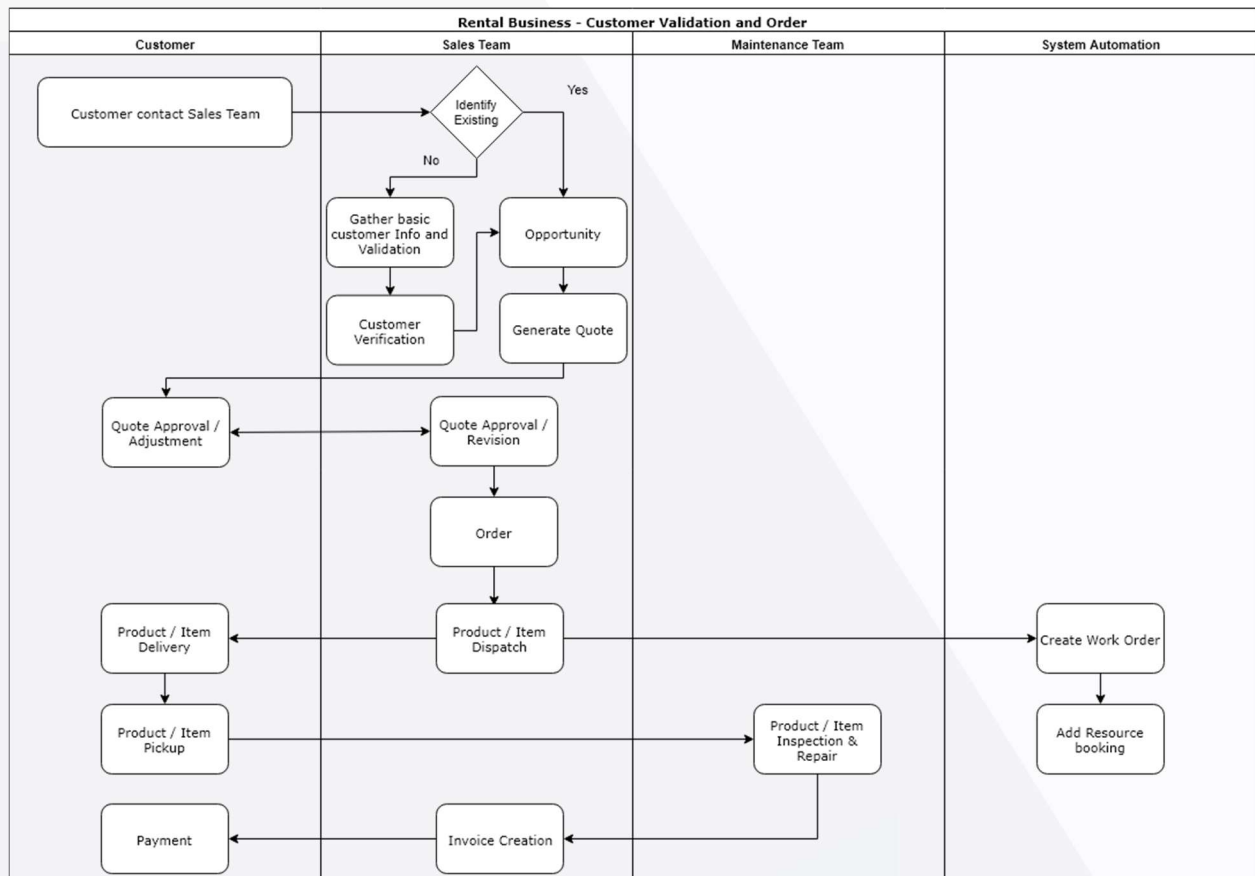
With RentalLife, existing data can be evaluated quickly and easily: for example, whether certain models of a machine are more in demand than others, and which regional or seasonal differences occur when leasing the individual assets. This information helps to plan according to demand and to carry out marketing and sales activities in a targeted manner.

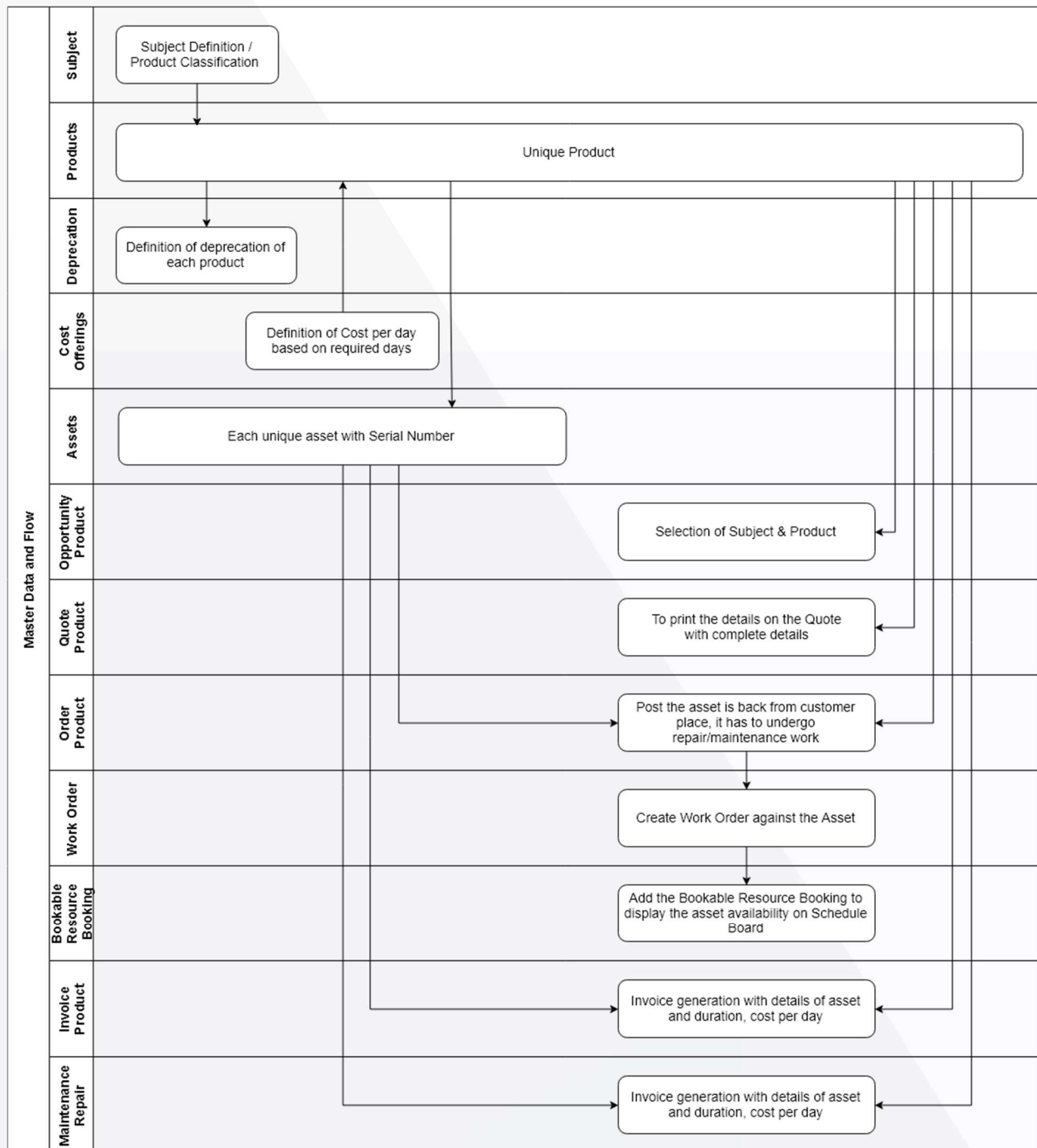
1.2 What does RentalLife Include

- Respond faster to inquiries based on the latest data and tell your customers if the requested rental item is available
- Comprehensive rental order management from quotation to invoice
- Rental and sales process using the same process flow
- Provide graphical representation of asset availability
- Real-time statistics on costs and revenue of rental equipment
- Full overview on outstanding rental activities
- Converted offers into orders will block the booked rental automatically for the rental period

2. System Overview

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.

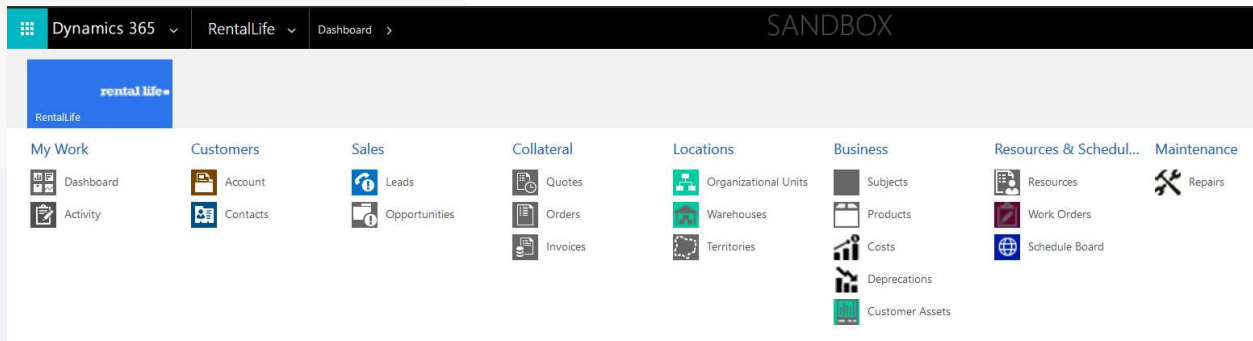




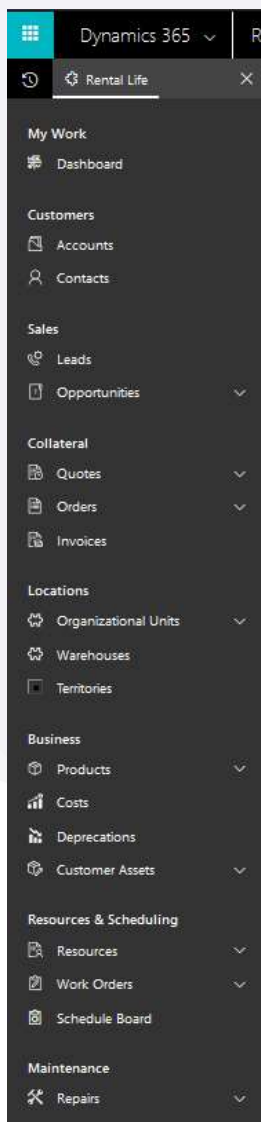
2.1 Sitemap

A sitemap is a website model that holds the link of all the pages in sorted way.

2.1.1 Web App



2.1.2 Unified App



2.2 Dashboard

{{Information to be added}}

2.3 Entites

The master records are the one-time entries to configure the system. The orders and asset reservation are work based on this data.

2.3.1 Duplicate Detection

To maintain the integrity of your data, it's a good idea to have rules in place to reduce duplicate records in the system. Dynamics 365 for Customer Engagement apps includes default duplicate detection rules for accounts, contacts, and leads, but not for other types of records. If you want the system to detect duplicates for other record types, you'll need to create a new rule. After you've created duplicate detection rules, you need to turn duplicate detection on.

2.3.2 Currency

Dynamics 365 for Customer Engagement is a multicurrency system, in which each record can be associated with its own currency. This currency is called the transaction currency. The multicurrency features enable users to perform financial transactions like opportunities, quotes, orders, and invoices in multiple currencies. This feature also provides a currency choice to the end user when a financial transaction occurs. Multiple records in different transaction currencies can be aggregated, compared, or analyzed about a single currency, by using an exchange rate. This is known as the base currency. You first define a base currency for the organization and then define exchange rates to associate the base currency with transaction currencies. The base currency is the currency in which other currencies are quoted. The exchange rate is the value of a transaction currency equal to one base currency.

2.3.3 Subject / Classification

Dynamics 365 for Customer Engagement apps includes a subject organizational structure that lets you mark and categorize service cases, knowledge base articles, products, and sales literature. By using the subject hierarchy, you can classify service cases to quickly provide service to your customer. You can also provide the appropriate sales literature. You'll also be able to better understand gaps in your sales literature, evaluate service quality by subject area, and improve reporting on the performance of your products.

2.3.4 Unit & 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. In Dynamics 365 for Sales, you first create a unit group and then create units within that group.

2.3.5 Product

Make it easier for your sales reps to increase their sales by creating a product catalog. The product catalog is a collection of products and their pricing information. To set up pricing, you need to define the units in which your products are sold, the amount to charge for each unit, and the discounts you want to offer based on volume purchased. Other than setting up the pricing for products, product catalog also supports product taxonomy that lets you create a rich classification of products. This helps ensure that your customers receive the most appropriate and complete solution.

2.3.6 Deprecation

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

2.3.7 Cost / Offerings

Product entity also shows subgrid Offerings. 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.

2.3.8 Organization Unit

Each company is different and so is the number of Organizational Units needed to set up your Microsoft Dynamics 365. From smaller companies with only one, to companies with multiple organizational units to meet their complex structure and global businesses – no number of Organizational Units is better than the other. The best configuration is one that fits your business.

2.3.9 Warehouse

Track your product inventory using a warehouse record in Customer Engagement. To do this, create a warehouse record, and then add your product inventory to it.

2.3.10 Territory

Improve sales potential and revenues by creating territories for customer and market segments in Dynamics 365 for Customer Engagement apps. Then assign appropriate sales people to handle the sales and revenue opportunities for those territories. Sales territories improve the sales potential because the members of a territory are focused on the services or sales within that territory. You can associate the financials directly with a territory and its members, which simplify business analysis. Also, based on the sales territory type and size, you can define sales methodologies and the training required for those locations.

2.3.11 Territory Warehouse Mappings

To link the Territory with multiple warehouse, this entity has used. This is the provision that allow to take rental asset from nearby wrehouse if it's not available into default warehouse.

2.3.12 Customer Assets

Customer asset functionality lets you maintain a list of serviceable items related to a service location. When you create and maintain a list of serviceable items, you can: Record specific information about the item. Create a historic log of all the work orders that are related to the item, which gives you a complete service history for the item. Customer asset records can be configured in a hierarchy to maintain service history at the sub-component level.

2.3.13 Booakable Resources

A resource in Dynamics 365 for Field Service is anything that needs to be scheduled. This can be users, crews, service centers, company assets (equipment), accounts, or contacts.

2.3.14 Lead

A lead represents any person or organization that a company might have the potential to do business with. Microsoft Dynamics 365 is used to store data about that lead. In fact, creating a Lead record of information about a new lead is often the first step users take in the sales process. For instance, if your company receives an inquiry on your website contact form about your product offerings, you would use a Dynamics 365 lead record to collect and store information about that person or business.

2.3.15 Account

Accounts are organizations with which you have a relationship. Since Microsoft Dynamics 365 is a customer relationship management solution, this is where customers would reside in your database. However, accounts can also contain other types of records including prospects, vendors, business partners, and other organizations that interact with your organization. For non-business organizations, such as government, healthcare, and education, the account is also where any organization would likely be kept.

2.3.16 Contact

Contacts are individual people with whom you have a relationship. Often contacts are related to an account, but certain organizations and businesses may serve or sell to individual consumers, and so most of the contacts will not be under accounts.

2.3.17 Opportunity

Opportunities in Microsoft Dynamics 365 are the core record type in the sales process. Used by the sales team, opportunities represent a potential sale for a specific customer. The creation of an opportunity adds this potential sale to the sales pipeline and therefore puts it on the radar of the sales manager who may be holding the team responsible for the progress of opportunities. In addition to creating a pipeline, opportunities allow organizations to track the success of marketing efforts by tracking sales back to the original lead source and source campaign. In the same way, when an opportunity is lost, lost reasons and competitors can be tracked. Organizations that determine the product catalog fits their requirements can optionally use the product catalog.

2.3.18 Opportunity Products

If your organization is using the product catalog, this is where you can tie products to the Opportunity. Products associated with an Opportunity will pull into any Quotes, Orders, Invoices generated from the Opportunity.

2.3.19 Quote

The use of Quotes is optional. If you choose to not use Quotes, it is recommended that you disable Quotes for all users in security roles. Quotes can be created two ways: from an Opportunity using System Calculated pricing or from the Quotes area by clicking on New in the command bar. Multiple quotes can be created from one Opportunity to reflect special pricing offers.

2.3.20 Order

Orders are accepted quotes, and document what specific products or services the customer is buying. Orders can be created by selecting the Create Order button on an active quote. It is optional to use orders, and if they are used it is common to integrate them with an ERP system.

2.3.21 Work Order

A work order in Dynamics 365 for Field Service has information on what work needs to be done. It is used to coordinate and schedule resources and activities. It can be used for different types of work, such as

installations, repairs, or preventive maintenance. A work order is usually created from a case or opportunity. It is then scheduled either manually or using the schedule assistant and then dispatched. Once the work is complete, it is reviewed and approved by a manager. Products, service tasks, and characteristics are added automatically when you create a work order from an incident. Otherwise you can add them manually when you create a work order.

2.3.22 Bookable Resource Booking

Represents the line details of a resource booking.

2.3.23 Invoice

Invoices are the final stage of the sales cycle. Invoices are how you bill your customers. Invoices are created after an order has been fulfilled. Microsoft Dynamics 365 for CRM is not meant to be a complete financial management system. If Invoices are being used in CRM, CRM is typically integrated with a financial management or ERP system. Like Orders, Invoices can be created by two different methods.

2.3.24 Maintenance

Once the item/asset back from customer from customer place, the item must be undergoing maintenance. And the details about the maintenance will maintain in this section.

2.3.25 Schedule Board

The Dynamics 365 for Field Service schedule board provides an overview of resource availability and bookings you can make. Before you use the schedule board, it is important to set up the views and filters to your preference.

2.3.26 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 system.

Time Calculation

Adding the additional bookable resource bookings to Schedule board for moving asset 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 side, 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 to 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)

2.4 Resources

A Microsoft Dynamics 365 process is a definition for an automated workflow consisting of steps, including the actions the workflow should take at each step, and the rules the workflow should use to proceed to the next step. There are three categories of processes: a Business Process Flow, a Workflow and a Dialog.

2.4.1 Workflow

Dynamics 365 workflows consist of a series of steps and rules that serve to automate a business process. A workflow can run on an out-of-box entity or a custom entity. Workflows can be initiated manually, or they can be initiated automatically, in a number of different ways.

2.4.2 Business Process Flow

A Business Process Flow in Microsoft Dynamics 365 is a tool which is meant to help guide users through a business process in the system. Business process flows are representations of your business processes and are displayed visually in Dynamics 365 as a heading across the top of an entity form. A business process flow is composed of Stages, and within each stage there are Steps to complete which are fields. In the business process flow heading, a user can see which stage they are at in the process, and which steps they need to complete before they proceed in the process.

2.4.2.1 Lead2Invoice

For any new customer, that shown interest into business start from Lead. Once the Lead qualified, it becomes an Opportunity where the sales staff gather the customer requirement and add as Opportunity Products. From the Opportunity, the Quote are generated. Once the quote has approved by customer, the Order and Invoice will be created respectively.

2.4.2.2 Opportunity2Invoice

For existing customer, the process start from Opportunity linking the existing Account and Contact. The further process remains the same.

2.4.3 Business Rules

Business rules provide a simple interface to implement and maintain fast-changing and commonly used rules. They can be applied to Main and Quick Create forms, and they work in Dynamics 365.

2.4.4 Plugins

A plug-in is custom business logic (code) that you can integrate with Dynamics 365 to modify or augment the standard behavior of the platform. Another way to think about plug-ins is that they are handlers for events fired by Dynamics 365 apps. You can subscribe, or register, a plug-in to a known set of events to have your code run when the event occurs.

2.4.5 Scripts

The most common use of JavaScript in Dynamics 365 for Customer Engagement is to add functions as event handlers for entity form events. Client-side scripting using JavaScript is one of the ways to apply custom business process logic for displaying data on a form in Customer Engagement.

3. System Flow

This section will be described the system flow in detail

3.1 System Setup & Configuration

This section will describe the all master records that needs to be created after installing the solution "Rental Life" into Dynamcis 365 organization. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions to setup and configure the system.

3.1.1 Duplicate Detection

Create or edit a Duplicate Detection Rules

1. Go to Settings > Data Management.
2. Choose Duplicate Detection Rules.
3. To create a new duplicate detection rule, choose New. Type a name and description.
–OR–
To edit an unpublished existing duplicate detection rule, choose the duplicate detection rule.
–OR–
To edit a published duplicate detection rule, select the rule. On the Actions menu, choose Unpublish, and then choose the rule.
4. Select the criteria to be used to identify a record as a duplicate.
 - If you are creating a new rule:
 - In the Duplicate Detection Rule Criteria section, in the Base Record Type list, choose the type of record that this rule applies to. For example, select Contacts.
 - In the Matching Record Type box, choose the type of record to compare. In most cases, you'll probably want to use the same record type for Base Record Type and Matching Record Type. It's also useful to be able to compare different record types. For example, you might want to compare the Email field in Contacts to the Email field in Leads.
 - If you want the rule to consider only active records while detecting duplicates, select the Exclude inactive matching records check box. You should also select this check box if your duplicate detection rule criteria are based on a status field.
 - If you want the rule to be case-sensitive, select the Case-sensitive check box.

- If you selected different record types for the base and matching record types, for each new criterion, in the Base Record Field column, choose Select, and then choose a field name. In the same row, in the Matching Record Field column, choose Select, and then choose a field name.

–OR–

If you selected the same record types for the base and matching record types, for each new criterion, in the Field column, choose Select, and then choose a field.

- In the same row, in the Criteria column, choose Select, and then choose an operator. For example, select Exact Match.
- If you specified Same First Characters or Same Last Characters, in the No. of Characters column, choose Enter Value, and then enter the number of characters to compare.
- If you don't want the rule to consider blank fields (null values) as equal while identifying duplicates, select the Ignore Blank Values check box.

Note: If the duplicate detection rule contains only one condition, blank values are ignored during duplicate detection job.

The number of criteria that you can select is limited by the number of characters that can be stored in the matchcode for the record. As you add criteria, watch the Current matchcode length value shown at the bottom of the criteria list.

General

Name *

Find duplicate records in Contacts and Leads

Status Reason *

Unpublished

Description

Matches records using Email field from Contact and Lead record types

Duplicate Detection Rule Criteria

Base Record Type *

Contact

Matching Record Type *

Lead

Case-sensitive

☐

Exclude inactive matching records

☐

Clear

Base Record Field	Matching Record Field	Criteria
<div> <div>▼</div> <div>Email</div> <div>Select</div> </div>	Email	<div>Exact Match</div> <div>▼</div>

5. When you're finished adding criteria, choose Save and Close.

6. To make the new or changed duplicate detection rule usable, select the rule, and then choose Publish.

When you publish a duplicate detection rule, a matchcode is created for every record in the matching record type for that rule. You can publish only five rules for the same base record type (Account, for example) at a time. You might need to delete or unpublish an existing rule if you bump up against this limit.

Note: We recommend that you set the duplicate detection criteria on a field that has unique values, for example, Email. You can have more than one duplicate detection rule for each record type.

3.1.2 Currency

Add new Currency

1. Go to Settings > Business Management.
2. Click Currencies.
3. Click New.
4. Select the three-letter ISO Code of the currency to set up and set the exchange rate with the base currency.

3.1.3 Subject

Create or edit a subject

1. In the Customer Service Hub sitemap, go to Service Management > Subjects.
2. To add a subject, select Add Subject.
-OR-
To edit a subject, in the subject tree, select a subject, and then select Edit Subject.
3. In the Subject dialog box, enter the required information:
 - Title: Type a name for the subject. This is a required field.
 - Parent Subject: To search for and select a parent subject for the new subject, select the Lookup button.
 - -OR-
 - To make the new subject a parent subject, select the Parent Subject box.
 - Description: Type a descriptive statement about the subject.
4. Select Save.

Remove a subject

To remove a subject from the subject tree, select the subject and select Remove Subject.

3.1.4 Unit & Unit Group

Create a unit group

1. Go to Settings > Product Catalog.
2. Select Unit Groups.
3. To create a new unit group, select New.

-OR-

To edit a unit group, open a unit group from the list.

4. Fill in your information:
 - Name. Type a meaningful name for the unit group. In our example, you would type "Seeds."
 - Primary Unit. Type the lowest common unit of measure that the product will be sold in. In our example, you would type "packet." Other examples could include ounces, hours, or tons, depending on your product or service.

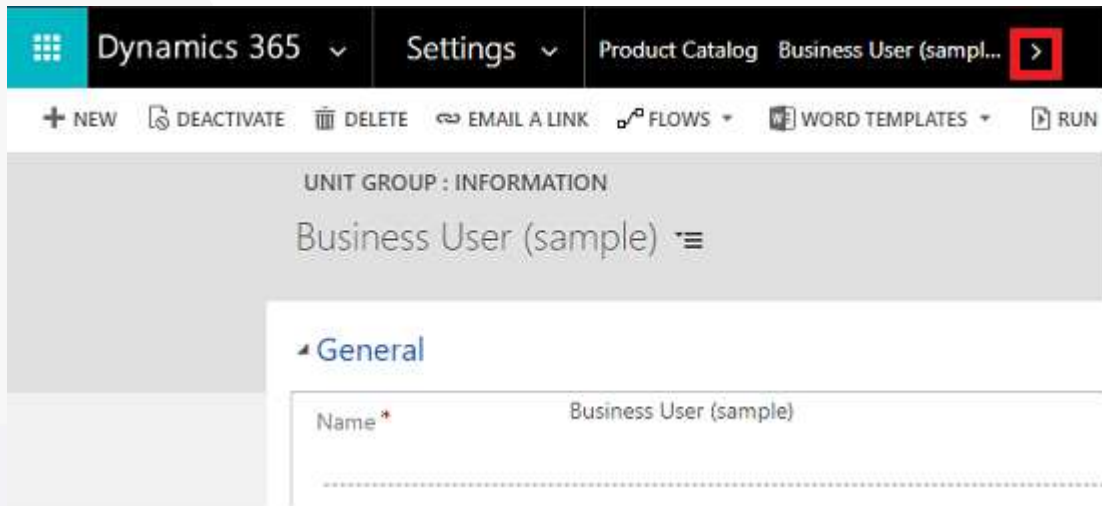


5. Select OK.

Note: You cannot delete the primary unit in a unit group.

Create units in a unit group

1. In the unit group record you want to add the units to, on the nav bar, select the arrow next to the record name, and then under Common, select Units.



Dynamics 365 Settings Product Catalog Business User (sample) >

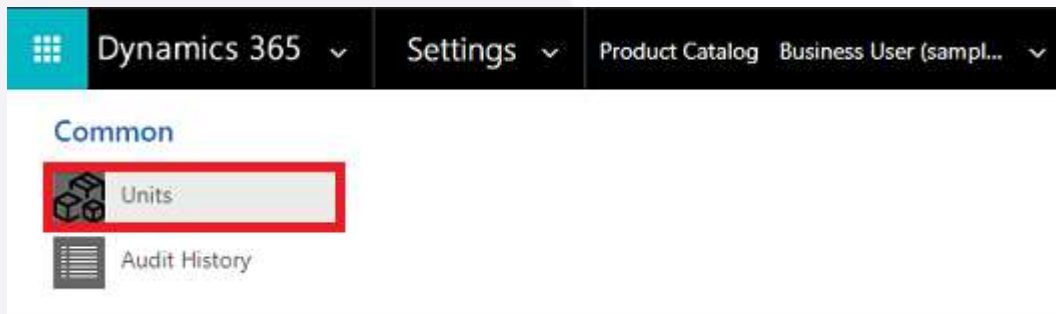
+ NEW DEACTIVATE DELETE EMAIL A LINK FLOWS WORD TEMPLATES RUN

UNIT GROUP : INFORMATION

Business User (sample) ⋮

General

Name * Business User (sample)



Dynamics 365 Settings Product Catalog Business User (sample) >

Common

Units

Audit History

2. Select Add New Unit.

The unit that you specified as the primary unit earlier is already in the list of units.

3. Fill in your information:

- Name. Type a meaningful name for the unit. In our example, you would type "box."
- Quantity. Type the quantity that this unit will contain. For example, if a box contains 12 packets, you would type "12."
- Base Unit. Select a base unit. The base unit will establish the lowest unit of measurement for the unit you're creating. Using our example, you would select "packet."

If you then create a unit called "pallet," and one pallet contains 48 boxes, you would type "48" in Quantity and select "box" in Base Unit.



Unit Units

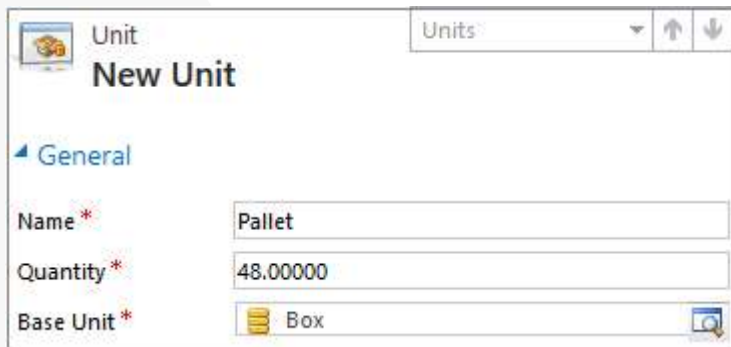
New Unit

General

Name * Box

Quantity * 12.00000

Base Unit * 1 packet



4. Select Save or Save and Close.

3.1.5 Price List

Create a price list

1. Go to Settings > Product Catalog.
2. In the Product Catalog area, select Price Lists.
3. To create a new price list, select New.
- OR-
- To edit a price list, open a price list from the list.
4. Fill in your information. Use the handy tooltips as a guide.
5. Select Save.

Note: You must create at least one price list for each of the currencies that your organization does business in.

3.1.6 Products

Create a product

1. Go to Settings > Product Catalog.
2. In the Product Catalog area, select Families & Products.
3. If you want to create a child product to an existing product family, select the family in the list, and then select 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.
- OR-
- If you want to create an independent product, simply select Add Product.
4. 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.

Note: The Valid From and Valid To fields define how long a product is valid for. There's no business logic associated with these fields except that the Valid To date must be later than the Valid From date. If required, you can implement your own business logic in these fields with a workflow, plugin, or by using the Dynamics 365 Customer Engagement Web Services. For example, run a scheduled job to automatically retire last season's products using the date selected in the Valid To field.

5. Select Save.
6. In the Price List Items section, select the Add a Record button Add a record button, and create a price list item for each unit the product is available in.
7. In the Default price list box, select a default price list. This price list is used for calculations when the associated price list in the opportunity or order for the product does not contain a price definition of the product.

Note: A price list will be available for selection only when the product you're creating is added to it as a price list item (as described in Step 7).

8. 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 selecting the name, and selecting Override.

Note: You can't add properties to an independent product.

9. In the Product Relationships section, select the Add a Record button Add properties button, and select a related product.
10. Select the Save button in the bottom-right corner.
11. After you're done adding all the details, make sure to review everything and ensure it's correct. On the command bar, select 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.
12. After you're done verifying, select done.

3.1.7 Cost

Configure Rental Cost to Product

1. Go to Settings > Product Catalog.
2. In the Product Catalog area, select Families & Products.
3. Open the existing product that needs to be configured for Rental Costing

4. Change the display form to "Rental Business"
5. Bottom part of Product entity shows subgrid Offer Cost. To add new cost/offering, Click on Add New Cost, or + above Offer Cost subgrid on custom interface.
6. Specify the duration as Days From & Days To with Cost (Per Day) and currency
Note: The product can be configured with multiple currency and location

3.1.8 Deprecation

Configure Rental Deprecation to Product

1. Go to Settings > Product Catalog.
2. In the Product Catalog area, select Families & Products.
3. Open the existing product that needs to be configure for Rental Deprecation
4. Change the display form to "Rental Business"
5. Bottom part of Product entity shows subgrid Deprecation. To add new depreciation, Click on Add New depreciation, or + above Deprecation subgrid on custom interface.
6. The depreciation can be configured as Per day or custom period
Note: The product can be configured with multiple currency and location

3.1.9 Price List Items

Add items to the price list

1. In the price list record, in the Price List Items section, select the Add Record button Add a record button.
2. Fill in your information. Use the handy tooltips as a guide.
 - In the Product and Unit box, select the product and unit for which you're creating this price list item.
 - To offer a discount on the combination of the product and unit, select a discount list.
 - In the Quantity Selling Option drop-down box, select whether the product or service can be ordered in whole, partial, or both types of quantities. This information is used in the Quantity field of Quote Product, Order Product, and Invoice Product records:
 - No Control. Dynamics 365 for Sales doesn't enforce a quantity selling option.
 - Whole. Selling a partial product isn't allowed. For example, digital cameras cannot be sold in fractions.
 - Whole and Fractional. The product can be sold both in whole and fractional units. For example, wood chips can be sold in cubic yards, or in fractions of a cubic yard.

- In the Pricing Method drop-down box, select an option that determines how the pricing will be calculated. It could be a certain amount, or a percentage of the current or standard cost. The available options are as follows:
 - Currency Amount. Use this to ignore a product's list price in the product catalog and to enter a different price manually for this price list.
 - Percent of List. Use this to calculate a product's price in the price list as a percentage of the list price of the associated product.
 - Percent Markup - Current Cost. Use this to add a percent markup on top of the current cost of the product.
 - Percent Markup - Standard Cost. Use this to add a percent markup on top of the standard cost of the product.
 - Percent Margin - Current Cost. Use this for the price offered in the price list to yield a percentage margin of the current cost of the product.
 - Percent Margin - Standard Cost. Use this for the price offered in the price list to yield a percentage margin of the standard cost of the product.
 - If you selected Currency Amount as the pricing method, in the Amount box, type the amount at which the product will be sold.
- OR-
- If you selected any value other than Currency Amount as the pricing method, type the percentage for the pricing method that you want.
- If you selected a pricing method other than Currency Amount, you can set up a rounding policy. For example, if you want per unit prices to be in the form of \$0.99, you can select a rounding policy where all prices per unit automatically have a price that ends in 99 cents. To do this, you select the rounding policy to round the price up, and then set the price to end in a certain amount, such as 99 cents.
 - None. Prices are not rounded.
 - Up. Prices are rounded up to the nearest rounding amount.
 - Down. Prices are rounded down to the nearest rounding amount.
 - To Nearest. Prices are rounded to the nearest rounding amount.
 - In the Rounding Option drop-down box, select Ends in or Multiple of if you want the price to end in a certain amount or multiples of a certain amount.
 - In the Rounding Amount box, enter the amount.
3. Select Save.

3.1.10 Organization Unit

Create an Organization Unit record

1. From the main menu, click Resource Scheduling, and then choose Organization unit.
2. On the Active Organization Unit screen, click +New in the upper left corner.
3. Use the tooltips to help fill in your information, and then click Save.

3.1.11 Warehouse

Create a warehouse record

1. From the main menu, click Field Service > Administration, and then choose Warehouses.
Or, from the main menu, click Field Service > Warehouses.
2. On the Active Warehouse screen, click +New in the upper left corner.
3. Use the tooltips to help fill in your information, and then click Save.

3.1.12 Territory

Create a sales territory

1. Go to Settings > Business Management.
2. Choose Sales Territories.
3. On the command bar, choose New.
4. Fill in your information.
 - Name. Enter the geographical name for the territory such as the name of a city, country/region, or a state.
 - Manager. Enter the name of the user who is the manager for this territory. This person would typically assign leads to salespeople.
Important: You can't allocate the same user to multiple territories. If you need to assign a user to a larger area (more than one existing territory), create a new territory that includes the existing territories, and then assign the user to that new territory.
 - Description. Enter any details that you'd like to include for this territory, for example, "Sales territory created for education and training."
5. When you're done, on the command bar, choose Save or Save and Close.
6. To assign members to a sales territory, open the territory, and then in the left pane, under Common, choose Members.
7. On the Users tab, in the Records group, choose Add Members.
8. In the Look Up Records dialog box, select a user, and then choose Add.

3.1.13 Territory Warehouse Mapping

Create Territory Warehouse Mapping

1. Open the existing territory
2. Ensure that form set to Rental business
3. On the associated warehouse section click +New in the right corner
4. The quick create page will appear
5. By default, the territory has already linked
6. Specify the Warehouse, Travel time (format: HH:MM) between Warehouse and Territory and distance (in KM) also specify if this warehouse will be the default for linked territory
7. By default, the first record added as link between territory and warehouse will be consider as default.

3.1.14 Customer Assets

Create customer assets

1. From the main menu, click Field Service > Customer Assets.
2. On the Active Customer Assets screen, click New. Use the tooltips to help you fill in information.
3. Enter the Name of the customer asset record.
4. Enter the Service Account to indicate the service location of the customer asset.
5. Optionally, enter the direct Parent of the current asset if you are creating a sub-component customer asset. For example, a refrigerator asset record can be the parent asset to a compressor asset record.
6. Optionally, enter the Product from the product catalog that identifies this asset.
7. When you're done, click Save.
8. In the Sub Assets section, click Add Customer Asset record to add any related assets.

3.1.15 Bookable Resource

Create Bookable Resource

1. From the main menu, click Field Service > Administration, and then choose Bookable Resource Categories.
2. On the Active Resource Categories screen, click +New in the upper left corner.
3. Use the tooltips to help fill in your information, and then click Save.

3.1.16 RentalLife Settings

Create Setting

1. Navigate to RentalLife settings unified app
2. Open setting record for modifying existing record or create new record for business unit

3.2 Data Flow & Management

This section will describe the all daily use records that needs to be created after installing the solution "Rental Life" into Dynamcis 365 organization.

3.2.1 Account

Create an Account record

1. From the main menu, click Sales, and then choose Account.
2. On the My Active Account screen, click +New in the upper left corner.
3. Use the tooltips to help fill in your information, and then click Save.

3.2.2 Contact

Create Contact record

1. From the main menu, click Sales, and then choose Contact.
2. On the My Active Contact screen, click +New in the upper left corner.
3. Use the tooltips to help fill in your information, and then click Save.

3.2.3 Lead

Create a lead

1. Go to Sales > Leads.
2. Select New.
3. In the Summary area of the Lead form, enter your lead's company and contact information.
4. In the Details area of the Lead form, enter information about your lead's industry and preferred contact method.
5. Add any notes or activities (for example, phone calls or emails) related to this lead.
6. In the Stakeholders section, select the Add Connection record button Add Connection record button to add a contact as a stakeholder. A stakeholder is a key contact at the account who will be involved in decision-making.

In the Lookup box, enter a name or select the Lookup icon to choose from a list of suggestions. To create a new contact, select + New. By default, the contact you add is assigned the Stakeholder role. Select the Role corresponding to the contact to select a different role such as Decision Maker or Technical Buyer.

7. Select Save in the lower-right corner of the form.

3.2.4 Opportunity

Create an Opportunity

1. Go to Sales > Opportunities.
2. Select New.
3. In the Summary area, enter the company and contact information for the opportunity.
4. In the Details area of the Opportunity form, enter information about your opportunity's industry and preferred contact method also set the Opportunity Type to "Rental".
5. Add any notes and activities (for example, phone calls or emails) related to this opportunity. More information: Keep track of notes, tasks, calls, or email with activities
6. In the Stakeholders section, select the Add Connection record button Add Connection record button to add a contact as a stakeholder. A stakeholder is a key contact at the account who will be involved in decision-making.

In the Lookup box, enter a name or select the Lookup icon to choose from a list of suggestions. To create a new contact, select + New. By default, the contact you add is assigned the Stakeholder role. Select the role corresponding to the contact to select a different role such as Decision Maker or Technical Buyer.
7. In the Sales Team section, select the Add Connection record button Add Connection record button, and then select + New Connection to add a member of the sales team (from your organization).
8. To add competitors, in the Competitors area, select +.
9. Select Save in the lower-right corner of the screen.

3.2.5 Opportunity Products

Add Opportunity Products to Opportunity

1. In the list of opportunities, open the opportunity to which you want to add products.
2. Go to the Product Line Items tab.
3. Select a Price List. The price list determines the cost of the product. Selecting a price list is required to be able to add products to an opportunity.
4. If you want the estimated revenue of the opportunity to be calculated based on the total amount of products, set Revenue to System Calculated. If you want to use a custom estimated revenue, set it to User Provided.
5. In the Product Line Items grid, select Add New Opportunity Product.
6. In the New Opportunity Product form, do the following:
 - Select Product: Set the switch to choose whether you want to add an existing product or create a new one:
 - To use an existing product, select Lookup to search for and add a product.
 - To create a product, select Write-In, and then enter the name of the product.

- Pricing. Select the pricing option. By default, this is the per unit price that is listed in the product catalog. To override the catalog price, select Override Price. When you override the price, you can specify a price that you want to charge for each unit of the product.
 - Quantity. Enter the quantity of the product or service that will be included.
 - Manual Discount. If you want to offer a discount to the product price, enter it here.
 - Tax. If required, enter the appropriate tax amount.
7. Select Save.

3.2.6 Quote

Create a quote from an opportunity

1. Go to Sales > Opportunities.
2. Select the opportunity you want to add a quote to.
3. In the Quotes area of the Opportunity form, select +.
4. To add products from your opportunity to your quote, select Get Products at the top of the Quote form, and then select OK.
5. Enter shipping and payment information in the Shipping Information area of the Quote form.
6. Enter the billing and shipping addresses in the Addresses area of the Quote form.
7. Select Save in the lower-right corner of the screen.
8. When your quote is ready to send to your customer, select Activate Quote at the top of the screen.

3.2.7 Quote Products

Verifying the Quote Products

1. By default, the quote products will be added to Quote from the Opportunity

3.2.8 Order

Create an order from a quote

1. Go to Sales > Quotes.
2. Select the quote you want to create an order from.
3. On the command bar, select Activate Quote.
4. Select Create Order at the top of the Quote form.
5. In the Create Order dialog box, the Date Won field is set to the current date. Select a different date if required.
6. Add a description and select OK.
7. To add products from your opportunity to your quote, select Get Products at the top of the screen, select your opportunity, and select OK.

8. Select Save in the lower-right corner of the screen.

Note: Your base record and all its line items must use the same currency. For example, if your order has the currency set to U.S Dollars, you must use the same currency for the price list items that you add to the order. You can't change the currency of the base record (in this case, an order), unless you remove all the line items associated with the record. Similarly, if the order is created from a quote that is generated from an opportunity, it must use the same currency as the opportunity.

3.2.9 Order Products

Verifying the Order Products & Link with Asset

1. By default, the Order products will be added to Order from the Quote
2. For product with multiple quantity will be added as multiple lines based on quantity
3. Each line item must link with Customer Asset that are available into stock state and with same warehouse.

3.2.10 Work Order

Create a work order

1. From the main menu, click Field Service > Work orders.
2. Click +New in the upper-left corner.
3. Fill in your information. Use the handy tooltips as a guide.
 - Summary
 - General: Fill in the basic information regarding the work order, such as the work order number and the service account it is associated with, a brief summary, and status, which can show whether the work order is unscheduled, scheduled, in progress, or finished.
 - Primary Incident: Enter more information regarding the nature of the work to be performed.
 - Total: Enter pricing information for the work order. This will show total pricing information for tasks, including products and services.
 - Settings
 - General: Specify the category the work order may fall into. Also, fill in important information regarding the location of the work order, price list, service territory, and more.
 - Sales tax: Sales tax information is inherited from the service account.
 - Preferences: Enter the resource and time information for the work order.
 - Follow up: Shows instructions of how to proceed if desired, or whether the work order calls for a follow-up.

- Related to: Specify if the work order is related to an originating work order or agreement.
- Preferences: Specify any preferred time windows.
- Source: Specify source information regarding the work order.
- Address: The address where the work will be performed. The address should be inherited from the service account.
- Location: Shows the address location on the map.

3.2.11 Bookable Resource Booking

To display the asset bookings over the schedule board, this records are used. This records will be created by system (RentalLife Automation).

3.2.12 Invoice

Create an invoice

1. Go to Sales > Invoices.
2. Select New.
3. Add your customer's contact information.
4. Select Save in the upper-left corner to create the invoice record.
5. To add products from your opportunity to your order, select Get Products at the top of the screen, select your opportunity, and then select OK.
6. To add information about a product on the invoice, in the Products area, select Add a Product Add button, and then select 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: Products from a previously created opportunity

You need to enter the tax amount when you add a product to a quote, order, or invoice. Dynamics 365 for Sales 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.

7. In the Shipping Information area, enter shipping details.
8. In the Addresses area, enter shipping and billing addresses.
9. Select Save in the lower-right corner of the screen.

Note: You close an invoice either by canceling the invoice or setting the invoice status as paid.

3.2.13 Maintenance & Repair

Start Maintenance/Repair Activity

1. Go to RentalLife > Repairs
2. Open the already existing record with (Product, Serial Number)
3. Change the status to "In Progress" from "New"
4. Save the record

Complete Maintenance/Repair Activity

1. Go to RentalLife > Repairs
2. Open the already existing record with (Product, Serial Number)
3. Change the status to "Completed" from "In Progress"
4. Save the record

3.3 Graphical View

The graphical representation of assets with availability with help of UI, to identify the asset bookings and movements.

3.3.1 Schedule Board

View the schedule board

1. To view the schedule, from the main menu, click Resources Scheduling > Schedule Board.

4. Additonal 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 RLFS – Administrator

User with “RLFS – Administrator” 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 RLFS – Sales Person

User with “RLFS – 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.

4.1.3 RLFS – Service Engineer

User with “RLFS – 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.

URL: <https://crmprentallife.crm4.dynamics.com/Apps/RentalLifeWeb>

4.2.2 Unified Interface

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

URL: <https://crmprentallife.crm4.dynamics.com/Apps/RentalLifeUI>

4.3 Copy Instance

NOTE: You will need global administrator credentials to copy from production to sandbox.

1. Go to the Office 365 admin center and sign in.
2. Choose Admin > Dynamics 365.

You should see a list of your Dynamics 365 instances. If you do not, click the Instances tab.

3. Highlight the instance you want to copy from. This will be your Source Instance.
4. Click the Copy button.
5. Next, select the instance you want to copy to using the Target Instance dropdown menu.

NOTE: The target instance must be a Sandbox or Preview instance; Production instances cannot be selected.

There are two types of copy methods: full copy and minimal copy. Full copy will copy customizations and data. Minimal copy will only copy customizations.

WARNING: In both cases, the copied data will overwrite some or all of your target instance. Once you perform the copy, you will not be able to recover any overwritten data.

6. Select the Copy Type.

Before performing the copy operation, you may also edit general settings and/or security settings as needed.

7. When you are ready to perform the copy operation, click the Copy button.
8. Click Yes in the confirmation dialog box.

After you confirm the copy, the operation will take some time to complete depending on the amount of data you have.

4.3.1 Full Copy

A full copy includes all application data, users, and customizations from the source instance and is suitable for:

- User acceptance testing
- Upgrade testing
- Preview in production (TAP/EA)
- Training

4.3.2 Minimal Copy

A Minimal copy only includes users, customizations, and schema from the source instance and is suitable for:

- Iterative team development

- Partner/ISV solutions
- Proof of concept