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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 Rental Life solution into CRM instance (Dynamics 365, v 9.1.0.7625)
- 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 in Dynamics 365](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.
3. Solution Import

3.1 Import of 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 development language. For example: if your system development language is English, it must be set as in the screenshots below.

2. Select Rental Life .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):
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 screen](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.

![Importing customizations](image)
7. Download Log File button will provide more information about import and imported components. Close, and publish changes.
### 3.2 Switch language (for logged in user)

1. Go to Settings button on upper right corner and select Options

![Options Menu](image)

2. Go to tab Languages, and switch User Interface to desired language

![Language Settings](image)

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 Bookaing Status

Base data needs to be created manually to have additional booking status 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>

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 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 vide, the custom button added “Create Invocies for all Orders” that will generate invocie in bulk for all elegable 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 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)
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 “Rental Manager” security role will be able to create/update/delete 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 “Rental Person” security role will be able to create/update the all the master (Subject, Products, Cost/Offerings, Deprecation, Price List) and create/update/delete all daily records (Lead, Opportunity, Quote, Order, Invoice, Repair) into system.

5.1.3 RLFS - Service Person

User with “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
Security

Which feature would you like to work with?

Users
Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.

Security Roles
Create new security roles. Manage and delete existing security roles for your organization.

Field Security Profiles
Manage user and team permissions to read, create, or write information in secured fields.

Positions
Add new Position. Modify the Position description.
2. Select user, and click assign roles

3. Select one or more Rental Life roles and save
6. Templates

6.1 Template Types

Document templates available for RentalLife solution are:

1. Quote Rental Business
2. Order Rental Business
3. 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.