



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

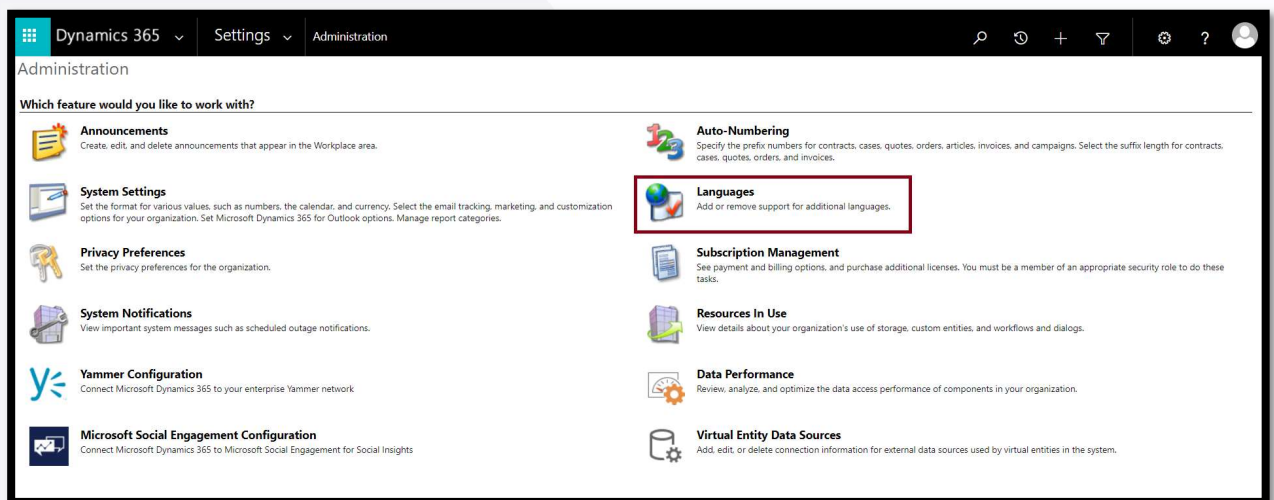
- Prerequisites configuration (Language)
- Steps to import Rental Life solution into CRM instance (Dynamics 365, v 9.1.0.7625)
- Field Service (8.8.1.45)
- Security roles and their privileges

2. Additional Languages

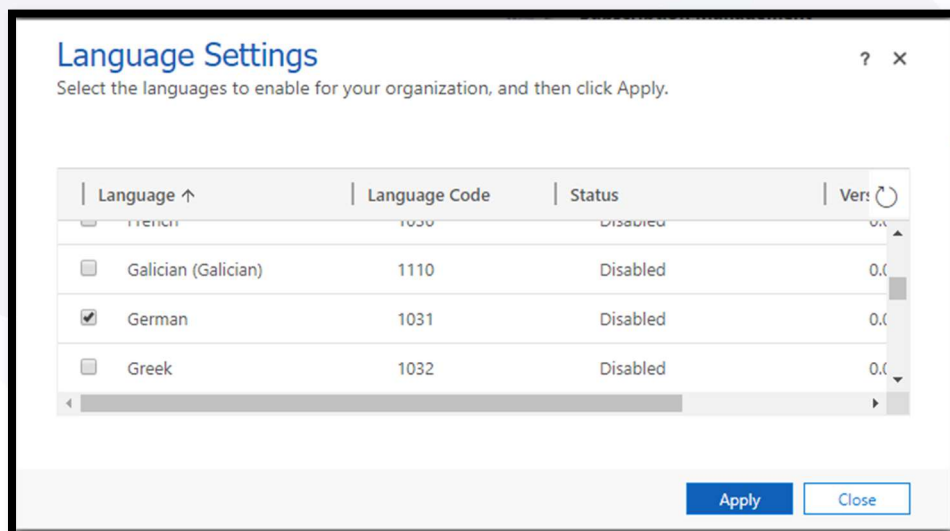
RentalLife is supported in English and German language. English is base language, and solution will be in English by default. If organization wants to be able to use Rental Life it in German, German languages need to be installed before importing solution.

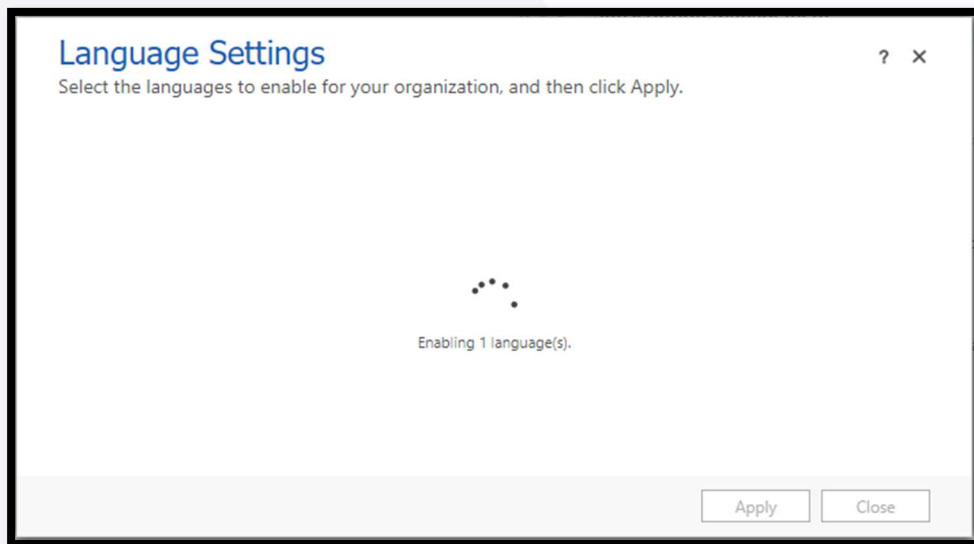
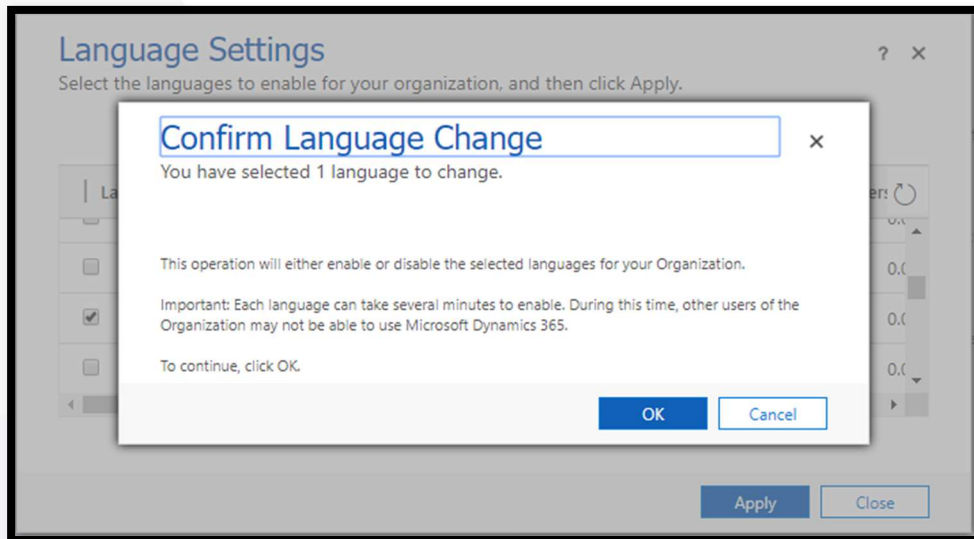
Check if desired language is already installed:

1. Go to Settings > Administration > Languages



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.

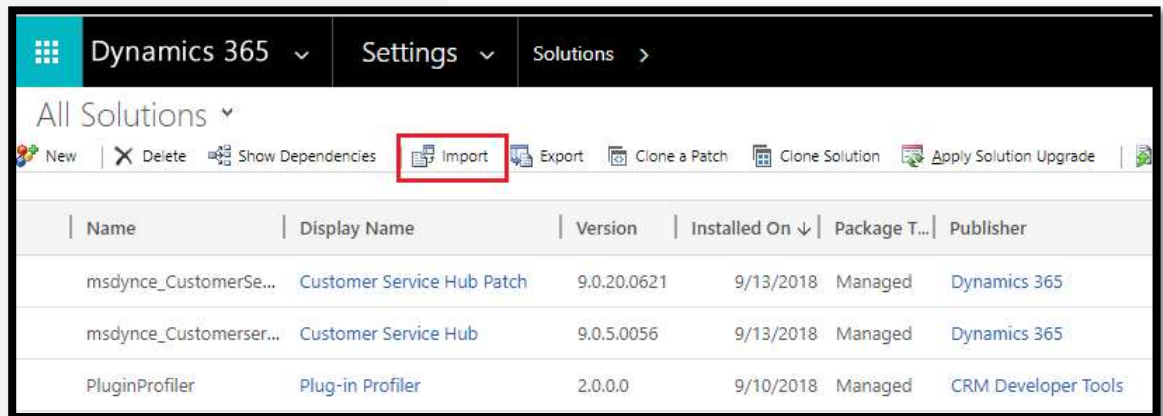




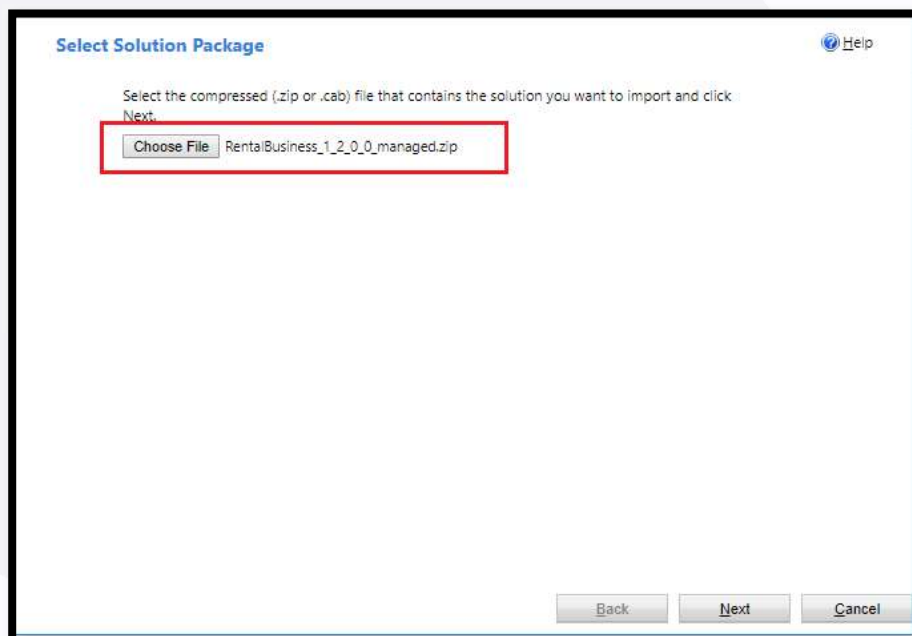
3. Solution Import

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



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

Solution Information

Name: Rental Life
 Publisher: CRM Partners AG(crmpartnersag)
 Package Type: Managed

[View solution package details](#)

By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).

Back Next Cancel

- 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			

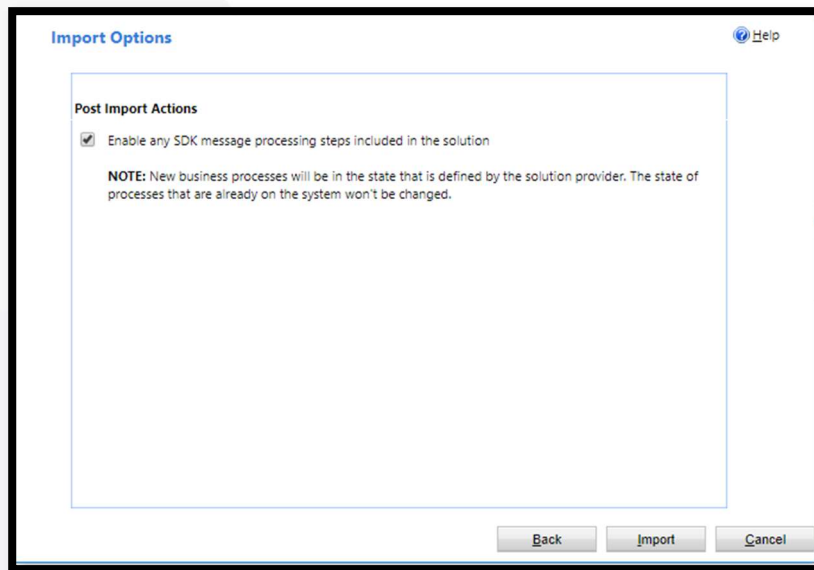
Solution Components

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	

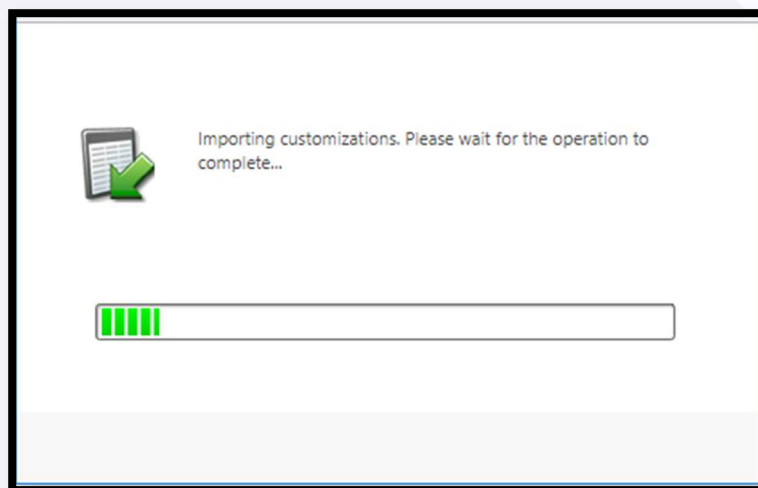
Page 1

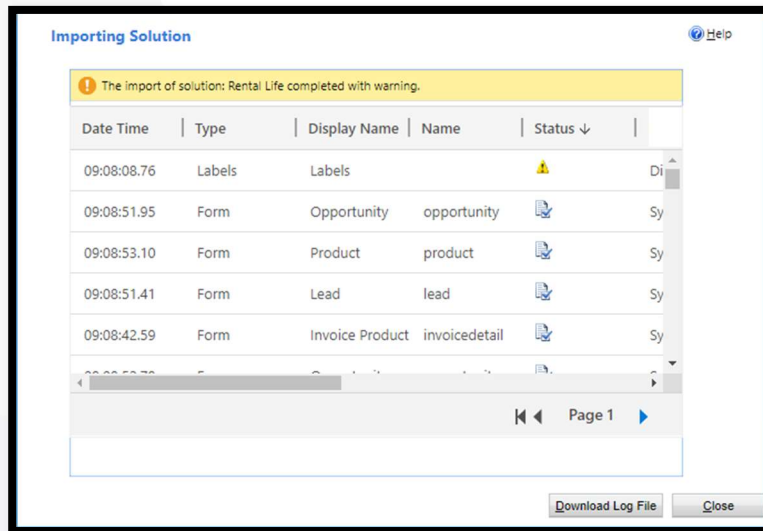
Close

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.

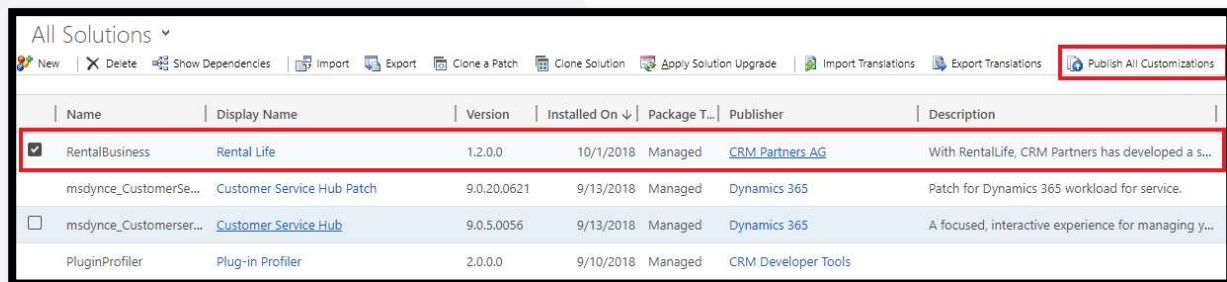


6. Import process starts and when done, message about successful import appears.
Note: Message might say that import was successful, but with warnings. This will happen if German language is not installed on the instance.



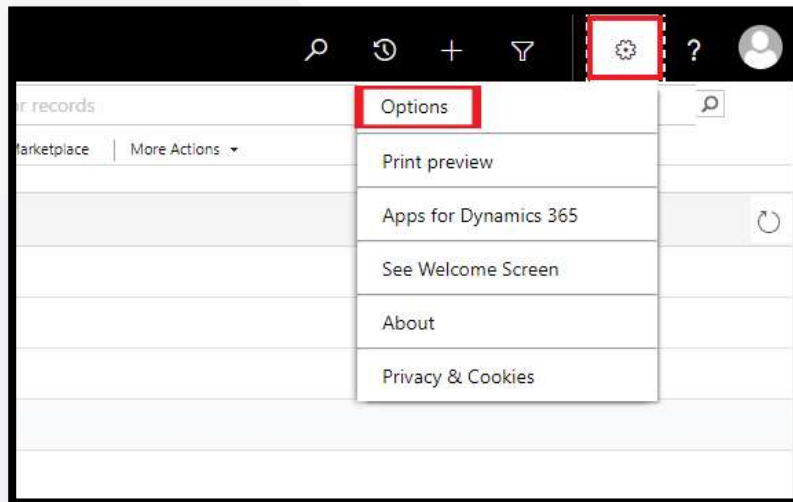


- Download Log File button will provide more information about import and imported components. Close, and publish changes.

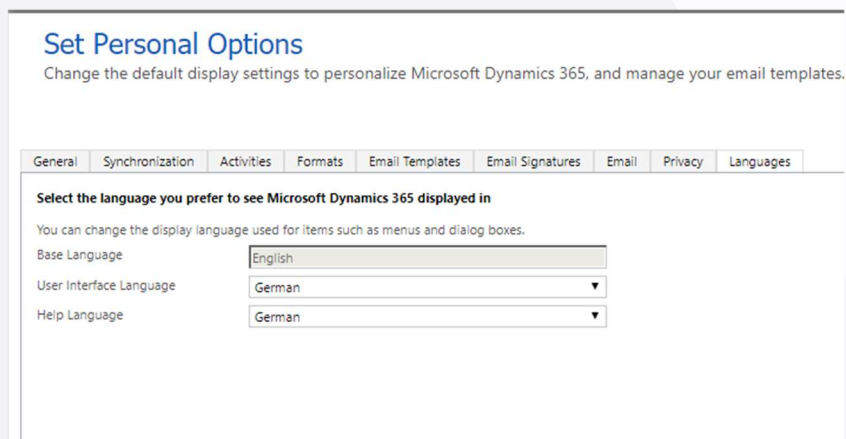


3.2 Switch language (for logged in user)

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



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 Bookaing Status

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

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

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

Availabe options are

- All in one go
Each invoice needs to be created manually
- Event Driven
On order vide, the custom button added "Create Invocie 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 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

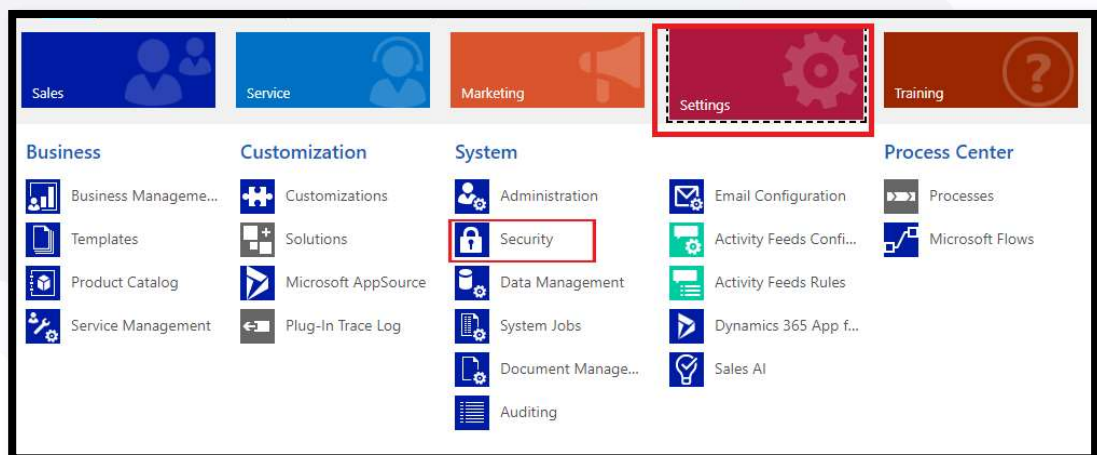
User with “RLFS–Sales Person” security role will be able to read the all the master (Subject, Products, Cost/Offerings, Deprecation, Price List) and create/update all daily records (Lead, Opportunity, Quote, Order, Invoice) and create maintenance task (Repair) into system.

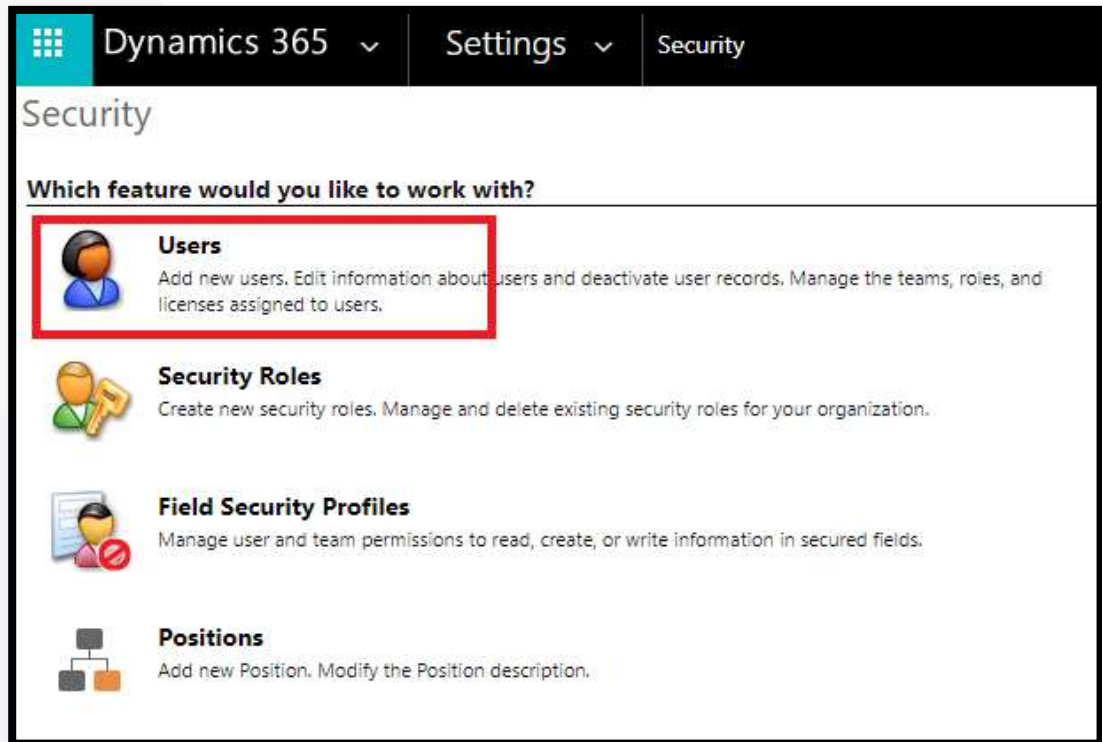
5.1.3 RLFS–Service Engineer

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.

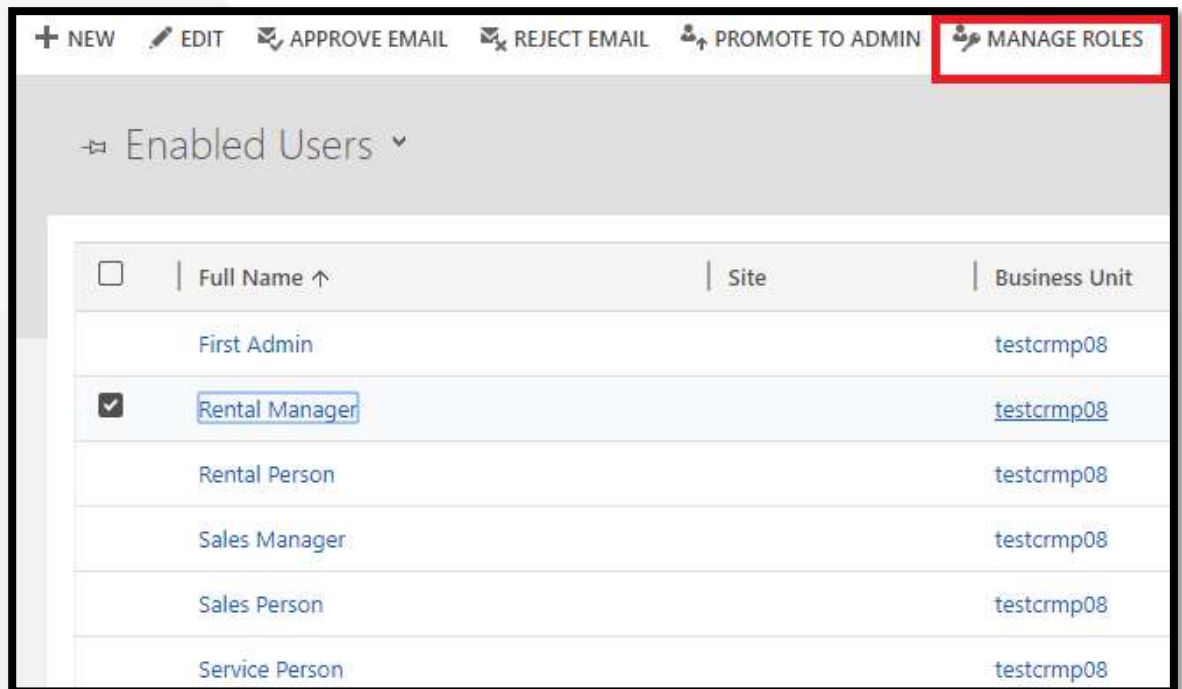
5.2 Assign security roles to users

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

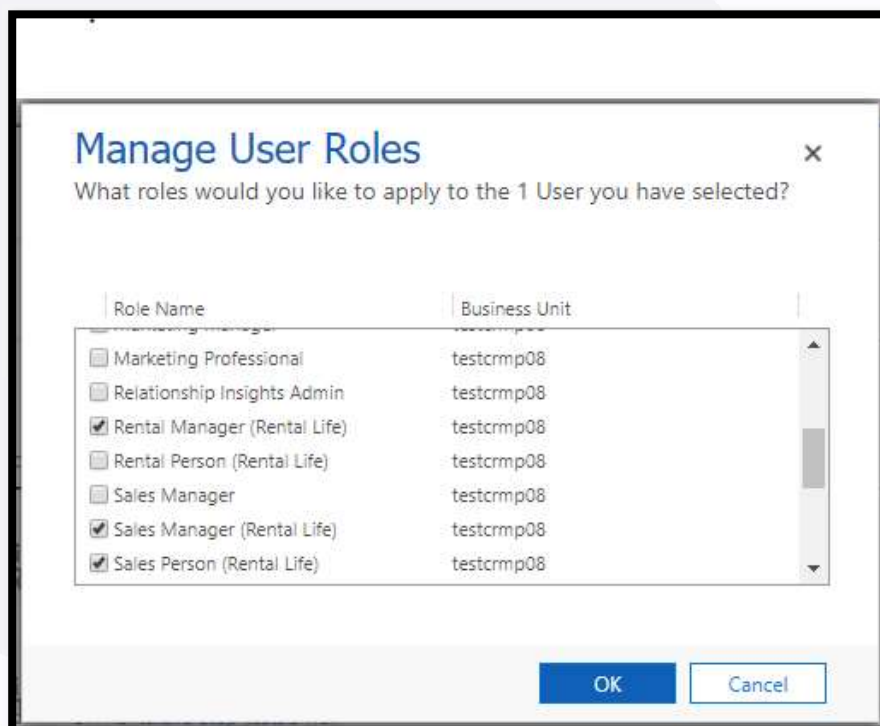




2. Select user, and click assign roles

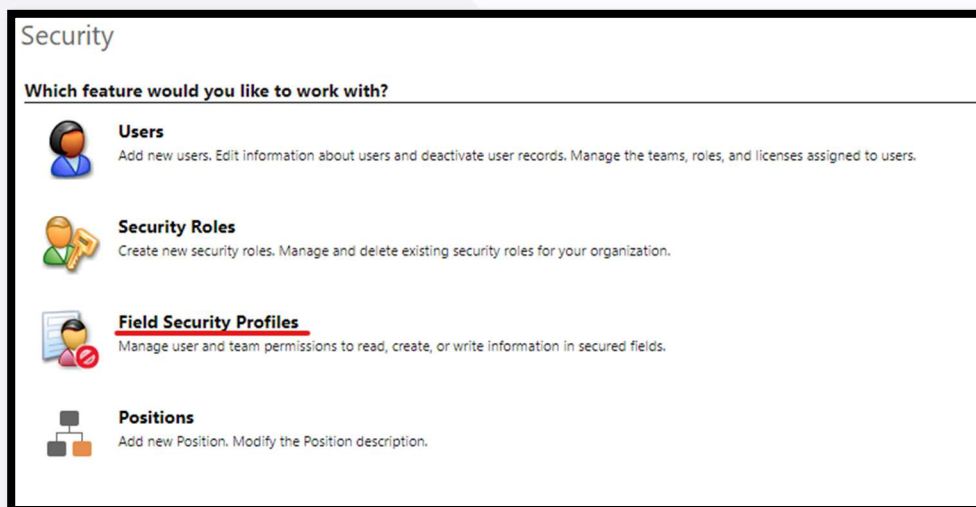
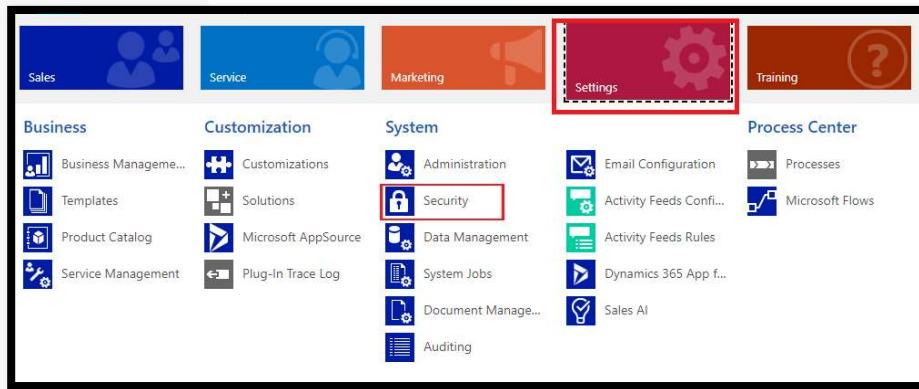


3. Select one or more Rental Life roles and save

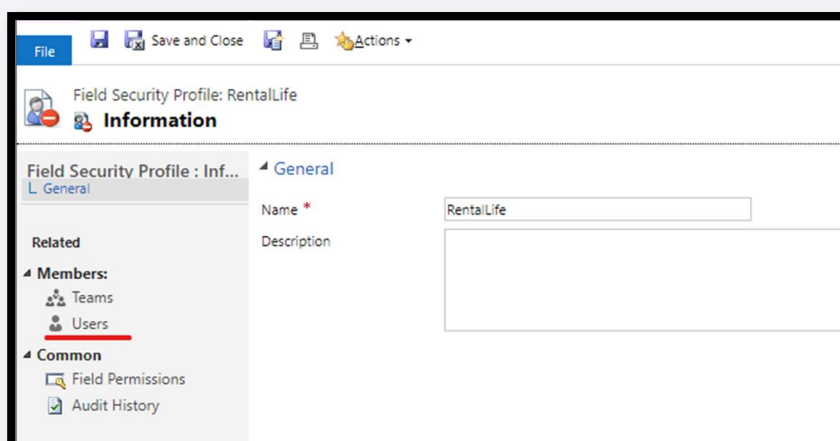


5.3 Assign Security Profile


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




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








4. Add required users to profile


Field Security Profile: RentalLife


Users

Field Security Profile : Inf...
[General](#)




Users
User Associated View


Add



More Actions



Full Name ↑	Business Unit...	Title	Status

Related

Members:

-  Teams
-  Users

Common

-  Field Permissions
-  Audit History

6. Templates

6.1 Template Types

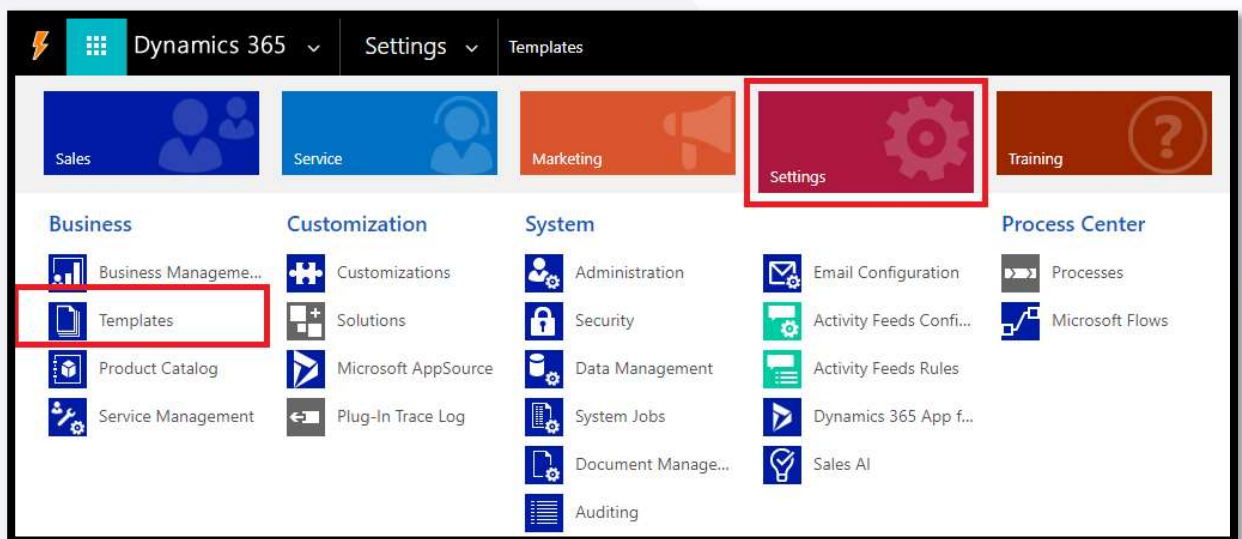
Document templates available for RentalLife solution are:

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

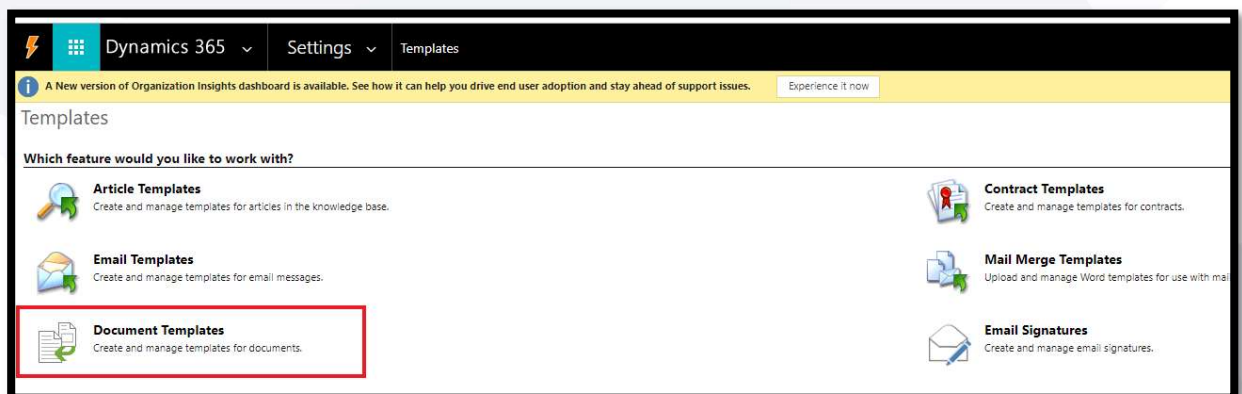
These templates will be used to generate quotes, orders and invoices based on information in CRM provided for Rental management.

6.2 Add templates to CRM

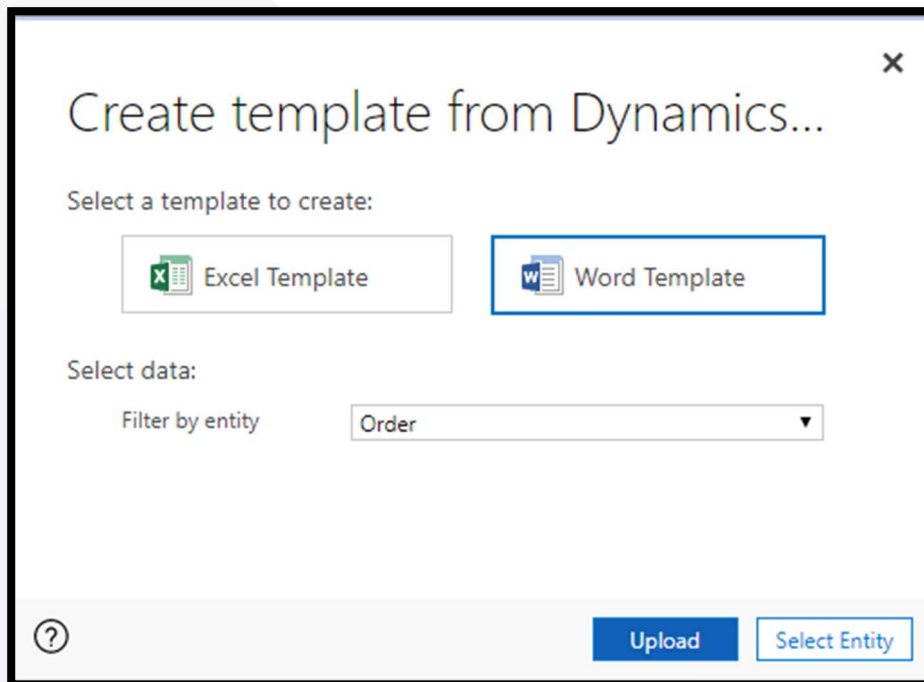
1. Go to Settings > Templates



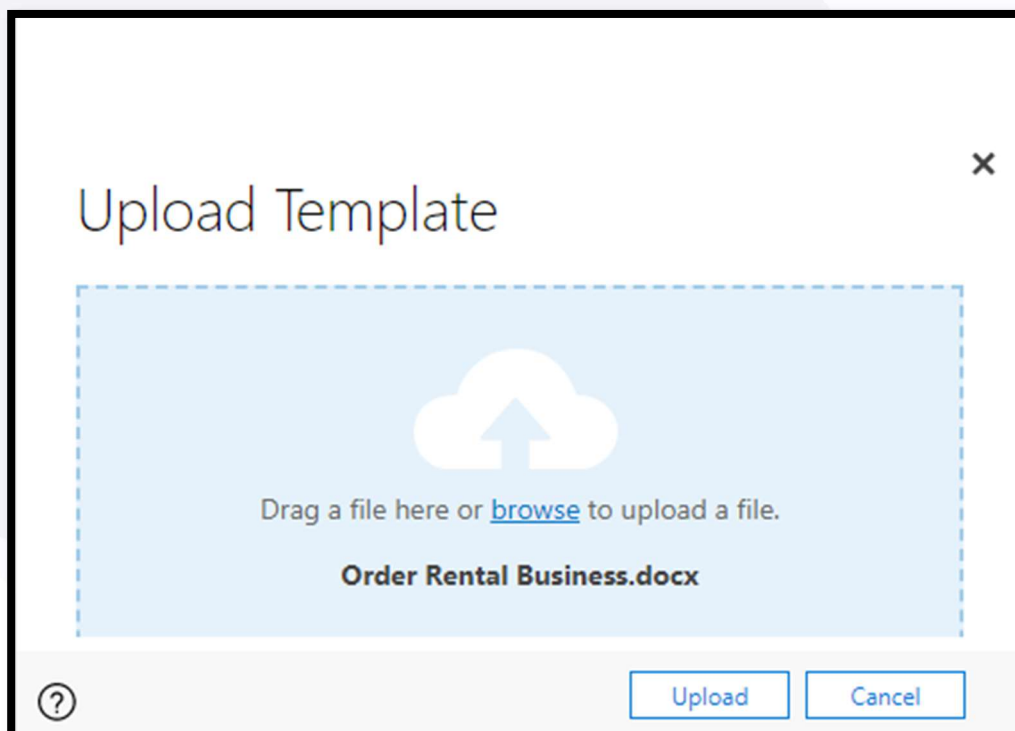
2. Click on Document Template



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.



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

The screenshot shows the Dynamics 365 interface for the RentalLife Step tests process. The top navigation bar includes 'Dynamics 365', 'Sales', 'Quotes', and 'RentalLife Step tests'. A dropdown menu for 'QUOTE: RENTAL BUSINESS' is open, showing options like 'Start Dialog', 'Flow', 'Word Templates', 'Run Report', and 'Form Editor'. The 'Word Templates' option is highlighted, and a sub-menu is open showing 'Create Word Template', 'Word Templates', 'Angebotszusammenfassu...', and 'Quote Rental Business'. The 'Quote Rental Business' option is highlighted. The main content area shows the 'Summary' tab with fields for Quote ID, Revision ID, Name, Currency, and Price List. The 'PRODUCTS' table lists two items: 'Laptop' with product name 'WWI Laptop12 M0120', dates '01/Nov/18' to '10/Nov/18', duration '10', quantity '2.00000', and cost per day '\$5.00'. The 'SHIPPING INFORMATION' section shows a 'Detail Amount' of '\$239.60' and a 'Pre-Freight Amount' of '\$239.60'.

Subject	Product Name	Date From	Date To	Duration	Quantity	Cost Per Day
Laptop	WWI Laptop12 M0120	01/Nov/18	10/Nov/18	10	2.00000	\$5.00
Laptop	WWI Laptop12 M0120	01/Nov/18	10/Nov/18	10	2.00000	\$5.00

SHIPPING INFORMATION	Detail Amount	Pre-Freight Amount
	\$239.60	\$239.60