



## ACHIEVE EQUIPMENT RENTAL

USER MANUAL  
Version 6.5

PRESENTED BY  
ACHIEVE IT SOLUTIONS



**SAP**<sup>®</sup> Certified  
SAP Business One Integration



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## ACHIEVE EQUIPMENT RENTAL USER GUIDE

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## Rental Setup

To configure Rental Module:

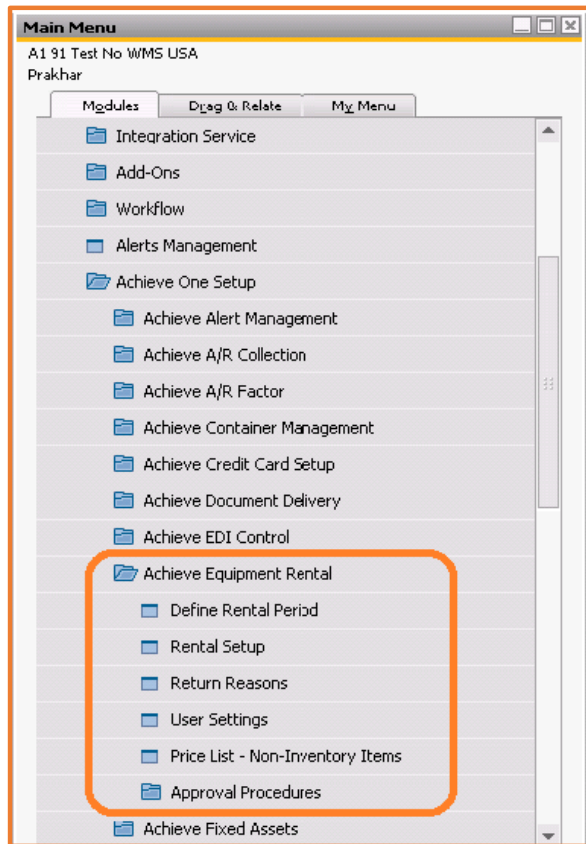
- Open SAP Business One.
- Select *Administration > Add-Ons > Add-On Manager* from the SAP Business One main menu to display the Add-On Manager screen.
- Select Achieve One add-on from the Add-Ons list.
- Click Start to start the Achieve One Add-On.
- Click OK to close the Add-On Manager screen when the Disconnected changes to Connected in the Status Column of the Add-On Manager screen.

After installing the Rental module, the following menus and fields are added in the main menu/screens:

- New Achieve One Setup menu under Administration.
- New Equipment Rental module is added in the module list of SAP Business One

The Rental menu is added under Setup folder in Administration menu. The Rental sub menu contains the following options:

- Define Rental Period
- Rental Setups
- Return Reasons
- User Settings
- Price List-Non Inventory Items
- Approval Procedures



**Figure Rental 1.1: Rental Menu**

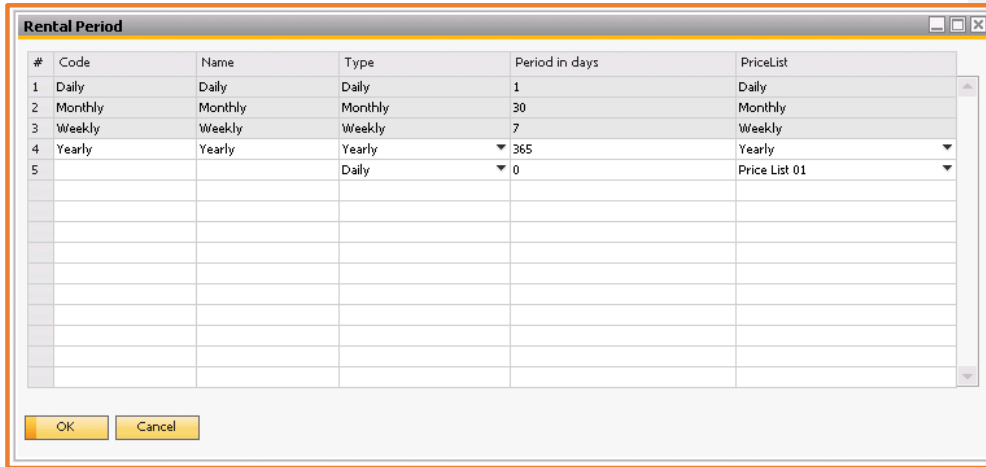
## Working with Rental Period

Select the Define Rental Period option from the Rental sub menu to open the Rental Period form. The Rental Period form facilitates the user to define the time period information of the rental cycle. The Rental Period form contains the options to define the code, name, type, period, and pricelist information of the rental. The code is used to define the billing cycle, prorate short and prorate extend information. The different price lists can be mapped with these codes to have



different prices. You can use the Rental Period form to add, modify, and view the Rental period.

The Figure Rental 1.1.1 displays the Rental Period code form:



#	Code	Name	Type	Period in days	PriceList
1	Daily	Daily	Daily	1	Daily
2	Monthly	Monthly	Monthly	30	Monthly
3	Weekly	Weekly	Weekly	7	Weekly
4	Yearly	Yearly	Yearly	365	Yearly
5			Daily	0	Price List 01

OK Cancel

**Figure Rental 1.1.1: Rental Period**

The various fields in the Rental Period form are as follows:

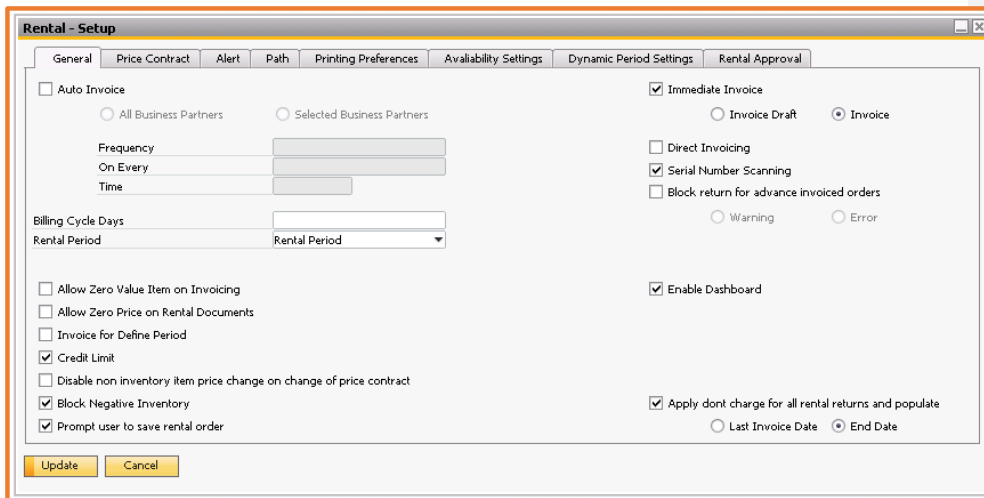
- **Code:** Displays user defined Rental Period code.
- **Name:** Displays user defined Rental Period name.
- **Type:** Displays Rental Period Unit on the basis of which rental period shall be calculated. It can have any of the following values:
  - Daily
  - Weekly
  - Monthly
  - Yearly
- **Period in days:** Displays the minimum number of days as per the Rental Period Unit.
- **Price List:** Displays the price list to be mapped with the Rental period code.

## Working with Rental Setups

The Rental Setups option helps to work with the setup information of the rental. As you select the Rental Setups option, the Rental Setups form will be displayed. The Rental Setups form is used to configure the preliminary settings for the Rental; i.e. Auto invoice configuration, Price Matrix and Alerts etc. You can use the Rental Setups form to add, modify, and view the settings of the rental.

**Note:** Price contract code cannot be modified if it is being used.

The Rental Setups is used to configure the basic settings applicable on Achieve Rental transactions. It consists of five tabs, namely General, Pricing, Alert, Path and Printing Preferences to perform rental settings. The Rental Setups form is displayed, as shown in the Figure Rental 1.2.1:



**Rental - Setup**

General | Price Contract | Alert | Path | Printing Preferences | Availability Settings | Dynamic Period Settings | Rental Approval

Auto Invoice

All Business Partners     Selected Business Partners

Frequency:

On Every:

Time:

Billing Cycle Days:

Rental Period:  Rental Period

Allow Zero Value Item on Invoicing

Allow Zero Price on Rental Documents

Invoice for Define Period

Credit Limit

Disable non inventory item price change on change of price contract

Block Negative Inventory

Prompt user to save rental order

Immediate Invoice

Invoice Draft     Invoice

Direct Invoicing

Serial Number Scanning

Block return for advance invoiced orders

Warning     Error

Enable Dashboard

Apply dont charge for all rental returns and populate

Last Invoice Date     End Date

**Figure Rental 1.2.1: Rental Setup– General Tab**

Let's discuss the different types of Rental Setup form in detail.

## Defining the General Tab

The General Tab helps to define the overall information of the rental settings. As you open the Rental Setups screen the General Tab is selected, by default. Figure Rental 1.3.1 displays the General tab information.

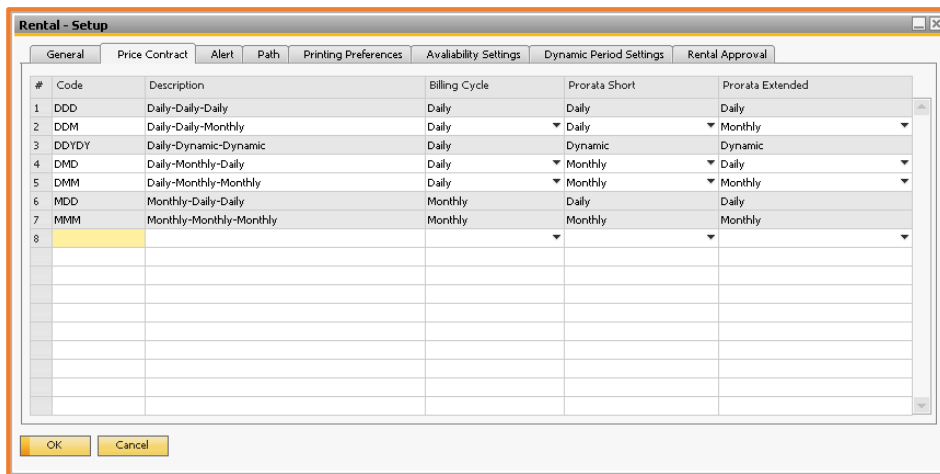
The various options available in the General tab are as follows:

- **Auto Invoice:** Enable the auto invoicing service which will generate invoice of all the pending orders on the basis of the configuration defined by setting following fields.
- **All Business Partners/Selected Business Partners:** Defines whether the invoicing to be done for all business partner's pending order or just the selected business partners for which Auto Invoicing UDF is set to yes on Business Partner Master screen.
- **Frequency:** Defines how periodically auto invoicing service needs to be run to generate Invoices of pending orders. It can have any of the following values: daily, weekly or monthly.
- **On Every:** Defines day of the month/week on which service should run depending on the frequency chosen.
- **Time:** Defines the time at which the service should run.
- **Billing Cycle Days:** Defines the fixed number of days after which an order should be made available for invoicing.
- **Rental Period:** Defines on what dates the rental period should get calculated on Rental Quotation/Rental Order. It can have any of following two values:
  - **Rental Period:** Defines that period of rent on Rental Order/ Rental Quotation should be calculated on basis of Start date and End date of the document.
  - **Shipment Period:** Defines that period of rent on Rental Order/ Rental Quotation should be calculated on basis of Shipping Date and Return Date of the document.
- **Allow Zero Value Item on Invoicing:** Defines whether the item with zero prices should be allowed to get invoiced.

- **Allow Zero Price on Rental Documents:** Defines whether the item with zero prices should be allowed on Rental Order and Rental Quotation.
- **Invoice for Defined Period:** Helps to select whether the defined period of the rental should be invoiced.
- **Credit Limit:** Displays the prompt about the credit limit of the BP in the rental.
- **Disable non inventory item price change on change of price contract:** If checked, price of non-inventory items will not be changed on change of Price Contract.
- **Block Negative Inventory:** If checked, it will block negative inventory on rental documents.
- **Prompt User to Save Rental Order:** If checked, it will prompt user before saving Rental Order.
- **Immediate Invoice:** This feature allows user to create Immediate Invoice while adding Rental Order.
- User can select Invoicing mode under this field which can be either of these two:
  - **Invoice Draft:** If checked, it will enable creating Rental Invoice Draft instead of Rental Invoice.
  - **Invoice:** If checked, it will enable creating Rental Invoice directly.
- **Direct Invoice:** If checked, it will enable creating Rental Invoice directly instead of creating Rental Invoice Draft.
- **Serial Number Scanning:** If checked, it will enable serial number scanning on Rental Order/Rental Return processes.
- **Block return for advance invoiced orders:** Blocks rental return when advanced invoice is generated for the Rental Order if checked.
  - **Warning:** Gives warning to the user if selected, and ask confirmation to save.
  - **Error:** Gives error if selected.
- **Enable Dashboard:** If checked, it will enable the dashboard.
- **Apply don't charge for all rental returns and populate:** If enabled, don't charge option on the rental return would be automatically selected on returning the items also it would automatically populate date in the don't charge after field base on the following settings:
  - **Last Invoice Date:** Last invoice date of the line item.
  - **End Date:** End date of the line item.

## Defining the Pricing Tab

The Pricing tab (Figure Rental-1.4.1) enables you to define the pricing information of the rental setup. The rental pricing is required in order to compute the Invoice amount on the Rental Order/Rental Quotation.



#	Code	Description	Billing Cycle	Prorata Short	Prorata Extended
1	DDD	Daily-Daily-Daily	Daily	Daily	Daily
2	DDM	Daily-Daily-Monthly	Daily	▼ Daily	▼ Monthly
3	DDYDY	Daily-Dynamic-Dynamic	Daily	Dynamic	Dynamic
4	DMD	Daily-Monthly-Daily	Daily	▼ Monthly	▼ Daily
5	DMM	Daily-Monthly-Monthly	Daily	▼ Monthly	▼ Monthly
6	MDD	Monthly-Daily-Daily	Monthly	Daily	Daily
7	MMM	Monthly-Monthly-Monthly	Monthly	Monthly	Monthly
8				▼	▼

**Figure Rental 1.4.1: Rental Setups – Pricing Tab**

The Pricing tab contains the following options to define the pricing information of the rental setup:

- **Code:** Displays user defined Price Matrix Code.
- **Description:** Displays the description of Price Matrix Code.
- **Billing Cycle:** Displays the Rental period to be selected for Invoice amount calculations for given rental period.
- **Pro-rata Short:** Displays the Rental period selected for Invoice amount calculations if the Rental Item is returned before the rental period ends.

- **Pro-rata Extend:** Displays the Rental period to be selected for Invoice amount calculations if period to be invoiced exceeds the actual rental period.
- **Dynamic (Prorata Extended):** Selecting this value in “Prorata Extended” column, dynamically calculates Rental Invoice for extended period based on the bifurcation of the Rental Period.
- **Dynamic (Prorata Short):** Selecting this value in “Prorata Short” column, dynamically calculates Rental Invoice for short period based on the bifurcation of the Rental Period.

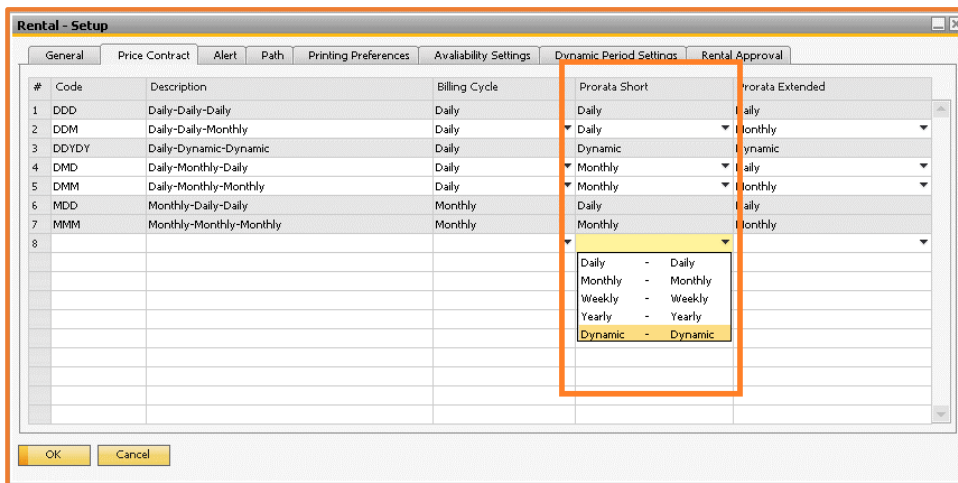
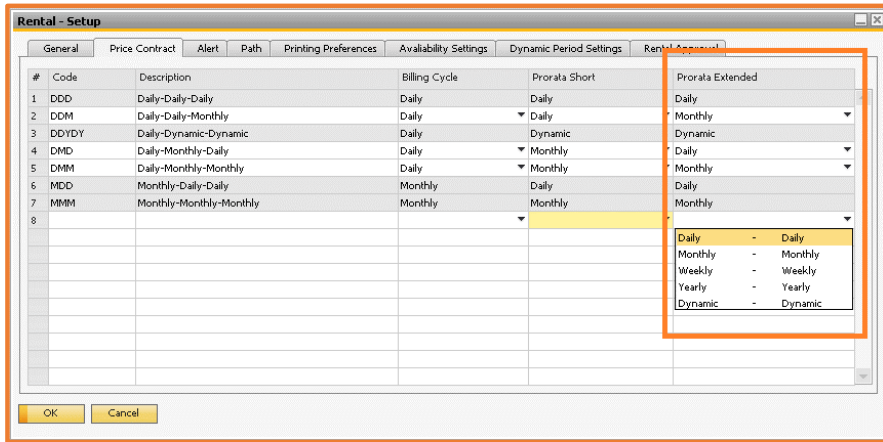


Figure Rental 1.4.2: Rental Setups – Pricing Tab

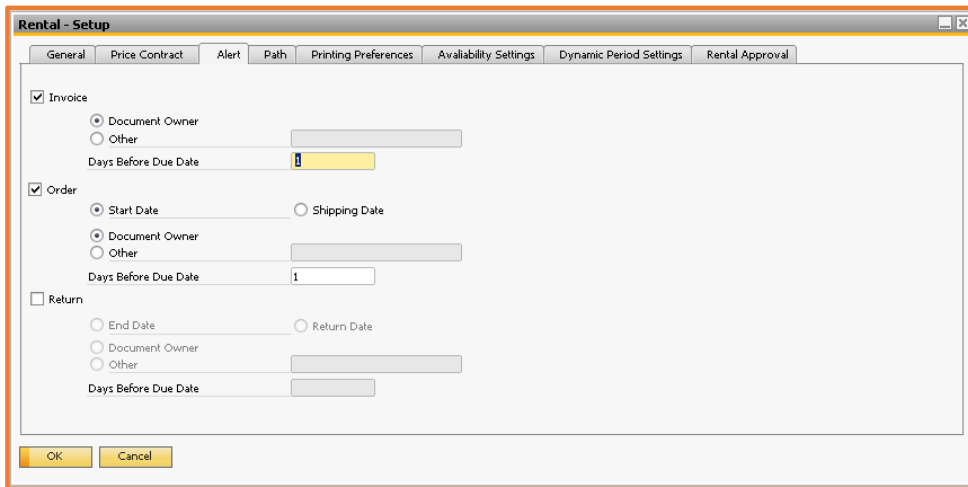


**Figure Rental 1.4.3: Rental Setups – Pricing Tab**

### Defining the Alert Tab

The Alert tab (Figure Rental 1.5.1) is used to configure the alerts for the following Achieve One Rental documents:

- Rental Invoice.
- Rental Order.
- Rental Return.



**Figure Rental 1.5.1: Rental Setup – Alert Tab**

The Alert tab contains the following options:

- **Invoice:** Select to generate alerts for invoice to be generated on the basis of configuration of following fields:
  - **Document Owner:** Select if an alert needs to be send to Document Owner.
  - **Other:** Select Sales Employee to whom alert needs to be sent.
- **Days Before Due Date:** Displays number of days before the due date when the alert needs to be generated.
- **Order:** Select to generate an alerts for an order to be processed on the basis of configuration of following fields:
  - **Start Date/Shipping Date:** Select the date to be considered as due date.
  - **Document Owner:** Select if an alert needs to be sent to Document Owner.
  - **Other:** Select Sales Employee to which an alert needs to be sent.
- **Days Before Due Date:** Displays number of days before the due date when the alert needs to be generated.

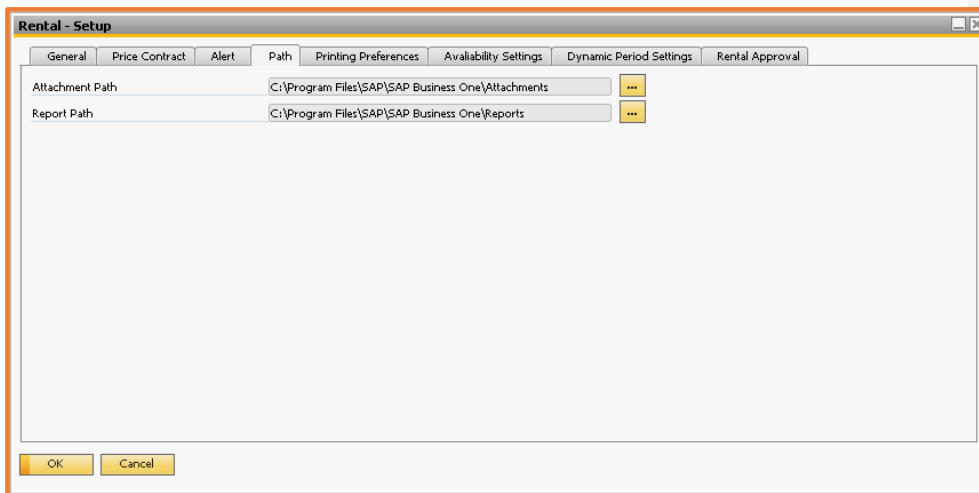


- **Return:** Select to generate an alerts for Rental Return to be created on the basis of configuration of following fields:
  - **End Date/Return Date:** Select the date to be considered as due date.
  - **Document Owner:** Select if an alert needs to be send to Document Owner.
  - **Other:** Select Sales Employee to which an alert needs to be sent.
- **Days Before Due Date:** Displays number of days before the due date when the alert needs to be generated.

Let's learn about the Path tab.

### Defining the Path Tab

Use this tab to define paths to the folders where you want to store various files, reports, and information; such as images and attachments.



**Figure Rental 1.6.1: Rental Setup – Path Tab**


The Alert tab contains the following options:

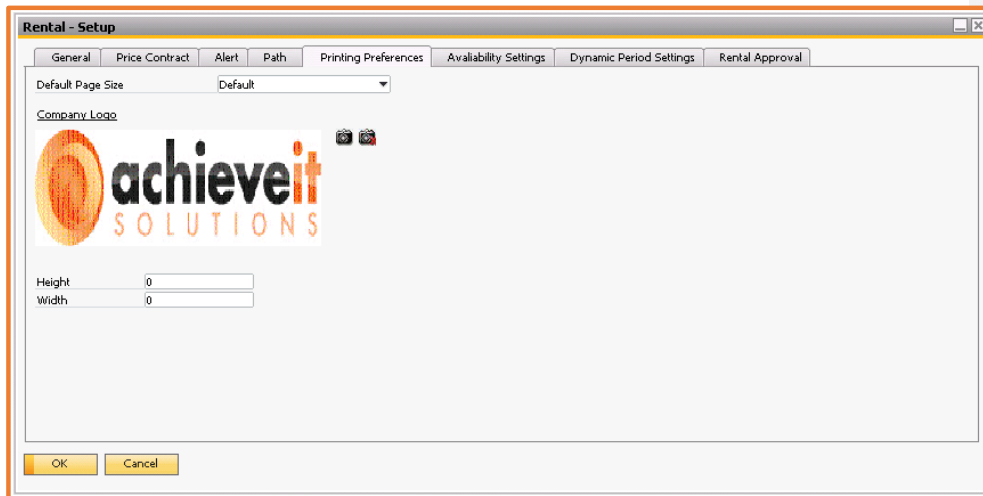
- **Attachment Path:** Select the directory where you want to store attachments, such as customer Web pages, for integration through user fields. When updated, this setting is updated per company, for all users.
- **Report Path:** Select the directory where you want to store the reports used in Achieve One Rental. When updated, this setting is updated per company, for all users.

### Defining the Printing Preference Tab

Use this window to define the default settings for reports printing in Achieve One Rental.'

The Printing Preference tab contains the following options:

- **Default Page Size:** Specify the default page size for Achieve One Rental reports.
- **Company Logo:** Set company logo to display on Achieve One Rental reports. The two icons  given adjacent to the logo tab, are used to add and remove the company logo from the page.
- **Height:** Enter the height of the company logo.
- **Width:** Enter the width of the company logo.



**Figure Rental 1.7.1: Rental Setup – Printing Preference Tab**

### Availability Settings Tab

Use this window to define the default settings for rental availability report.

The Availability Settings tab contains the following options:

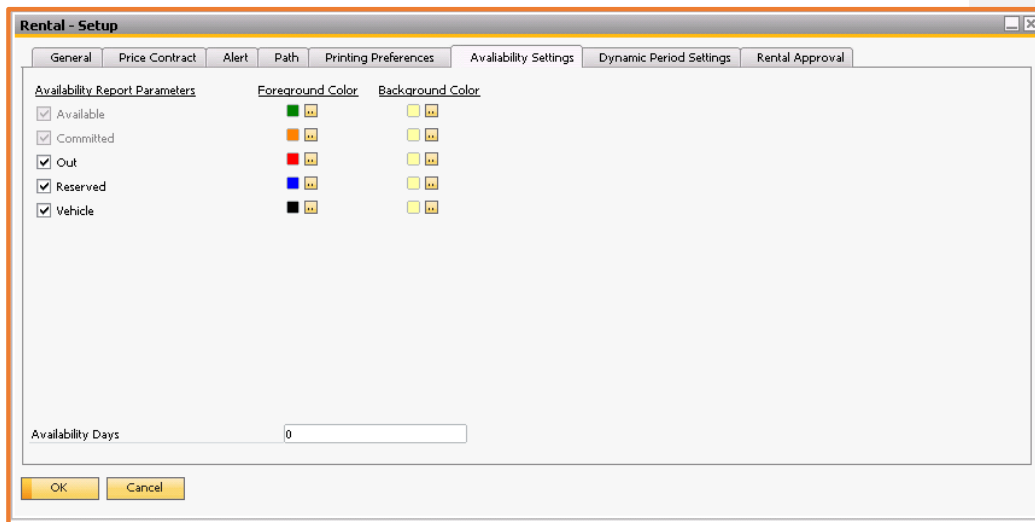
- **Availability Report Parameters:** This feature allows user to define the availability report status of the Rental Order.

The availability state of the report can be either of these five:

- **Available:** If checked, it will show the number of items available in the stock.
- **Committed:** If checked, it will show the number of items committed on the Rental Orders.
- **Out:** If checked, it will show the number of items which are rented.
- **Reserved:** If checked, it will show the number of items reserved on rental quotations.
- **Vehicle:** If checked, it will show the number of items which are on the vehicle.

- **Availability Days:** Specify the default days to be displayed in the rental availability report.

**Note:** Use foreground and background color for the availability parameter to set the color.



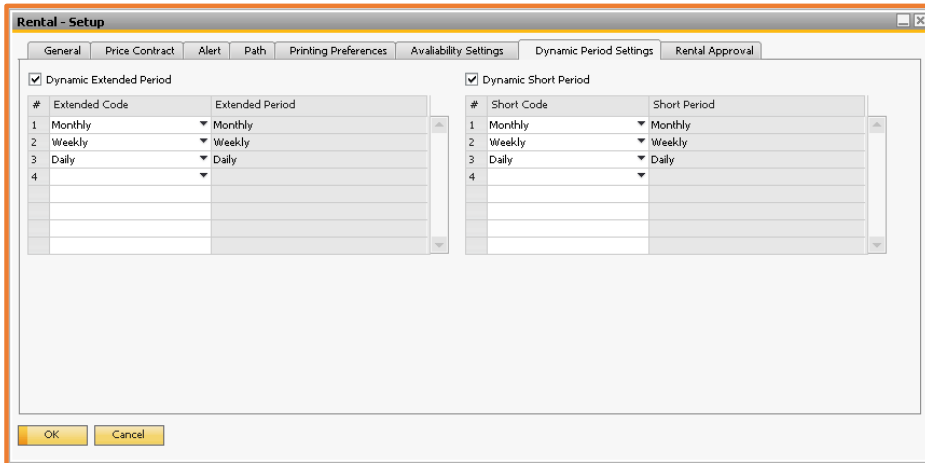
**Figure Rental 1.8.1: Rental Setup – Availability Settings**

### Dynamic Period Settings Tab

Use this window to define the default settings for the dynamic period calculations.

The Dynamic Period Settings tab contains the following options:

- **Dynamic Extended Period:** This feature allows user to define hierarchy of the rental periods used in dynamic extended invoice calculations.
- **Dynamic Short Period:** This feature allows user to define hierarchy of the rental periods used in dynamic short invoice calculations.

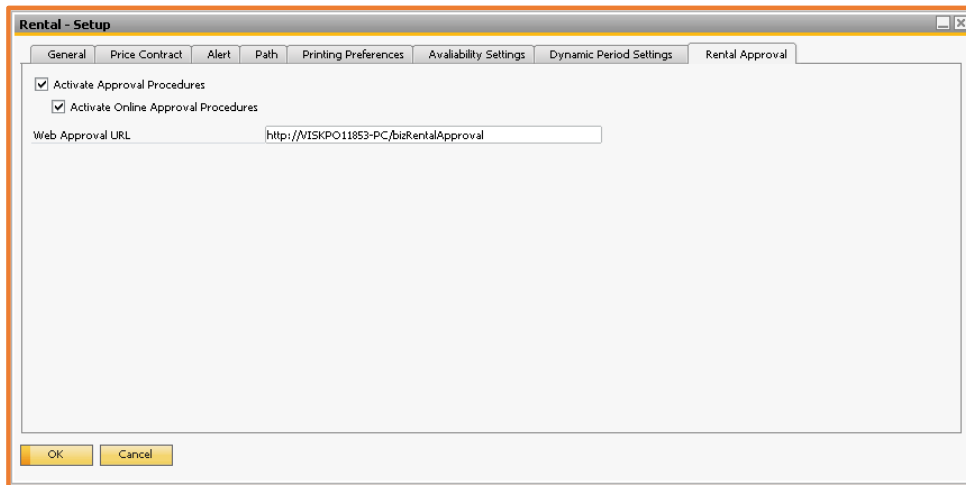


**Figure Rental 1.9.1: Rental Setup – Dynamic Period Settings**

## Rental Approval Tab

The Rental Approval Tab helps to define the settings related to rental document approvals. This tab contains following options:

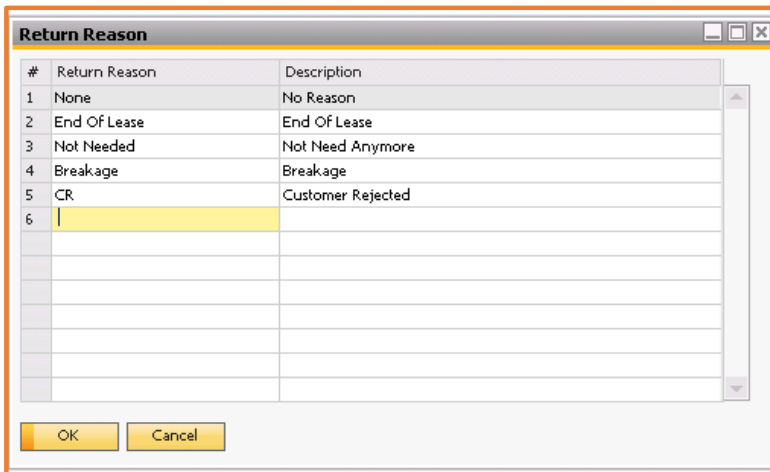
- **Activate Approval Procedures:** Activates approval procedures for rental documents.
- **Activate Online Approval Procedures:** Activates Web approvals for rental documents.
- **Web Approval URL:** Web Approval’s online path. In 6.5 versions this option has been excluded, and it will be available in next release only.



**Figure Rental 1.10.1: Rental Setup –Rental Approval**

### Working with Return Reasons

The Return Reason menu option helps to define the vehicle return reasons. The Return Reason menu opens the “Return Reason form” which allows you to add, modify, and view the return reason information. The Return Reason form (Figure Rental 1.8.1) serves the purpose to define the Return Reason for the return of a rental in the delivery management process.



#	Return Reason	Description
1	None	No Reason
2	End Of Lease	End Of Lease
3	Not Needed	Not Need Anymore
4	Breakage	Breakage
5	CR	Customer Rejected
6		

**Figure Rental 1.8.1: Return Reason**

The Return Reason form contains the following options:

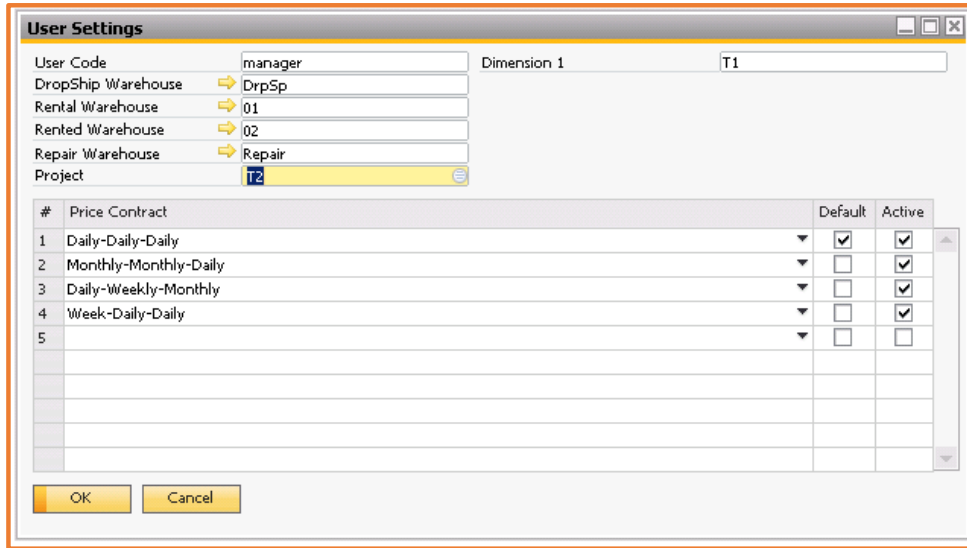
- **Return Reason:** Display the reason of returning items not delivered.
- **Description:** Display the description of the reason for return.

### Working with Rental User Settings

The Rental User settings form help to provide the common information of the specific user. The Rental User Settings form contains the information related to various users that includes drop ship warehouse, rental warehouse, rented warehouse, and price contract. The information specified in the User Settings form gets automatically included in the Rental Documents (Quotation and Order) when the user select the Business Partner for the Document option. However, the rental user settings information is editable in the Rental Documents.

**Note:** It is mandatory to specify the information in the Rental User Settings form to proceed further with the Rental Document.

The User Settings menu option opens the Rental User Settings form, as shown in Figure Rental 1.9.1:



#	Price Contract	Default	Active
1	Daily-Daily-Daily	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Monthly-Monthly-Daily	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Daily-Weekly-Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	Week-Daily-Daily	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5		<input type="checkbox"/>	<input type="checkbox"/>

**Figure Rental 1.11.1: Rental User Settings**

The various fields in the Rental User Settings form are as follows:

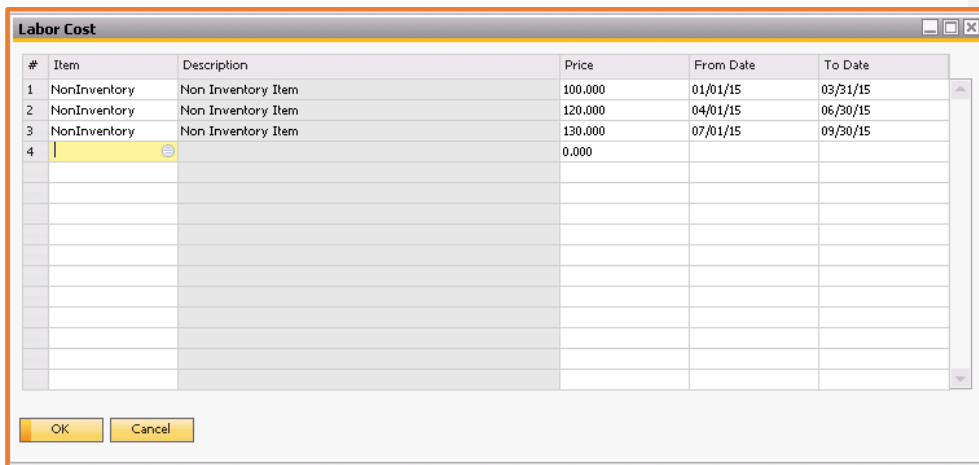
- **User Code:** Helps to specify the alphanumeric code to uniquely identify a user.
- **Dropship Warehouse:** Represents the name of the warehouse where the goods returned from the customer needs to be stored.
- **Rental Warehouse:** Used to set the default rental warehouse for the rental documents.
- **Rented Warehouse:** Used to set the default rented warehouse for the rental documents.
- **Repair Warehouse:** Used to set the default repair warehouse for the rental documents.
- **Project:** To set the assigned projects for the rental documents.
- **Price Contract:** Helps to specify the cost related to the rental document.
- **Default:** Specifies whether the user settings would be applied as default.



- **Active:** Lets you set the user configuration settings as active.
- **Add:** Lets you add the user settings information of the new user.
- **Cancel:** Lets you cancel the user settings information.

### Non - Inventory Item Price List

The User can setup the price list of a Non-inventory item for calculating service call expenses if the customer is not being charged for a particular service.



#	Item	Description	Price	From Date	To Date
1	NonInventory	Non Inventory Item	100.000	01/01/15	03/31/15
2	NonInventory	Non Inventory Item	120.000	04/01/15	06/30/15
3	NonInventory	Non Inventory Item	130.000	07/01/15	09/30/15
4			0.000		

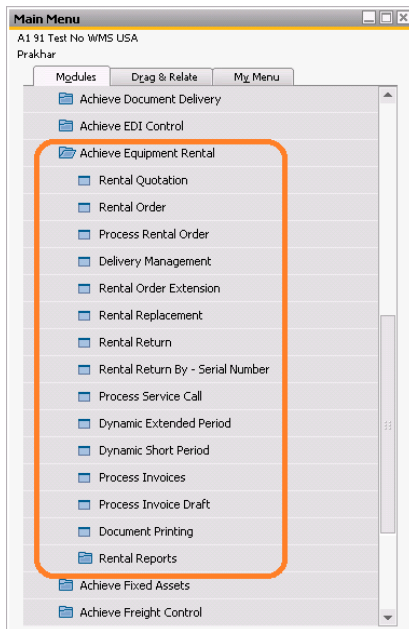
**Figure Rental 1.12.1: Rental User Settings**

### Rental Process

In the SAP Business One, the new Rental Main Menu (Figure Rental-2.1) is added to the main menu list. The Rental main menu contains the following sub menus:

- Rental Quotation.
- Rental Order.

- Process Rental Order.
- Delivery Management.
- Rental Order Extension.
- Replacement.
- Rental Return.
- Rental Return By – Serial Number.
- Process Service Call.
- Dynamic Extended Period.
- Dynamic Short Period.
- Process Invoices.
- Process Invoice Draft.
- Document Printing.
- Rental Reports.



**Figure Rental 2.1: Rental Processes Menu**

## Sub-menus

### Working with Rental Quotation

The Rental quotation document is an offer or proposal that you send either to a customer, or to a lead. The rental quotation is not a legally binding document. It is generally used for information purposes only, and can be the first link in the sales process chain. The Rental Quotation menu option helps to opens the Rental Quotation form. The Rental Quotation form helps to add, view, and cancel the rental quotation. It consists of a general area and three tabs: Contents, Logistics and Accounting, which help in preparing a rental quotation. Figure Rental 2.1.1 displays the Rental Quotation form:

#	Price Contract	Item No.	Item Description	Start Date	End Date	Shipping Date	Return Date	Rental Who	Rental Period	Available Qty	Required Qty	Open Qty	Rental Price	Discount %	Start Time	Tax Code	No of Hours	Total Am...
1		Daily-Daily-D		11/10/15		11/10/15												

Figure Rental 2.1.1: Rental Quotation – Contents tab

## Rental Quotation Form

### Defining the General Area Options:



- **Customer:** Displays the customer number as defined in the Business Partner Master Data.
- **Name:** Displays the name of the customer as defined in the Business Partner Master Data.
- **Contact Person:** Name of the default contact person as defined in the Business Partner Master Data. If required, enter a different contact person.
- **Phone:** Phone Number of the default / selected contact person.
- **Start Date:** Enter the expected start date of the rental period. By default this is the current date.
- **Shipping Date:** Enter the expected shipment date of the items. By default, this is the current date.
- **Customer Ref. No:** Represents the unique number to refer to the customer.
- **Price Contract:** Enter the pricing policy that will be applicable for the rental item on this quotation.
- **Document No:** Number of the rental quotation. The number is automatically assigned by the system.
- **Status:** Displays the status of the rental quotation. It can either be quotation, reserved, closed or cancelled.
- **Posting Date:** Enter the posting date. The default value for this field is the current date on which the quotation is created.
- **Valid Until:** Enter the date for which the rental quotation would be valid. The default value for this field is one month from the posting date.
- **End Date:** Enter the expected end date of the rental period.
- **Return Date:** Enter the expected date of return of shipment. By default, this is the End Date.
- **Rented Warehouse:** Enter the warehouse to which stock should be transferred from rental warehouse. By default, it picks up the warehouse mapped to the location of the document owner. It can be changed, if required.
- **Rental Warehouse:** Select rental warehouse (Warehouse from which Inventory shall be moved out). This will be the default Rental warehouse selection consecutive line item.

- **Dropship Warehouse:** Used to put the items at the time of shipping of goods. It's a virtual warehouse, which virtually shows the goods transfer to the customer. On transfer of items in this warehouse, items do not actually transfer from the warehouse in which they are stored.
- **Week Day Billing Check Box:** Enter whether customer should be billed only for weekdays as specified in SAP Business One calendar.
- **Charges on: Ship Date / Rental Date – Radio Buttons:** Enter whether the customer should be billed on shipment period or rental period.
- **Reserved:** Enter whether the rental items in the quotation should be reserved. If the check box is checked it will ask user to select the serial number for the serialized items that need to be reserved against the particular quotation.
- **Reserved:** If the reserved check box in the quotation screen is checked, the status of the quotation is changed to "Reserved", and user can reserve serials on rental quotation. When checked, reserved quantity column would be available at row level to partially reserve an item.
- **BP Currency dropdown:** Identify the currency on the basis of which price will be calculated on order. If the Business Partner currency equals the local currency, the options are *Local Currency* and *System Currency*. If the Business Partner currency is a foreign currency, the options include *BP Currency*. Your selection does not change the original currency of the document.
- **Sales Employee:** Enter the name of the sales employee, who is responsible for the rental quotation.
- **Owner:** Enter the name of the employee, who owns the rental quotation.
- **Remarks:** Enter additional information regarding rental quotation.
- **Total before Discount:** Total amount of the rental quotation before the discount for the document is calculated.
- **% Discount:** In the field, on the left, enter the percentage of discount. The field on the right displays the amount of the discount.
- **Add. Expense:** Enter / Load additional costs for the rental quotation.
- **Tax:** Tax amount for the rental quotation calculated according to the tax definitions.
- **Total:** Total amount for the rental quotation including tax, additional expenses and discounts.

- **Closed:** When the user converts an existing quotation to a Rental Order, the status of the quotation is changed to “Closed”.
- **Cancelled:** If the user right clicks on an existing quotation screen, there is a cancel option. If user selects the option, the status of the quotation is changed to “Cancelled”.
- **Availability:** User can check rental item availability for a specified period.

**Contents Tab** (Figure Rental 2.2.1)

#	Price Contract	Item No.	Item Description	Start Date	End Date	Shipping Date	Return Date	Rental Wfms	Rental Period	Available Qty	Required Qty	Open Qty	Rental Price	Discount %	Start Time	Tax Code	No of Hours
1	Daily-Daily-Daily	AvailItem1	RentalItem1	09/11/15	09/11/15	09/11/15	09/11/15	41	1 Days	40.000	2.000	2.000	\$ 40.00	0.000		EX	
2	Daily-Daily-Daily	AvailItem2	RentalItem2	09/11/15	09/11/15	09/11/15	09/11/15	41	1 Days	39.000	2.000	2.000	\$ 40.00	2.000			
3	Daily-Daily-Daily			09/11/15	09/11/15					0.000	0.000	0.000					

**Figure Rental 2.2.1: Rental Quotation**

**The Contents Tab options:**

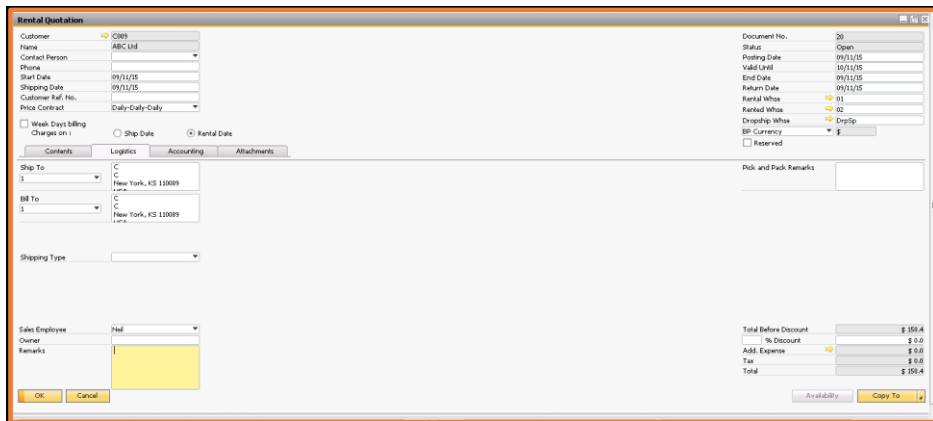
- **Price Contract:** Enter the pricing policy that will be applicable for the rental item on this quotation.
- **Item No.:** Represents the alphanumeric value to identify each item uniquely.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Start Date:** Enter the expected start date of the rental period for the rental item. By default this is the same as defined in the header section but can be changed at a line level.
- **End Date:** Enter the expected end date of the rental Period for the rental item. By default this is the same as defined in the header section but can be changed at a line level.



- **Shipping Date:** Enter the expected shipment date of the rental item. By default, this is the same as defined in the header section but can be changed at a line level.
- **Return Date:** Enter the expected date of return of shipment of the rental item. By default, the system populates End Date entered on the same line. It can be changed, if required.
- **Rental Period:** Displays the number of days between shipment period and rental period, as selected in the header section.
- **Rental Warehouse:** Enter the warehouse from which items should be transferred to rented warehouse. By default, it picks up the warehouse mapped to the location of the document owner otherwise default warehouse defined on item master. It can be changed, if required.
- **Available Quantity:** Shows the available quantity for a rental item in the selected rental warehouse.
- **Required Quantity:** Enter the quantity for the rental item.
- **Reserved Quantity:** Enter the quantity for the rental item you want to reserve.
- **Open Quantity:** Shows the remaining quantity for the rental item that is required to fulfill the Rental Order quantity.
- **Rental Price:** Enter the rental price for the item based on price contract selected in the header section.
- **Discount %:** Enter the discount % for the rental item.
- **Tax Code:** Default tax code linked to the ship to address of selected customer.
- **Total Amount:** Displays total amount of the row.
- **Project:** Used to set the assigned projects for Rental Documents.
- **Dist. Rule:** Used to add cost centers on Rental Document's line item.
- **Row Text:** User can give a comment on Rental Document's line item.

### Logistics Tab

The Rental Quotation Logistics tab captures information about the logistics of the rental quotation (Figure Rental 2.3.1).



Total Before Discount	\$ 155.4
% Discount	\$ 0.0
Add. Expense	\$ 0.0
Tax	\$ 0.0
Total	\$ 155.4

**Figure Rental 2.3.1: Rental Quotation**

### Logistics Tab:

- **Ship To:** The customer's ship-to address as defined in the Business Partner Master Data. If required, change the address.
- **Bill To:** The customer bill-to address defined in the Business Partner Master Data; change, if required.
- **Pick and Pack Remarks:** Enter relevant remarks for the pick and pack procedure.
- **Shipping Type:** Choose relevant shipping carrier or define a new one.

### Defining the Accounting Tab

The Rental Quotation Accounting tab (Figure Rental 2.4.1) captures information regarding the accounting aspects of the rental quotation.



## Accounting Tab options:

The screenshot shows the 'Rental Quotation' window with the 'Accounting' tab selected. The window is divided into several sections:

- Customer Information:** Includes fields for Name (ABC Ltd), Contact Person, Phone, Start Date (09/11/15), Shipping Date (09/11/15), Customer Ref. No., and Price Contract (Daily-Daily-Daily).
- Logistics:** Includes checkboxes for 'Weak Days Billing Changes on' and 'Ship Date', and a radio button for 'Rental Date'.
- Accounting:** Includes 'Payment Terms' (Cash Basic) and 'Payment Method'.
- Summary:** A table showing financial totals:
 

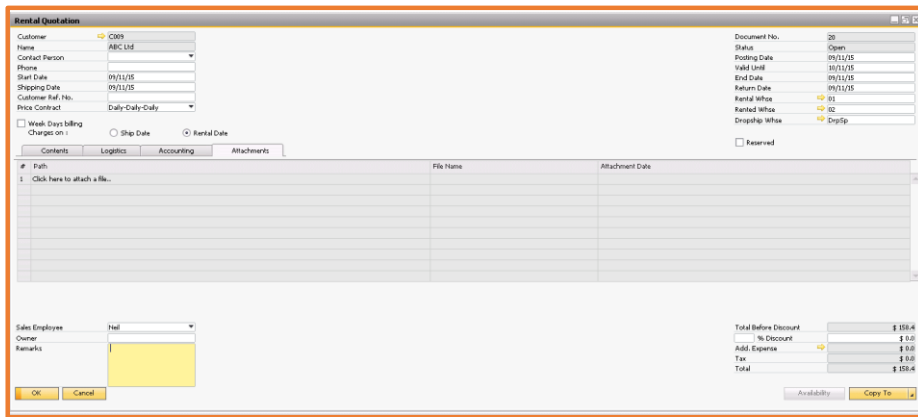
Total Before Discount	\$ 155.4
% Discount	\$ 0.0
Add Expense	\$ 0.0
Tax	\$ 0.0
<b>Total</b>	<b>\$ 155.4</b>
- Other Fields:** Document No. (20), Status (Open), Posting Date (09/11/15), Valid Until (09/11/15), End Date (09/11/15), Return Date (09/11/15), Rental Week (01), Rental Week (02), Dropship status (Drop), BP Currency (\$), and BP Project.

**Figure Rental 2.4.1: Rental Quotation– Accounting tab**

- **Payment Terms:** Displays the payment terms for the particular customer. By default it picks up the terms as defined in the business partner master data. If required, it can be changed.
- **Payment Method:** Displays the payment method for the particular customer. By default it picks up the method as defined in the business partner master data. If required, it can be changed.
- **BP Project:** Displays the projects linked to the particular customer.

## Defining the Attachment Tab

The Attachment tab (Figure Rental 2.5.1) captures information regarding the attachment aspects of the rental quotation.



The screenshot shows the 'Rental Quotation' window with the 'Attachments' tab selected. The window is divided into several sections:

- Customer Information:** Includes fields for Customer (COM), Name (ABC Ltd), Contact Person, Phone, Start Date (09/11/05), Shipping Date (09/11/05), Customer Ref. No., and Price Contract (Daily-Daily-Daily).
- Billing Options:** Radio buttons for 'Week-Days billing', 'Ship Date', and 'Rental Date'.
- Document Details:** Fields for Document No. (20), Status (Open), Posting Date (09/11/05), Valid Until (09/11/05), End Date (09/11/05), Return Date (09/11/05), Rental White (01), Rented White (02), Dropship White (EmpSp), and a 'Reserved' checkbox.
- Attachments Table:** A table with columns for '# Path', 'File Name', and 'Attachment Date'. The first row contains a placeholder: 'Click here to attach a file...'. Below this is a large empty area for listing attachments.
- Summary and Actions:** Includes 'Sales Employee' (Neil), 'Owner', 'Remarks', 'Total Before Discount' (\$ 159.4), '% Discount' (\$ 0.0), 'Add. Expense' (\$ 0.0), 'Tax' (\$ 0.0), and 'Total' (\$ 159.4). At the bottom are 'OK', 'Cancel', 'Availability', and 'Copy To' buttons.

**Figure Rental 2.5.1: Rental Quotation– Attachments tab**

### Attachments Tab options:

- **Path:** Displays the actual path of the attachment, where it is stored in the system
- **File Name:** Displays the name of the attached file
- **Attachment Date:** Displays the date of attachment

### Adding the Rental Quotation

In order to add a rental quotation you need to select the “Rental Quotation” option in the Rental menu. This will open the “Rental Quotation” screen. The screen lists a “General Area”, a “Contents” tab, “Logistics” tab and an “Accounting” tab.

Let’s perform the following steps to add a Rental Quotation in the General Area of the Rental Quotation form:



1. To add a rental quotation, click on the add button on the SAP Business One toolbar, and enter a customer to whom the quotation needs to be sent. In case the customer is not mentioned in the list, please go to the business partner master data and add the required customer.
2. The "Name" will be picked as defined as customer name in the business partner master data.
3. Enter the "Contact Person". By default this is the contact person defined as the contact person against the customer in the business partner master data. It can be changed if other contacts are available in the business partner master data. In case desired contact person is not mentioned in the list, please go to the business partner master data and add the required contact person against the customer.
4. Enter the "Posting Date". By default this is the current date. It can be changed to a future date if required but it works on "Allow Future Posting Date" setting.
5. Enter the "Valid Until" date. By default this field is one month from the posting date. If required, the "Valid Until" date can be changed according to the requirement of the quotation.
6. Enter the "Start Date". By default this is the current date. This can be changed to a future date according to the need of the quotation.
7. Enter the "End Date".
8. Enter the "Shipping Date". By default this is the current date. If required, the "Shipping Date" can be changed to a future date according to the requirement of the quotation.
9. Enter the "Return Date".
10. Enter the "Price Contract". By default it picks the first code defined in Rental Setups → Price Matrix. If required, the "Price Contract" can be changed according to the need of the quotation.
11. Enter the rented warehouse. It will check the "Ship To" address as defined in the business partner master data. If any rented warehouse is mapped to the same location, it will pick the same rented warehouse as default. It can be changed according to the need of the quotation.
12. Select whether you want weekday billing or want to include weekends. By default it will pick the weekday billing option. It can be changed to include weekends if you wish to bill in the manner.
13. Select whether you want to charge on ship date or rental date. By default it picks the setting as defined in Rental Setups.

**Note:** Please note that defining the rental and shipment period is mandatory.

Let's perform the following steps in the Contents tab of the Rental Quotation form:

1. Select the item (Rental, consumable or labor).
2. Enter the "Start Date". By default it picks the start date as defined in the general area. It can be changed according to the start date of the specific item on the quotation.
3. Enter the "End Date". By default it picks the end date as defined in the general area. It can be changed according to the end date of the specific item on the quotation.
4. Enter the Rental warehouse from which items should be transferred to rented warehouse. By default, it picks up the warehouse mapped to the location of the document owner otherwise default warehouse defined on item master. It can be changed, if required.
5. Enter the "Shipping Date". By default it picks the shipping date as defined in the general area. It can be changed according to the shipping date of the specific item on the quotation.
6. Enter the "Return Date". By default it picks the return date as defined in the general area. It can be changed according to the return date of the specific item on the quotation.
7. The "Rental Period" displays the number of days the specific item would be rented based on its shipment or rental period.
8. The "Available Quantity" displays the available stock for the specified item in the selected rental warehouse after considering all reservations and orders for the same period.
9. Enter the "Required Quantity". By default it picks the quantity as one. It can be changed according to the need of the quotation.
10. The "Open Quantity" displays the remaining quantity for the rental item that is required to fulfill the Rental Order quantity.
11. The "Rental Price" displays the calculated price based on the price contract and the rental / shipping period. It cannot be changed for rental items but user can change the price for consumable or labor items if required.
12. Enter the "Discount" for the specific item on the quotation if required.



13. Select the applicable “Tax Code” which would be applicable for the selected item and customer. By default it will pick the tax code as defined in the ship to address in the business partner master data. It can be changed if required.

14. The “Total Amount” displays the total amount based on the price contract, rental period and the required quantity for the specified item on the quotation.

15. If the required quantity is greater than the available quantity for the specified item, the user can check the “Allow Purchase” check box if they would like to purchase the deficit quantity to fulfill the quotation.

16. Enter the “Purchase Quantity”. By default it displays the difference between the required and available quantity for the selected item.

17. Enter the “Purchase Price”. The price entered here would be used to create a purchase order inside SAP Business One.

**Note:** *Please note that there must be at least one rental item in the quotation to process the same.*

Let’s perform the following steps in the Contents tab of the Rental Quotation form:

1. Validate the “Payment Terms.” By default it picks up the terms as defined in the business partner master data. If required, it can be changed.

2. Validate the “Payment Method.” By default it picks up the method as defined in the business partner master data. If required, it can be changed.

3. Select a relevant BP Project Code, if required to be attached to the rental quotation. You can add more item lines in the same manner as defined above.

4. Click the add button.

The rental quotation will now be saved.

## Viewing the Rental Quotation

In order to view the Rental Quotation you need to select Rental Quotation menu option in the Rental menu. This will open the Rental Quotation form.

Let's perform the following steps to view the rental quotation:

1. To view a rental quotation, click on the find button on the SAP Business One toolbar, and one can enter the quotation number in the document number field. Alternatively, user can enter the customer number, and the system will pick the first rental quotation against the customer name.
2. Alternatively to view a rental quotation, the user can also use the navigation buttons of the SAP Business One toolbar.

## Updating the Rental Quotation

In order to update the Rental Quotation you need to select Rental Quotation menu option in the Rental menu. This will open the Rental Quotation form.

Let's perform the following steps to update a rental quotation:

1. If selected quotation is not closed or cancelled, the user can update the rental quotation, in the same manner as it was added.

**Note:** Please note that the quotation number cannot be changed if the user is updating and existing quotation.

## Copying Rental Quotation

The Copy - To function lets you copy only Rental Quotation document to the Rental Order document.

**Figure Rental 2.9.1: Rental Quotation– Copy To**

### Adding Row Text

This feature allows user to add Row Text to Rental Quotations. User can either type in the text or can add predefined Text using this functionality.

User needs to perform the following steps to add Row Text:

1. Double click on the Item No. column at the row where text needs to be added.
2. “Row Text Details” window pops up. Type in the text in the given area and click on the “OK” button.
3. To add predefined texts, click on the “Insert Predefined Texts” button.
4. “List of Predefined Text” window opens up. Select the required text from the list or use the “New” button to enter a new predefined text.
5. Click on the “Choose” button.

This functionality has been shown in the Figure Rental 2.10.1

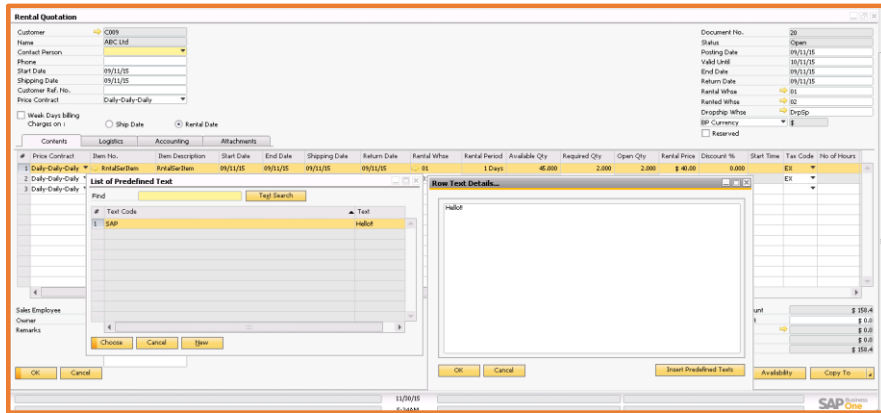


Figure Rental 2.10.1: Rental Quotation– Adding Row Text

## Reserve Serial Number Report

The Reserved serial number report would be displayed on the rental quotation in context menu of the general section is serial number is reserved on the rental quotation.

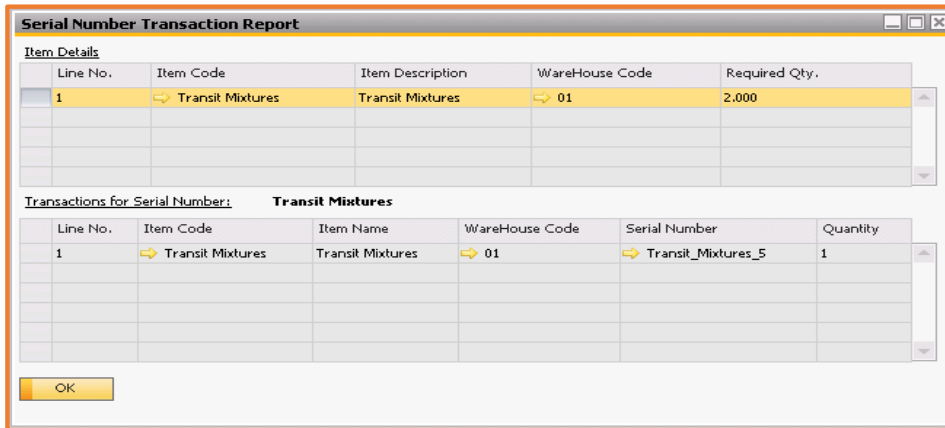


Figure Rental 2.11.1: Rental Quotation– Serial Number Transaction Report



The **Item Details** in the Reserve Serial Number report contains the following options:

- **Line No:** Line number of the item for which extension is created.
- **Item Code:** Item Code.
- **Item Description:** Item Description.
- **Warehouse code:** Rental warehouse.
- **Required Quantity:** Return date which at the time of extension.

The **Transactions for Serial Number in the Reserve Serial Number report** contains the following options:

- **Line No:** Line number of the item for which extension is created
- **Item Code:** Item Code
- **Item Description:** Item Description
- **Warehouse code:** Rental warehouse
- **Serial Number:** Serial number reserved for the item
- **Required Quantity:** Return date which at the time of extension

### Toolbox operations Rental Quotation



**Figure Rental 2.12.1 Rental Quotation**

The Print Preview, Print and Email tools can be used for Rental Quotation.

## Rental Quotation Document

<p><b>OEC Computers - Rental</b></p> <p>1901 Maynesboro Drive Suite 200 New York -19065 New York, USA</p> <p><b>Address</b>          Norm Thompson          300 Billings Drive          Suite 500          Havertown PA 19063          USA</p> <p>Fax no: (610) 565-9032          Payment: 2P10Net30</p>		<p>VAT No: US25-987634          Phone: (610) 768-7465          Fax: (610) 948-9384</p> <p><b>Rental Quote</b></p> <p><b>Quote no:</b> 8  <b>Date:</b> 03/13/2014  <b>Our Ref:</b>  <b>Your Ref:</b>  <b>Ref no:</b>  <b>Currency:</b> \$</p> <p>Page 1 of 1</p>
--	--	---

Item No	Description	Quantity	Rental Days	Price	Amount
	Diesel Pumpset	1.00	1	\$ 100.00	100.00

<p><b>Rental Period:</b>          Start Date : 19/02/2014      End Date : 19/02/2014          Ship Date : 19/02/2014      Return Date : 19/02/2014</p>	<p>Order Balance : \$ 100.00          Discount : \$ 0          Additional Exp.: \$ 0          VAT: \$ 6.00  <b>Total:</b> \$ 106.00</p>
--	---

Figure Rental 2.12.1 Rental Quotation Document

The **Rental Quotation Document** contains the following options:

- **Vat No:** VAT No. given on the rental quotation.
- **Phone:** Phone no of the contact person.
- **Fax:** Fax of the contact person.
- **Quote No:** Rental quotation number.
- **Date:** Rental document date.
- **Our Ref:** Owner of the rental quotation.
- **Your Ref:** Contact person selected on the rental quotation.

- **Ref No:** Number at card on the rental quotation.
- **Currency:** Currency of the rental quotation.
- **Address:** Address of the customer.
- **Item No:** Item code for which quotation is created.
- **Description:** Item description for which quotation is created.
- **Quantity:** Quantity of the item.
- **Rental Days:** Total rental days.
- **Price:** Price of the item.
- **Amount:** Amount of the line item.
- **Start Date/End Date:** Start date of the rental quotation.
- **Ship Date/Return Date:** End date of the rental quotation
- **Order Balance:** Order balance of the customer.
- **Discount:** Discount on the item.
- **Additional Exp.:** Additional expense on the rental quotation.
- **Vat Amount:** Vat amount on the line item.

### Working with Rental Order

This Rental Order menu option opens the Rental Order form, which allows you to define the rental information. The Rental Order is a commitment from a customer or a lead to rent a product. The document serves as a foundation for planning production or Purchase Orders. The Rental Order form helps to convert the Rental Quotation to the Rental Order. In addition, the Rental Quotation form helps to add, view, and cancel the rental quotation.

The Rental Order form is used to convert Rental Quotations to Rental Orders or create a fresh order if a quote hasn't been already prepared. The Rental Order form is used to add, view, and modify the Rental Order. It contains necessary information for preparing the Rental Order. Figure Rental 3.1 displays the Rental Order form:

**Figure Rental 3.1: The Rental Order – General Pane**

## Defining the General Area

The General Area of the Rental Order form contains the following options:

- **Customer:** Displays the customer number as defined in the Business Partner Master data.
- **Name:** Displays the name of the customer as defined in the Business Partner Master data.
- **Contact Person:** Name of the default contact person as defined in the Business Partner Master data. If required, enter a different contact person.
- **Phone:** Phone Number of the default / selected contact person.
- **Start Date:** Enter the expected start date of the rental period. By default this is the current date.
- **Shipping Date:** Enter the expected shipment date of the items. By default, this is the current date.
- **Customer Ref. No:** Represents the alphanumeric number to uniquely identify each customer.
- **Price Contract:** Enter the pricing policy that will be applicable for the rental Item on this order.
- **Document No:** Number of the Rental Order.
- **Status:** Displays the status of the Rental Order. It can either be open, rented, closed or cancelled.



- **Posting Date:** Enter the posting date. The default value for this field is the current date on which the order is created. If required, change the date.
- **Valid Until:** Enter the validity date for which the Rental Order would be valid. The default value for this field is one month from the posting date.
- **End Date:** Enter the expected end date of the rental period.
- **Return Date:** Enter the expected date of return of shipment. By default, this is the end date.
- **Rental Warehouse:** This feature allows user to define **Rental Warehouse** for the **Rental Quotation**. There is flexibility of defining the **Rental Warehouse** at the Line Level Items as well.
- **Rented Warehouse:** Used to set the default rented warehouse for the rental documents.
- **Dropship Warehouse:** Used to put the items at the time of shipping of goods. It's a virtual warehouse, which virtually shows the goods transfer to the customer. On transfer of items in this warehouse, items do not actually transfer from the warehouse in which they are stored.
- **Enable Alert:** Enter whether alerts should be enabled for the order, if configured in rental setup.
- **Process Order:** If selected, it will automatically process the Rental Order documents on addition of the same.
- **Week Day Billing:** Enter whether customer should be billed only for weekdays as specified in SAP Business One calendar.
- **Charges on: Ship Date / Rental Date:** Enter whether the customer should be billed on shipment period or rental period.
- **Immediate Invoice:** This feature allows user to generate Invoice at the time of Adding Rental Order for the quantity entered in the Delivered Quantity column. This option will be available only if Immediate Invoicing check box has been marked on the Rental Setup.
- **Reserved:** If the reserved check box in the quotation screen is checked, the status of the quotation is changed to "Reserved", and user can reserve serials on rental quotation. When checked, reserved quantity column would be available at row level to partially reserve an item.
- Marking the Immediate Invoice checkbox will lead to the following:
  - Inventory Transfer will be taken place on the posting date of the Rental Order.
  - Invoice will be created on the date given in Invoice Date field.



- Invoice will be created for the quantity given in the Delivered quantity column for the added Items. By default, value of the Required Quantity column will be copied to the Delivered Quantity column. User will also be able to create Partial Immediate Invoice by updating the quantity in this column.
- Immediate Invoice Tab will get activated.
- **Invoice Date:** Enter the date, when the invoice has been generated.
- **Sales Employees:** To add the name of the sales employee for the rental quotation.
- **Owner:** Enter the name of the employee, who owns the Rental Order.
- **Remarks:** Enter additional information regarding Rental Order.
- **Total before Discount:** Total amount of the Rental Order before the discount for the document is calculated.
- **% Discount:** In the field, on the left, enter the percentage of discount. The field on the right displays the amount of the discount.
- **Add Expense:** Enter / Load additional costs for the Rental Order.
- **Tax:** Tax amount for the rental quotation calculated according to the tax definitions.
- **Total:** Total amount for the Rental Order including tax, additional expenses and discounts.
- **Cancelled:** If the user right clicks on an existing order screen, there is a cancel option. If user selects the option, the status of the order is changed to “Cancelled”.
- **Availability:** User can check rental item availability for a specified period.
- **Order Details:** Displays the order history for the particular order.
- **Open:** By default, the status of all new orders is open.
- **Rented:** If an order has been processed, either partially or completely, the status of the order changes to “Rented”.
- **Closed:** When all items on the order have been returned / consumed and invoiced for, the status for the order is “Closed”.
- **Rental Quotation:** To select a rental quotation you wish to convert into a Rental Order.
- **BP Currency drop down:** Identify the currency on the basis of which price will be calculated on order. BP currency is the currency set on Business Partner Master Data.

#	Sell Item	Price Contract	Item No.	Item Description	Start Date	End Date	Shipping Date	Return Date	Start Time	No of Hours	Rental Wtse	Available Qty	Required Qty	Open Qty	Rental Price	Discount %	Tax Code	Project
1	No	Week-Daily-Daily	→	RntalSer01RntalSerItem	09/01/15	09/06/15	09/01/15	09/09/15			→ 01	40,000	3,000	0,000	\$ 300.00	0.00	EX	
2	No	Week-Daily-Daily	→	RntalSer01RntalSerItem2	09/01/15	09/06/15	09/01/15	09/09/15			→ 01	10,000	3,000	0,000	\$ 300.00	0.00	EX	
3	No	Week-Daily-Daily	→	RntalSer01RntalSerItem	09/01/15	09/06/15	09/01/15	09/09/15			→ 01	40,000	1,000	0,000	\$ 50.00	0.00	EX	
4	No	Daily-Daily-Daily	→								0.000	0.000	0.000					

Figure Rental 31.1.1: Rental Order– Immediate Invoice feature

## Defining the Contents Tab

The Contents tab of the Rental Order form helps to define the contents related information of the Rental Order. The various options in the Content tab (Figure Rental 3.2.1) are as follows:

#	Sell Item	Price Contract	Item No.	Item Description	Start Date	End Date	Shipping Date	Return Date	Start Time	No of Hours	Rental Wtse	Available Qty	Required Qty	Open Qty	Rental Price	Discount %	Tax Code	Project
1	No	Week-Daily-Daily	→	RntalSer01RntalSerItem	09/01/15	09/06/15	09/01/15	09/09/15			→ 01	40,000	3,000	0,000	\$ 300.00	0.00	EX	
2	No	Week-Daily-Daily	→	RntalSer01RntalSerItem2	09/01/15	09/06/15	09/01/15	09/09/15			→ 01	10,000	3,000	0,000	\$ 300.00	0.00	EX	
3	No	Week-Daily-Daily	→	RntalSer01RntalSerItem	09/01/15	09/06/15	09/01/15	09/09/15			→ 01	40,000	1,000	0,000	\$ 50.00	0.00	EX	
4	No	Daily-Daily-Daily	→								0.000	0.000	0.000					

Figure Rental 3.2.1: The Rental Order – Contents Tab



- **Item No:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Start Date:** Enter the expected start date of the rental period for the rental item. By default this is the same as defined in the header section but can be changed at a line level.
- **End Date:** Enter the expected end date of the rental Period for the rental item. By default this is the same as defined in the header section but can be changed at a line level.
- **Shipping Date:** Enter the expected shipment date of the rental item. By default, this is the same as defined in the header section but can be changed at a line level.
- **Return Date:** Enter the expected date of return of shipment of the rental item. By default, the system populates End Date entered on the same line. It can be changed, if required.
- **Rental Period:** Display the number of days between shipment period and rental period, as selected in the header section.
- **Rental Warehouse:** Enter the warehouse from which items should be transferred to rented warehouse. By default, it picks up the warehouse mapped to the location of the document owner otherwise default warehouse defined on item master. It can be changed, if required.
- **Available Quantity:** Shows the available quantity for a rental item in the selected rental warehouse.
- **Required Quantity:** Enter the quantity for the rental item.
- **Reserved Quantity:** Enter the quantity for the rental item you want to reserve.
- **Open Quantity:** Shows the remaining quantity for the rental item that is required to fulfill the Rental Order quantity.
- **Rental Price:** Enter the rental price for the item based on price contract selection in the header section.
- **Discount %:** Enter the discount % for the rental item.
- **Tax Code:** Default tax code linked to the ship to address of selected customer.
- **Service Contract:** This check box will be checked if service contract needs to be created for the order.
- **Warranty:** This check box will be checked if warranty is to be provided to the customer for the item on an order.



- **Total Amount:** Displays total amount of the row.
- **Last Invoice No.:** Displays the last invoice number which was created against this particular Rental Order.
- **Last Invoice Date:** Displays the last invoice date when the invoice was created against this particular Rental Order.
- **Returned:** The check box will be checked if the rental item has been returned.
- **Returned Quantity:** Displays the quantity of the rental item that has been returned.
- **Vehicle Return:** Displays the quantity of the rental item which was returned from the vehicle warehouse.
- **Sell Item:** Specifies whether the Item is for Sell. If set to Yes, Invoice will be created when the Rental Order is added, for the selling Item the price will be picked up from identified Sales Price List.
- 

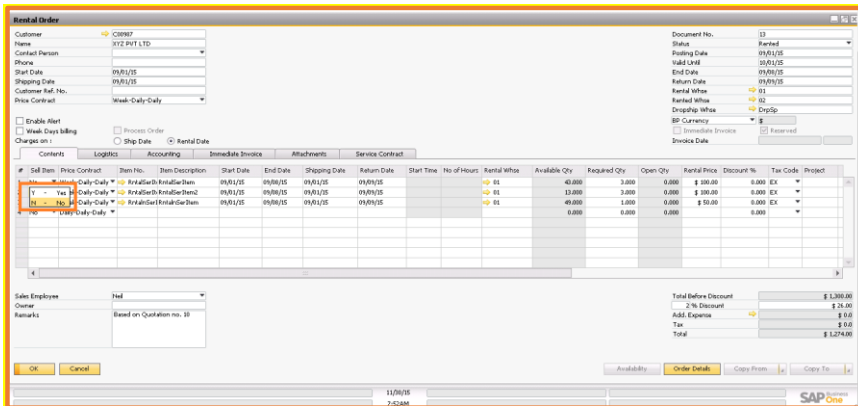
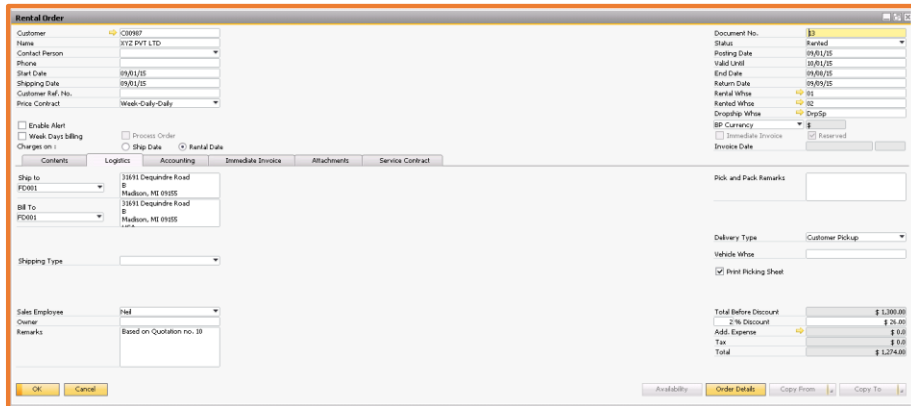


Figure Rental 3.2.2: Rental Order– Sell Item Feature

## Defining the Logistic Tab

The Rental Order Logistics tab captures information on the logistics of the Rental Order.

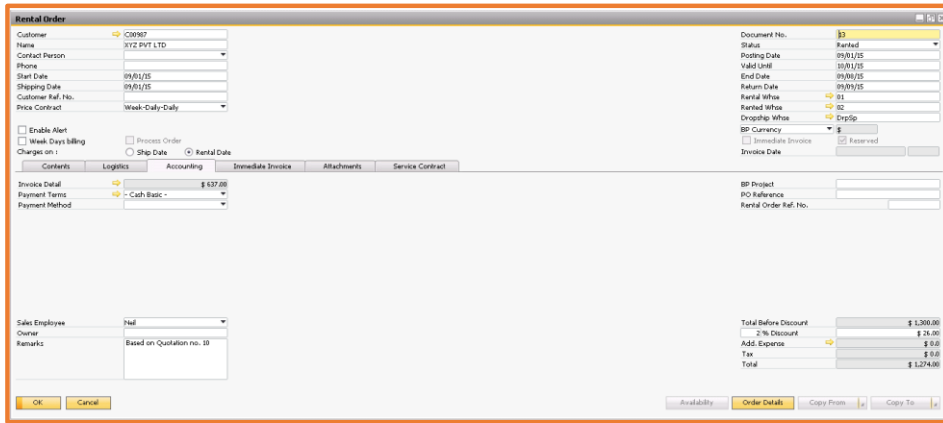


**Figure Rental 3.3.1: The Rental Order – Logistic Tab**

- **Ship To:** The customer’s ship-to address as defined in the Item Master Data. If required, change the address.
- **Bill To:** The customer bill-to address defined in the Item Master Data; change, if required.
- **Pick and Pack Remarks:** Enter relevant remarks for the pick and pack procedure.
- **Shipping Type:** Choose relevant shipping carrier.
- **Delivery Type:** Choose relevant delivery type. It can be either Direct or Vehicle.
- **Vehicle Warehouse:** In case of vehicle delivery, it displays the warehouse code assigned to the vehicle warehouse. By default, it picks up the warehouse code mapped to the location of the document owner.

### Defining the Accounting Tab

The Rental Order Accounting tab captures information regarding the accounting aspects of the Rental Quotation. The Accounting tab of the Rental Order form is shown in Figure Rental 3.4.1:



**Figure Rental 3.4.1: Rental Order**

- **Invoice Details:** Displays the A/R invoice created against a particular Rental Order.
- **Payment Terms:** Displays the payment terms for the particular customer. By default it picks up the terms as defined in the business partner master data. If required, it can be changed.
- **Payment Method:** Displays the payment method for the particular customer. By default it picks up the method as defined in the business partner master data. If required, it can be changed.
- **BP Project:** Displays the projects linked to the particular customer.
- **PO Reference:** Displays the reference number of the purchase order, if any.
- **Rental Order Ref. No.:** It is used to capture the reference of another Rental Order, if any.

### Defining the Immediate Invoice Tab

Immediate Invoice Tab of the Rental Order Captures information about the Immediate Invoicing feature. It has following three fields under it:

- **Order Process Series:** Enables User to select series for the Inventory transfer while processing the Rental Order.
- **Invoice Series:** Enables User to select series for Rental Invoice.
- **Freight Tax Code:** Enables User to select Tax code for the Freight selected on the Rental Invoice.

The screenshot shows the 'Rental Order' window with the 'Immediate Invoice' tab selected. The interface includes a top navigation bar with tabs for 'Contents', 'Logistics', 'Accounting', 'Immediate Invoice', 'Attachments', and 'Service Contract'. The 'Immediate Invoice' tab is active, showing a summary of the order and invoice details.

**Customer Information:**

- Customer: C00987
- Name: XYZ PVT LTD
- Contact Person: [Empty]
- Phone: [Empty]
- Start Date: 09/01/15
- Shipping Date: 09/01/15
- Customer Ref. No.: [Empty]
- Price Contract: Week-Daily-Daily

**Document Information:**

- Document No.: 03
- Status: Rental
- Posting Date: 09/01/15
- Valid Until: 01/01/15
- End Date: 09/30/15
- Return Date: 09/30/15
- Rental Week: 01
- Rental Week: 02
- Dropship Week: Drop

**Order Processing:**

- Order Process Series: Primary
- Invoice Series: NEW

**Financial Summary:**

Total Before Discount	\$ 1,300.00
2% Discount	\$ 26.00
Add Expense	\$ 0.00
Tax	\$ 0.00
<b>Total</b>	<b>\$ 1,274.00</b>

Buttons at the bottom include 'OK', 'Cancel', 'Availability', 'Order Details', 'Copy From', and 'Copy To'.

**Figure Rental 3.5.1: Rental Order– Immediate Invoice Tab**

## Defining the Attachments Tab

The Rental Order Attachment tab (Figure Rental 3.6.1) captures information regarding the attachment aspects of the rental quotation.

**Figure Rental 3.6.1: Rental Order– Immediate Invoice Tab**

The Accounting tab in the Rental Order form contains the following options:

- **Path:** Displays the actual path of the attachment, where it is stored in the system.
- **File Name:** Displays the name of the attached file.
- **Attachment Date:** Displays the date of attachment.

### Defining the Service Contract Tab

The User can select the service contract type for the Rental Order in the Service Contract tab. Service contract and service calls created against the Rental Order will also be exposed on this tab.

**Rental Order**

Customer	470000	Document No.	39
Name	Amazon	Status	Rented
Contact Person	dennis1	Posting Date	10/31/15
Phone		Valid Until	12/30/15
Start Date	11/30/15	End Date	12/30/15
Shipping Date	11/30/15	Return Date	12/31/15
Customer Ref. No.		Rental Whse	01
Price Contract	Daily-Daily-Daily	Rented Whse	02
		Dropship Whse	DrpSp

Enable Alert  
 Week Days billing  
 Process Order  
 Immediate Invoice  
 Reserved

Charges on :  Ship Date  Rental Date

Invoice Date: \_\_\_\_\_

Contents | Logistics | Accounting | Immediate Invoice | Attachments | Service Contract

Contract Type: **Serial Number** | Service Contract No.: 5

Service call details

Call Id	Create Date	Serial No.	Subject	Discription	Auto/Manual
		N - None			
		C - Customer			
		S - Serial Number			

Sales Employee: Neil

Total Before Discount	\$ 1,240.00
% Discount	\$ 0.0
Add. Expense	\$ 0.0
Tax	\$ 0.0
<b>Total</b>	<b>\$ 1,240.00</b>

OK | Cancel | Availability | Order Details | Copy From | Copy To

### Header Section

- **Contract type:** Enables User to select service contract type for the Rental Order it could be either customer or serial number. Default would be none.
- **Service contract no:** Displays generated service contract document number against selected Rental Order.

**Rental Order**

Customer: 497000  
 Name: Amazon  
 Contact Person: denner1  
 Phone:   
 Start Date: 11/09/15  
 Shipping Date: 11/09/15  
 Customer Ref. No.:   
 Price Contract: Daily-Daily-Daily

Document No.: 35  
 Status: Rented  
 Posting Date: 10/31/15  
 Valid Until: 12/30/15  
 End Date: 12/30/15  
 Return Date: 12/31/15  
 Rental Week: 91  
 Rented Week: 92  
 Dropship Week: DrpSp

Enable Alert  
 Week Days Billing  
 Process Order  
 Ship Date  
 Rental Date

Charges on:   
 Immediate Invoice  
 Reserved  
 Invoice Date

Contents | Logistics | Accounting | Immediate Invoice | Attachments | Service Contract

Contract Type:   
 Serial Number:   
 Service Contract No.: \$

Call Id	Create Date	Status	Item	Serial No.	Subject	Description	Auto/Manual
4	10/31/15	In Process	RentalSerItem	RentalSerItem_35	Service Req		Manual
5	10/31/15	In Process	RentalSerItem2	xx35	Service Req		Manual

Sales Employee: Neil  
 Owner:   
 Remarks:   
 Total Before Discount: \$ 1,240.00  
 % Discount: \$ 0.0  
 Add. Expense: \$ 0.0  
 Tax: \$ 0.0  
 Total: \$ 1,240.00

OK Cancel Availability Order Details Copy From Copy To

- **Call Id:** Service call id linked with selected rental order.
- **Create Date:** Service call creation date.
- **Status:** Current status of the service call.
- **Item:** Item for which service call created.
- **Serial No.:** Serial number(s) of the item.
- **Subject:** Subject of the service call.
- **Description:** Description of the service call.
- **Auto/Manual:** Displays service created manually or automatically by the system.

## Adding the Rental Order

In order to add a Rental Order you need to select the “Rental Order” option in the Rental menu. This will open the “Rental Order” screen. The screen lists a General Area, a “Contents”, “Logistics” and an “Accounting” tab.

Let’s perform the following steps in the General Area of the Rental Order form to add a Rental Order:



1. To add a Rental Order, click on the add button on the SAP Business One toolbar, and enter a customer to whom the order needs to be sent. In case the customer is not mentioned in the list, please go to the business partner master data and add the required customer.
2. The “Name” will be picked as defined as customer name in the business partner master data.
3. Enter the “Contact Person”. By default this is the contact person defined as the contact person against the customer in the business partner master data. It can be changed if other contacts are available in the business partner master data. In case desired contact person is not mentioned in the list, please go to the business partner master data and add the required contact person against the customer.
4. Enter the “Posting Date”. By default this is the current date. It can be changed to a future date if required but it works on “Allow Future Posting Date” setting.
5. Enter the “Valid Until” date. By default this field is one month from the posting date. If required, the “Valid Until” date can be changed according to the requirement of the order.
6. Enter the “Start Date”. By default this is the current date. This can be changed to a future date according to the need of the order.
7. Enter the “End Date”.
8. Enter the “Shipping Date”. By default this is the current date. If required, the “Shipping Date” can be changed to a future date according to the requirement of the order.
9. Enter the “Return Date”.
10. Enter the “Price Contract”. By default it picks the first code defined in Rental Setups → Price Matrix. If required, the “Price Contract” can be changed according to the need of the order.
11. Enter the rented warehouse. It will check the “Ship To” address as defined in the business partner master data. If any rented warehouse is mapped to the same location, it will pick the same rented warehouse as default. It can be changed if required.
12. Select whether you want weekday billing or want to include weekends. By default it will pick the weekday billing option. It can be changed to include weekends if you wish to bill in the manner.
13. Select whether you want to charge on ship date or rental date. By default it picks the setting as defined in Rental Setups.





**Note:** Please note that defining the rental and shipment period is mandatory.

Let's perform the following steps in the Contents tab of the Rental Order form to add a Rental Order:

1. Select the item (Rental, consumable or labor).
2. Enter the "Start Date". By default it picks the start date as defined in the general area. It can be changed according to the start date of the specific item on the order.
3. Enter the "End Date". By default it picks the end date as defined in the general area. It can be changed according to the end date of the specific item on the order.
4. Enter the Rental Warehouse. By default it picks the default warehouse as defined in the item master data, if the default warehouse is a rental warehouse. Otherwise it picks the first warehouse available in the rental warehouse list. It can be changed if required.
5. Enter the "Shipping Date". By default it picks the shipping date as defined in the general area. It can be changed according to the shipping date of the specific item on the order.
6. Enter the "Return Date". By default it picks the return date as defined in the general area. It can be changed according to the return date of the specific item on the order.
7. The "Rental Period" displays the number of days the specific item would be rented based on its shipment or rental period.
8. The "Available Quantity" displays the available stock for the specified item in the selected rental warehouse after considering all reservations and orders for the same period.
9. Enter the "Required Quantity". By default it picks the quantity as one. It can be changed according to the need of the order.
10. The "Open Quantity" displays the remaining quantity for the rental item that is required to fulfill the Rental Order quantity.
11. The "Rental Price" displays the calculated price based on the price contract and the rental / shipping period. It cannot be changed for rental items but user can change the price for consumable or labor items if required.



12. Enter the "Discount" for the specific item on the order if required.
13. Select the applicable "Tax Code" which would be applicable for the selected item and customer. By default it will pick the tax code as defined in the ship to address in the business partner master data. It can be changed if required.
14. The "Total Amount" displays the total amount based on the price contract, rental period and the required quantity for the specified item on the order.
15. If the required quantity is greater than the available quantity for the specified item, the user can check the "Allow Purchase" check box if they would like to purchase the deficit quantity to fulfill the order.
16. Enter the "Purchase Quantity". By default it displays the difference between the required and available quantity for the selected item.
17. Enter the "Purchase Price". The price entered here would be used to create a purchase order inside SAP Business One.
18. If the user allows purchase in the case of available quantity being lesser than the required quantity, then the Create PO check box will be checked.
19. Displays the last invoice number which was created against this particular Rental Order.
20. Displays the last invoice date when the invoice was created against this particular Rental Order.
21. The check box will be checked if the rental item has been returned.
22. Displays the quantity of the rental item that has been returned.
23. Displays the quantity of the rental item which was returned from the vehicle warehouse.
24. Select the service contract check box on line item for which service will be provided for the customer.
25. Select the warranty check box on line item for which warranty will be provided along with the service.

**Note:** Please note that there must be at least one rental item in the order to process the same.

Let's perform the following steps in the Accounting tab of the Rental Order form to add a Rental Order:

1. Validate the "Ship To" address. By default, it picks the ship to address as defined in the business partner master data for the specified customer. It can be changed if required.
2. Validate the "Bill To" address. By default, it picks the bill to address as defined in the business partner master data for the specified customer. It can be changed if required.
3. Enter an appropriate shipping type, if required. It will display all the shipping types defined in Administration → Setups → Inventory → Shipping Types in SAP Business One. You can define a new shipping type if required.
4. Enter relevant pick and pack remarks, if necessary.
5. Validate appropriate "Delivery Type."
6. If the delivery type is "Vehicle Delivery", validate the Vehicle Warehouse.
7. Enter an owner for the document, if required.
8. Enter % discount and additional expenses if applicable.
- 9.

The Rental Order will now be saved.

### **Converting a Rental Quotation to a Rental Order**

In order to convert an existing rental quotation to a Rental Order you need to select the "Rental Order" menu option from the Rental menu. This will open the Rental Order form.

Let's perform the following steps to convert an existing rental quotation to a Rental Order:

1. Select the customer.
2. Click on the "Copy From" button at the bottom of the screen. It will open a list of all open quotations created for the selected customer.
3. Select the desired quotation and the data would be copied from the quotation to the Rental Order.

4. You can modify the data if necessary.

5. Click add button.

The Rental Order will now be saved. Copy From feature has been shown in the Figure Rental 3.8.1.

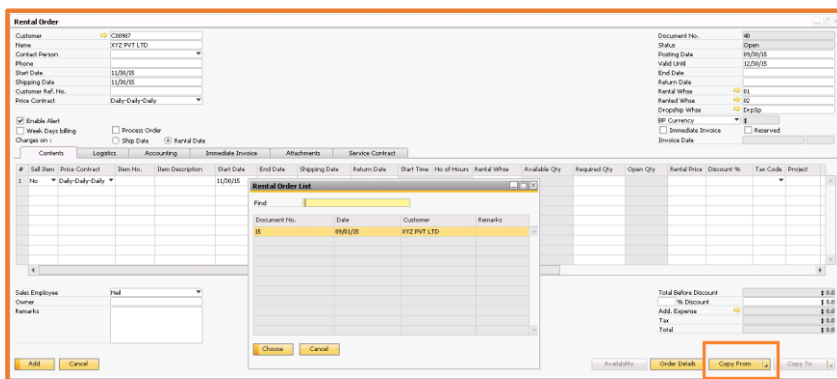


Figure Rental 3.8.1: Rental Order– Copy From

## Copying Data from Rental Order

**Copy To – Add Advanced Payment:** The Copy - To function allows you to copy a Rental Order document data to an /R Down Payment Invoice.

## Viewing the Rental Order

Let's perform the following steps to view the Rental Order information:

1. To view a Rental Order, click on the find button on the SAP Business One toolbar, and one can enter the order number in the document number field. Alternatively, user can enter the customer number, and the system will pick the first Rental Order against the customer name.

2. Alternatively, to view a Rental Order, the user can also use the navigation buttons of the SAP Business One toolbar.

## Updating the Rental Order

Let's perform the following steps to update the Rental Order information:

In order to edit an existing Rental Order one has to first open the Rental Order following steps defined above in "View a Rental Order". If the selected order status is not "Closed" or "Cancelled", the user can update the Rental Order, in the same manner as it was added.

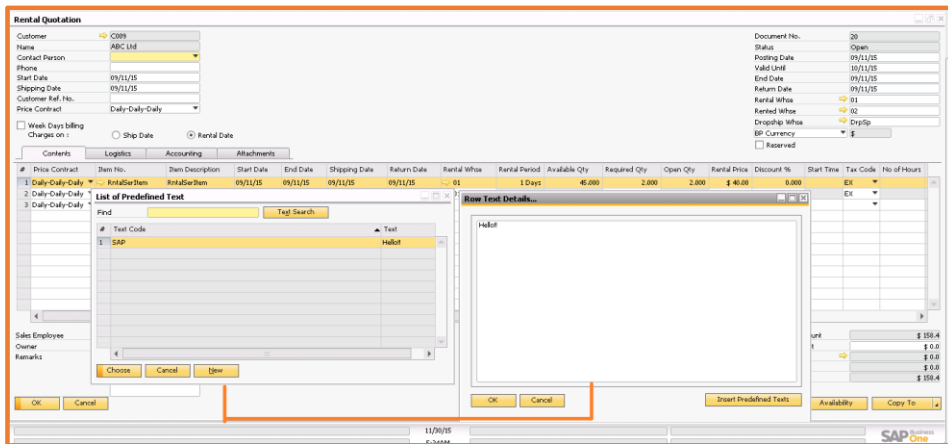
**Note:** Please note that the order number does not get changed if the user is updating an existing order.

## Adding Row Text

This feature allows user to add Row Text to Rental Orders. User can either type in the text or can add predefined Text using this functionality.

User needs to perform the following steps to add Row Text:

1. Double click on the Item No. column at the row where text needs to be added.
2. "Row Text Details" window will open up. Type in the text in the given area and click on the "OK" button.
3. To add predefined texts, click on the "Insert Predefined Texts" button.
4. "List of Predefined Text" window will be popped up. Select the required text from the list or use the "New" button to enter a new predefined text.
5. Click on the "Choose" button.



**Figure Rental 3.12.1: Rental Quotation – Adding Row Text**

Let's learn to process the Rental Order.

### Working with partial reservation

- User can partially reserve serial numbers for the item.
- User needs to perform the following steps to reserve the serial numbers partially on the Rental Order:
  - Check reserved check box on Rental Order, reserved quantity column would be displayed in the row to update the quantity.
  - Enter the quantity on the Reserved Qty.
  - Click Add to reserve serials.

**Rental Order**

Customer: C03  
Name: ABC LME  
Contact Person: [Dropdown]  
Phone: [Field]  
Start Date: 09/11/15  
Shipping Date: 09/11/15  
Customer Ref. No.: [Field]  
Price Contract: Daily-Daily-Daily

Document No.: 40  
Status: Open  
Posting Date: 09/11/15  
Valid Until: 09/11/15  
End Date: 09/11/15  
Return Date: 09/11/15  
Rental White: 01  
Reserved White: 02  
Drawing White: 01/02/03  
BP Currency: \$  
 Preserve Invoice Date

Enable Alert  
 Week Days Billing  
Charges on:  Stop Date  Partial Date

Item No.	Price Contract	Item No.	Item Description	Start Date	End Date	Shipping Date	Return Date	Start Time	No. of Hours	Rental White	Available Qty	Required Qty	Reserved Qty	Open Qty	Rental Price	Discount %
1	No	Daily-Daily-Daily	RentalSerItem	09/11/15	09/11/15	09/11/15	09/11/15			01	29,000	5,000	2,000	5,000	\$ 240.00	0.000
2	No	Daily-Daily-Daily	RentalSerItem2	09/11/15	09/11/15	09/11/15	09/11/15			01	13,000	3,000	2,000	3,000	\$ 340.00	2.000
3	No	Daily-Daily-Daily	RentalSerItem2	09/11/15	09/11/15	09/11/15	09/11/15			01	0,000	0,000	0,000	0,000		0.000

Sales Employee: had  
Owner: [Field]  
Remarks: Based on Quotation no. 30

Total Before Discount: \$ 2,199.6  
% Discount: \$ 1.0  
Add. Expense: \$ 0.0  
Tax: \$ 0.0  
Total: \$ 2,199.6

Buttons: Add, Cancel, Availability, Order Details, Copy From, Copy To

11/09/15 12:40:04 SAP One

Figure Rental 3.13.1: Rental Quotation– Partial Reservation

### Rental Order Extension History

After a Rental Order is placed the “Extension History” menu option will be visible on the Rental Order. It contains all of the information related to the extension of the Rental Order.

**Extension History**

Document Number	Line No	Item Code	Item Description	End Date	Return Date
38	1	Diesel Pumpset	Diesel Pumpset	03/18/2014	03/18/2014
				03/26/2014	03/26/2014
				03/29/2014	03/29/2014

OK

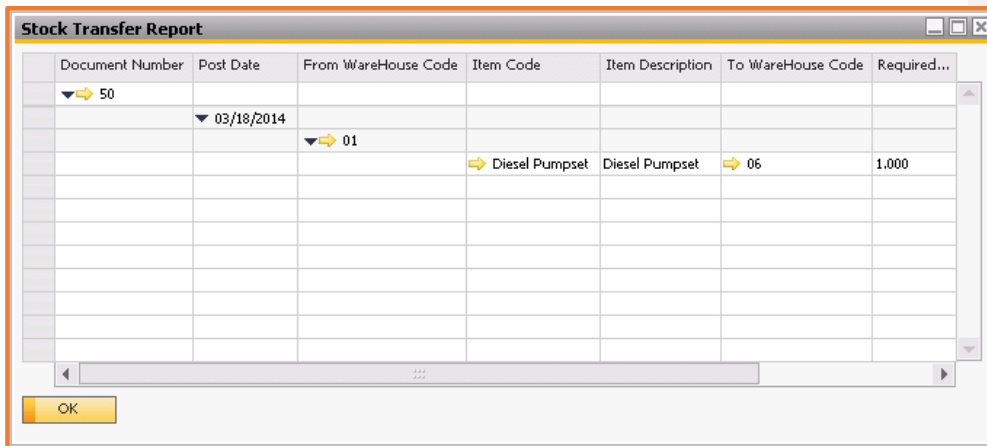
Figure Rental 3.15.1: Extension History

**The Extension History options include:**

- **Document Number:** Rental order document number.
- **Line No:** Line number of the item for which extension is created.
- **Item Code:** Item Code.
- **Item Description:** Item Description.
- **End Date:** End date which at the time of extension.
- **Return Date:** Return date which at the time of extension.

**Rental Order Stock Transfer**

The Stock Transfer Report would be visible on the Rental Order after it has been processed. It shows information about the stock transfers which are created during the Rental Order processing.



Document Number	Post Date	From Warehouse Code	Item Code	Item Description	To Warehouse Code	Required...
50	03/18/2014	01	Diesel Pumpset	Diesel Pumpset	06	1,000

**Figure Rental 3.16.1: Stock Transfer Report**



**The Extension History options:**

- **Document Number:** Rental order document number.
- **Posting Date:** Posting date of the Rental Order.
- **From Warehouse:** Warehouse from which stock is going to be rented.
- **Item Code:** Item code on the rental return.
- **Item Description:** Item description.
- **To Warehouse:** Warehouse in which stock is going.
- **Required Quantity:** Rented quantity.
- **Comment:** Comments on the Rental Order.

**Reserve Serial Number Report**

The Reserved Serial Number report would be displayed on the Rental Order, in the context menu of the general section you will see the serial number is reserved on the Rental Order.

Serial Number Transaction Report					
Item Details					
Line No.	Item Code	Item Description	WareHouse Code	Required Qty.	
1	⇒ Transit Mixtures	Transit Mixtures	⇒ 01	2,000	
Transactions for Serial Number: <b>Transit Mixtures</b>					
Line No.	Item Code	Item Name	WareHouse Code	Serial Number	Quantity
1	⇒ Transit Mixtures	Transit Mixtures	⇒ 01	⇒ Transit_Mixtures_5	1

OK

**Figure Rental 3.17.1: Stock Transfer Report**

**The Reserve Serial Number Item Details options:**

- **Line No:** Line number of the item for which extension is created.
- **Item Code:** Item Code.
- **Item Description:** Item Description.
- **Warehouse code:** Rental warehouse.
- **Required Quantity:** Return date which at the time of extension.

**The Reserve Serial Number Transaction options:**

- **Line No:** Line number of the item for which extension is created.
- **Item Code:** Item Code.
- **Item Description:** Item Description.
- **Warehouse code:** Rental warehouse.
- **Serial Number:** Serial number reserved for the item.
- **Required Quantity:** Return date which at the time of extension.

**Vehicle Return Report**

The Vehicle Return Report would be visible on the Rental Order after processing. It shows information about the stock transfers which are created during Rental Order processing.



Line No.	Item Code	Item Description	WareHouse Code	Required Qty.	Vehicle Return Qty.	Return Reason
1	Diesel Pumpset	Diesel Pumpset	01	1.000	1.000	No Reason

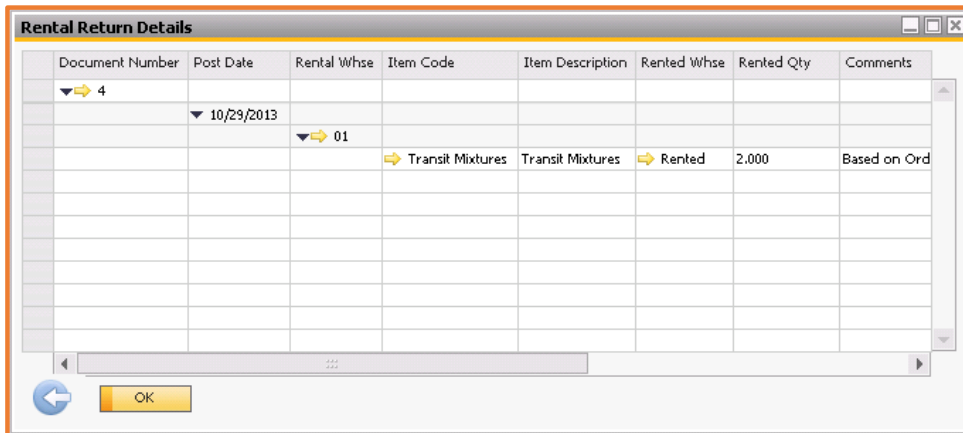
**Figure Rental 3.18.1: Vehicle Return Report**

**The Vehicle Return Details options:**

- **Line No.:** Line number of the Rental Order.
- **Item Code:** Item code on the rental return.
- **Item Description:** Item description.
- **Warehouse Code:** Warehouse code.
- **Required Quantity:** Required quantity.
- **Vehicle Return Quantity:** Vehicle Return Quantity.
- **Return Reason:** Comments on the Rental Order.

**Rental Return Details**

The Displays Rental Return details on the Rental Order, this will display the option in context menu if rental return is created for the Rental Order.



Document Number	Post Date	Rental Whse	Item Code	Item Description	Rented Whse	Rented Qty	Comments
4	10/29/2013	01	Transit Mixtures	Transit Mixtures	Rented	2,000	Based on Ord

**Figure Rental 3.19.1: Rental Return Details**

### The Vehicle Return Details options:

- **Document Number:** Rental return document number.
- **Posting Date:** Posting date of the rental return.
- **Rental Warehouse:** Rental warehouse.
- **Item Code:** Item code on the rental return.
- **Item Description:** Item description.
- **Rented Warehouse:** Rented warehouse.
- **Rented Quantity:** Rented quantity.
- **Comment:** Comments on the rental return.
- **Repair Warehouse:** Repair warehouse.
- **Repair Quantity:** Repair item quantity.
- **Returned Quantity:** Returned item quantity.
- **Consumed Quantity:** Consumed item quantity.
- **Balance Quantity:** Balance remaining quantity.

### Toolbox operations on Rental Order Report



**Figure Rental 3.20.1 Rental Order Report**

The Print Preview, Print and Email tools can be used for Reserve Serial Number Report.

## Rental Order Document

<b>OEC Computers - Rental</b>		VAT No:	US65-900637
1901 Maynesboro Drive Suite 200 New York -19065 New York, USA		Phone :	(610) 768-7465
		Fax:	(610) 948-9384
<b>Rental Order</b>			
<b>Customer:</b> Norm Thompson		<b>Order:</b>	32
<b>Invoice Address</b> 208 Hollywood Ave Los Gatos CA 95030 USA		Date :	03/13/2014
		Our Ref:	
		Your Ref:	Norm Thompson
		Ref no:	
		Currency:	\$
		Customer no :	C20000
		Delivery Address:	300 Billings Drive Suite 500 Havertown, PA 19083 USA
Payment :	2P10Net30	Page 1 of 2	

Item No	Description	Quantity	Rental Days	Price	Amount
Diesel Pumpset	Diesel Pumpset	1.00	1	\$ 100.00	100.00

<b>Rental Period:</b>				Order :	\$ 100.00
Start Date :	19/02/2014	End Date :	19/02/2014	Discount :	\$ 0
Ship Date :	19/02/2014	Return Date :	19/02/2014	Additional Exp. :	\$ 0
				VAT :	\$ 6.00
				<b>Total :</b>	<b>\$ 106.00</b>

Figure Rental 3.21.1 Rental Order Report

### The Rental Order Document Report options:

- **Vat No:** VAT No. given on the rental quotation.
- **Phone:** Phone no of the contact person.
- **Fax:** Fax of the contact person.
- **Order:** Rental quotation number.
- **Date:** Rental document date.
- **Our Ref:** Owner of the rental quotation.



- **Your Ref:** Contact person selected on the rental quotation.
- **Ref No:** Number at card on the rental quotation.
- **Currency:** Currency of the rental quotation.
- **Customer No:** Customer No.
- **Customer:** Customer Name.
- **Invoice Address:** Invoice address.
- **Payment:** Payment method selected on the document.
- **Address:** Address of the customer.
- **Item No:** Item code for which quotation is created.
- **Description:** Item description for which quotation is created.
- **Quantity:** Quantity of the item.
- **Rental Days:** Total rental days.
- **Price:** Price of the item.
- **Amount:** Amount of the line item.
- **Start Date/End Date:** Start date of the rental quotation.
- **Ship Date/Return Date:** End date of the rental quotation.
- **Order Balance:** Order balance of the customer.
- **Discount:** Discount on the item.
- **Additional Exp.:** Additional expense on the rental quotation.
- **Vat Amount:** Vat amount on the line item.

## Rental Order Pick List

Page 1 of 1

### Order Picklist

**OEC Computers - Rental**

**Business Partner** Norm Thompson  
**Contact Person** Norm Thompson  
**Contact No** (610) 565-9000  
**Fax** (610) 565-9032  
**Customer Ref. no. :**

**Bill To** 300 Billings Drive  
 Suite 500  
 Havertown, PA 19083

**Ship To** 300 Billings Drive  
 Suite 500  
 Havertown, PA 19083

**Order:** 32  
**Project Code**  
**Project**  
**Start Date** 02/19/2014 **End Date** 02/19/2014  
**Shipping Date** 02/19/2014 **Return Date** 02/19/2014  
**Currency** \$

Line Num	Item No	Description	Quantity	Amount
1	Diesel Pumpset	Diesel Pumpset	1.00	\$ 100.00

**Reserved Serial No**

<u>SerialNo</u>	<u>Whse</u>
Diesel_Pumpset_7	01

Figure Rental 3.22.1 Rental Order Pick List Report

**The Rental Order Pick List Document options:**

- **Business Partner:** Business partner name.
- **Contact Person:** Contact person name.
- **Contact No:** Contact no. of the contact person.
- **Fax:** Fax number.

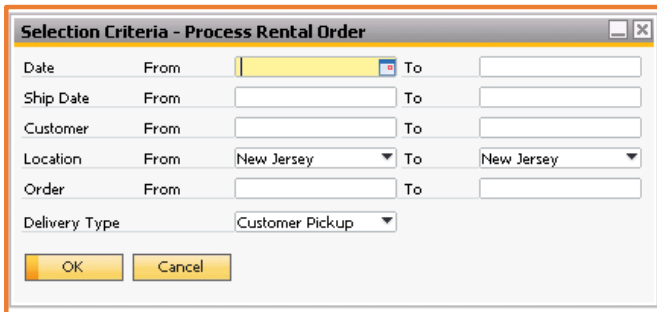


- **Customer Ref No:** Customer reference number.
- **Bill To:** Bill to address.
- **Ship To:** Ship to address.
- **Order:** Rental order document number.
- **Project Code:** Project code of the document.
- **Project:** Project Name.
- **Start/End Date:** Start date of the Rental Order.
- **Shipping/Return Date:** Return date of the Rental Order.
- **Currency:** Currency of the Rental Order.
- **Line No:** Line number of the item.
- **Item No:** Item number on the line.
- **Description:** Item description.
- **Quantity:** Quantity of item on the line.
- **Amount:** Amount of the item on the line.
- **Reserved Serial No:** Serial numbers which are reserved on the Rental Order.
- **Warehouse:** Warehouse in which the serial are currently stored.



## Working with the Process Rental Order form

The Process Rental Order module consists of three forms that help to process the Rental Orders, manage partial deliveries and with the selecting of items which are to be rented. The user can select the individual form in order to process them. After processing the Rental Order a stock transfer of all rental items from the respective rental warehouse to the rented warehouse is performed.



**Figure Rental 4.1: Selection Criteria – Process Rental Order**

The various fields in the Process Rental Order form are as follows:

- **Date:** Enter the date / range on which you wish to process the Rental Order.
- **Customer From / To:** Select the customer number / range as defined in the Business Partner Master Data (this is to specify only those customers you wish to invoice).
- **Location:** Select the location / range as mapped against the owner(s) in Rental Order
- Delivery Type:** Select the type of delivery (either Direct or Vehicle) for the Rental Order (s) to be processed.

## Defining the Process Rental Order Form

The Process Rental Order form helps to select the Rental Orders which are required to be processed. Figure Rental 4.1.1 displays the Process Rental Order form:

#	Select	Customer	Name	Document No.	Document Date	Ship Date	Invoice	Invoice Date	Invoice Time
1	<input type="checkbox"/>	485500	John Deere	2	04/17/15	04/17/15	<input type="checkbox"/>		
2	<input type="checkbox"/>	470000	Amazon	22	09/03/15	09/03/15	<input type="checkbox"/>		
3	<input type="checkbox"/>	C109	ABC Ltd	12	09/01/15	09/01/15	<input type="checkbox"/>		
4	<input type="checkbox"/>	C109	ABC Ltd	17	09/02/15	09/02/15	<input type="checkbox"/>		
5	<input type="checkbox"/>	C109	ABC Ltd	20	09/02/15	09/02/15	<input type="checkbox"/>		
6	<input type="checkbox"/>	C109	ABC Ltd	23	09/03/15	09/03/15	<input type="checkbox"/>		
7	<input type="checkbox"/>	C10987	XYZ PVT LTD	30	09/16/15	09/16/15	<input type="checkbox"/>		
8	<input checked="" type="checkbox"/>	C10987	XYZ PVT LTD	35	10/09/15	10/09/15	<input checked="" type="checkbox"/>	10/09/15	

Figure Rental 4.1.1: Process Rental Order

## Defining the General Area

The General area of the Process Rental Order form consists of the following fields:

- **Process Date:** The date on which the Rental Order is going to be processed. By default it picks up the current date.
- **Process:** After selecting one of the orders to process you need to click the Process button to begin processing the order.
- **Cancel:** In order to cancel the processing and move out of this screen please click the Cancel button.
- **Delivery No:** It's an auto generated number to uniquely identify each delivery, required to keep a track of deliveries for Delivery Management.



- **Ship Date:** Depicts the ship date of the Rental Order.
- **Invoice:** Click this to create the invoice of the Rental Order.

Invoice Date: Depicts the creation date of the invoice, by default the invoice date will be the current date but it can be modified.

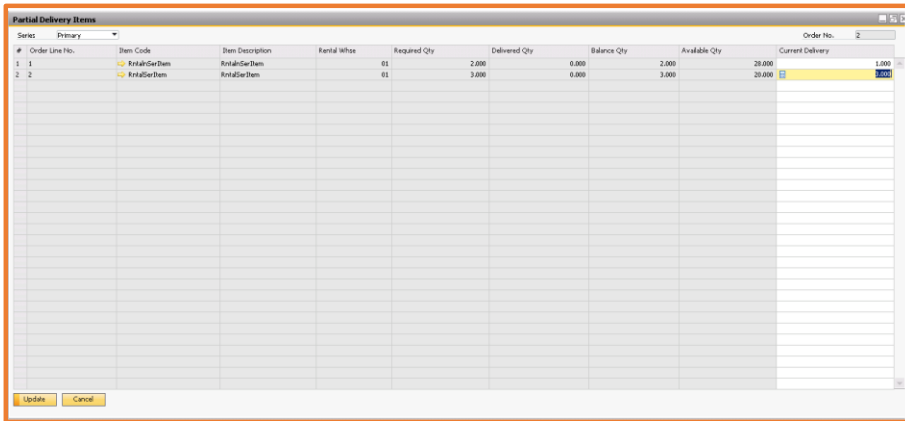
### Defining the Grid Section

The Grid Section of the Process Rental Order form consists of the following options:

- **Select:** Used to select the order which needs to be processed. Please note that only one Rental Order can be processed at one time.
- **Document No:** Number of the Rental Order. The number is automatically assigned by the system
- **Document Date:** The date the original document was generated.
- **Customer Code:** Displays the customer reference number as defined in the Business Partner Master Data.
- **Customer Name:** Displays the name of the customer as defined in the Business Partner Master Data.

### Defining the Partial Delivery of Items

This screen is used in case a partial delivery needs to be made. The Partial Delivery Items form helps to manage multiple deliveries of a single rented item. Figure Rental 4.4.1 displays the Partial Delivery Items:



Order Line No.	Item Code	Item Description	Rental Wk	Required Qty	Delivered Qty	Balance Qty	Available Qty	Current Delivery
1	RentalSerItem	RentalSerItem	01	2,000	0,000	2,000	20,000	1,000
2	RentalSerItem	RentalSerItem	01	3,000	0,000	3,000	20,000	3,000

**Figure Rental 4.4.1: The Partial Delivery Items**

### Defining the General Area

The General Area of the Partial Delivery Items form consists of the following fields:

- **Series:** By default the system shows the primary series as the series for the inventory transfer which would be generated after processing the Rental Order. If required, it can be changed.
- **Order No:** Displays the order number of the Rental Order which is going to be processed.
- **Update:** After selecting the delivery quantities click the update button. In case the order contains serialized items, the serial number selection screen will open. In case of non-serialized items an inventory transaction will be created affecting the rental and rented warehouses. And if the Service Contract is marked on Rental Order then the system will create a service contract document for that customer.
- **Cancel:** Click the cancel button to cancel the selection and move out of the screen.

### Defining the Grid Section

The various fields in the Grid Section of the Partial Delivery Items form are as follows:

- **Order Line No.:** Lists the number of the line item.



- **Item code:** Displays the number of the item as defined in the Item Master data.
- **Item Description:** Displays the description of the item as defined in the Item Master data.
- **Rental Warehouse:** Code number of the warehouse from where the items will be rented.
- **Required Quantity:** Enter the quantity for the item required by the customer.
- **Delivered Quantity:** Enter the quantity for the item delivered till date to the customer against the same order.
- **Balance Quantity:** Enter the quantity for the item yet to be delivered to the customer against the same order.
- **Available Quantity:** Shows the available quantity for the item in the selected rental warehouse.
- **Current Delivery:** Enter the quantity for the item for the order for current shipment.

### **Defining the Serial Number Selection**

The Serial Number Selection form contains the fields to specify the information related to the serial number. Figure Rental 4.7.1 displays the Serial Number Selection form:

**Figure Rental 4.7.1: The Serial Number Selection – Delivery**

### Defining the General Area

The various fields in the General Area of the Serial Number Selection form are as follows:

- **Update:** After selecting the serial numbers Update button needs to be clicked to update the system with information.
- **Cancel:** Click the cancel button to cancel the selection and move out of the screen.
- **Auto Select:** Click this button to let the system select the Serial Numbers of items to be shipped to the customer against the order.
- **Find:** Use this field to search for a specific serial number from the available list. Enter the full or partial serial number of the desired item and tab out of the field to begin search.

- **Available Quantity:** Displays the available quantity for the selected rental item in the Rental warehouse. This field is non-editable.
- **Total Selected:** This field shows the total quantity selected so far.

### Defining the Grids in the Serial Number Selection form

The grid lists all the line items from the Rental Order. The various fields in the Rows from Documents grid are as follows:

- **Item No.:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Warehouse Code:** Displays the warehouse from which items should be transferred to rented warehouse.
- **Quantity:** Displays the quantity of the rental item required by the customer.
- **Total Selected:** This field shows the total quantity selected so far.
- **Open Quantity:** Displays the deliverable quantity for which serial numbers should be selected.

This grid lists all available serial numbers of the selected item in the Rows from Document grid. The various fields in the Available Serial Numbers grid are as follows:

- **Serial Number:** The column contains a list of all available serial numbers of the selected item. Please select item which to attach to the order and transfer them to Selected Serial Number list by using the button the > symbol to the right of the grid.

This grid lists all available serial numbers of the selected item in the Rows from Document grid.

- **Serial Number:** Contains a list of serial numbers selected from the available serial numbers list.

### Processing the Rental Order

This menu item opens the “Process Rental” order selection criteria form and other related screens to assist in processing Rental Orders. The process Rental Order form is used to process



open Rental Orders. After processing a rental order, the status of the order changes from “Open” to “Rented” and a stock transfer takes place from rental warehouse to rented warehouse. Use this screen to:

- Process Rental Order.
- Manage delivery including selecting items for delivery.
- In order to process an open Rental Order you need to select Process Rental Order menu option from the Rental menu. This will open the Selection Criteria – Process Rental Order form.

Let’s perform the following steps to specify the selection criteria in the Process Rental Order form:

1. Enter the date for which you wish to process Rental Order / Orders.
2. Enter the Customer / Customers.
3. Enter the Location / Locations.
4. Select the “Delivery Type”.
5. Click OK.

**Note:** Please note there is no inventory movement of rental items at this stage for vehicle deliveries. This will be handled through the Delivery Management screen.

The screen lists all open or partially delivered orders as of the day. The Process Date field contains the system date and is non-editable. The grid contains all open orders as of the Process Date.

**Note:** Please note that you can only process one order at a time.

Let’s perform the following steps to process Rental Order:

1. To begin processing an order, please check the box in the first column of the row containing the order that needs to be processed.





2. Click the Process button in the screen.

This opens the “Partial Delivery Items” screen. Here you can select whether if you want to deliver the full order or a partial order to the customer. Please enter the desired quantities to be delivered.

3. **Serialized Items:** In case the order contains serialized items, a “Serial Number Selection – Delivery” screen – Delivery will open. Please follow the process defined in step 7.

4. **Non Serialized Items:** In case the order contains only non-serialized items, an inventory transaction will be created affecting the rental and rented warehouses and the order will be processed.

5. In case both serialized and non-serialized items are present the Serial Number Selection screen will open to further process serialized items.

6. In the “Serial Number Selection – Delivery” screen please select an item from the “Rows from Document” grid. This will display list of serial numbers for the item selected in the “Available Serial Numbers” grid.

7. To select serial numbers to be delivered there are two options:

- a. You can either click the “Auto Select” button to auto select the serial numbers to be delivered.
- b. The second option is to manually select the serial numbers from the “Available Serial Numbers” grid to “Selected Serial Numbers” grid. Please select an item and use the “>” button to transfer.

8. Repeat the process for all serialized items in the “Rows from Document” grid. Once finished click the Update button.

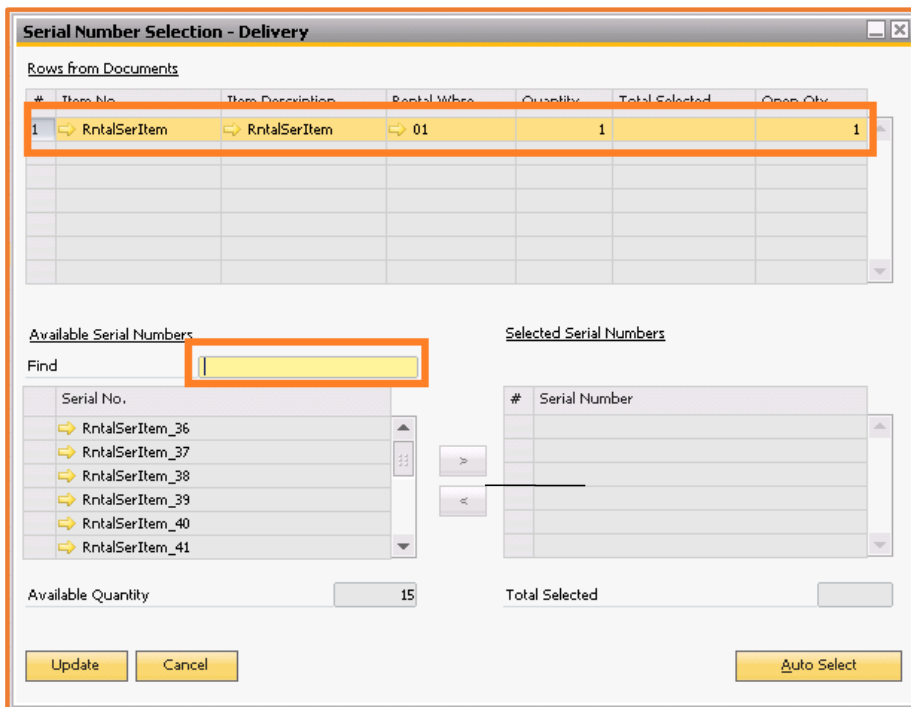
You will now be transferred back to “Partial Delivery Items” screen. Please click on the Update button to complete processing the Rental Order.

### **Serial Number Scanning Functionality**

This functionality allows user to scan and feed Serial Number of the Item(s) to the “Serial Number Selection –Delivery” screen while processing the Rental Order.

The User needs to perform the following steps for Serial Number Scanning Functionality:

1. Place the cursor in the Find field.
2. Scan the serial number which is to be delivered.
3. After the serial number gets scanned, the relevant Item No in the “Rows from Documents” section of the screen will automatically get selected.
4. Serial number of the Item scanned in the previous step automatically moves from “Available Serial Numbers” to the “Selected Serial Numbers” section.



**Figure Rental 4.11.1: The Serial Number Selection – Delivery**

**Identify serial number(s) to be covered in service contact**

The User can identify serial number(s) for which service to be provided. Service check box would be enabled only if service contract is chosen on the Rental Order.

**Serial Number Selection - Delivery**

Rows from Documents

#	Item No.	Item Description	Rental Whse	Quantity	Total Selected	Open Qty
1	RntalSerItem	RntalSerItem	01	1	1	0

Available Serial Numbers

Find

Serial No.
RntalSerItem_37
RntalSerItem_38
RntalSerItem_39
RntalSerItem_40
RntalSerItem_41
RntalSerItem_42

Available Quantity

Selected Serial Numbers

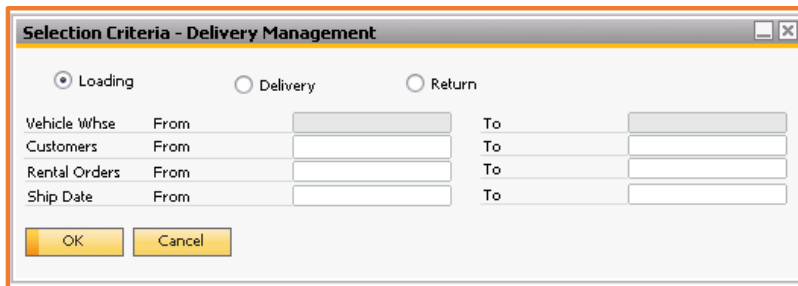
#	Serial Number	Service
1	RntalSerItem_36	<input checked="" type="checkbox"/>

Total Selected

### Working with Delivery Management

The Delivery management menu option opens the Delivery Management Selection Criteria form to process the vehicle deliveries. You can use the Delivery Management form to load the vehicles,

deliver the Rental Orders, and return the undelivered Rental Orders. The delivery management module consists of three forms to process the vehicle deliveries in the **Achieve One Rental** system. Users can decide the type of processing by selecting Loading, Delivery, or Return. The Delivery Management form is shown in Figure Rental 5.1:



**Figure Rental 5.1: Selection Criteria – Delivery Management**

The various fields in the Delivery Management form are as follows:

- **Loading, Delivery, and Return:** Select the delivery stage for the Rental Order.
- **Vehicle Warehouse From / To:** Enter the Vehicle Warehouse / range for the delivery of the rental item / s. This option will not be available for “Loading Delivery” Type.
- **Customer From / To:** Select the customer number / range as defined in the Business Partner Master Data.
- **Rental Order From / To:** Select the Rental Order number / range for which you wish to load the rental items.

### Delivery Management - Loading Screen

The delivery management loading screen is used to transfer rental items from the rental warehouse to the vehicle warehouse for the Rental Order / orders.

When you select the Loading option in the Delivery management Loading screen gets displayed, as shown in Figure Rental 5.1.1:

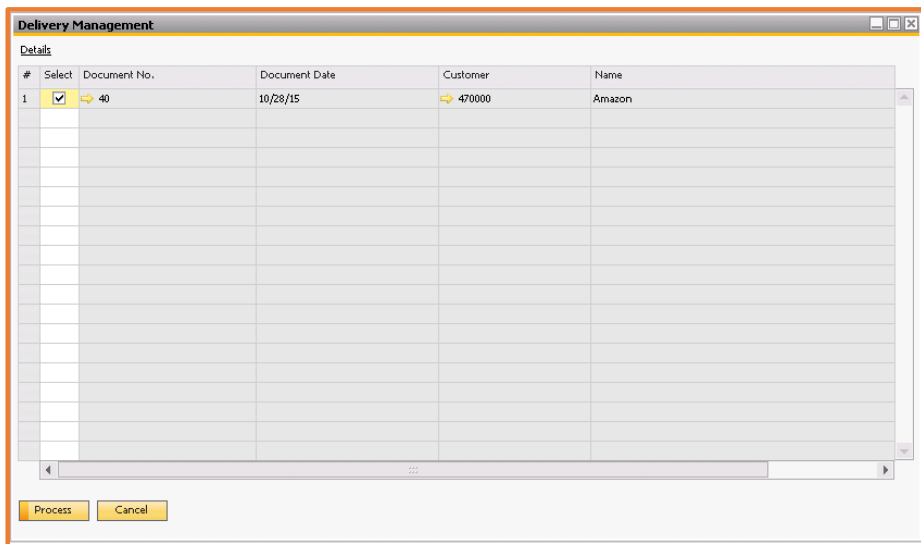


Figure Rental 5.1.1: Delivery Management – Loading

### Defining the General Area

The General Area of the Delivery Management Loading screen consists of the following fields:

- **Process:** After selecting one of the orders to load you need to click the Process button to begin processing the order.
- **Cancel:** In order to cancel the processing and move out of this screen please click the Cancel button.

### Defining the Grid Section

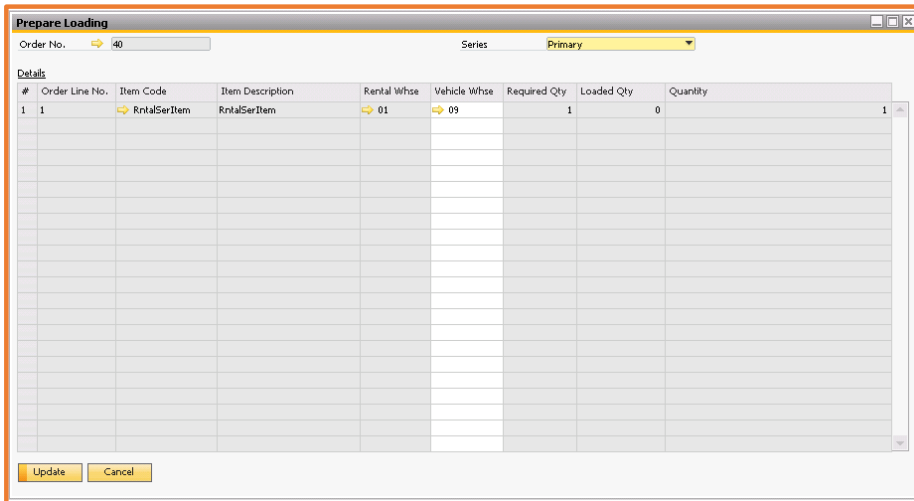
This grid lists all open Rental Orders which have a delivery type selected as “Vehicle Delivery” as of the given instance.

The various fields in the Grid Section are as follows:

- **Select Check Box:** The Select check box is used to select the order which needs to be loaded. Please note that only one Rental Order can be loaded at one time.
- **Document No:** Number of the Rental Order. The number is automatically assigned by the system.
- **Document Date:** The date the original document was generated.
- **Customer Code:** Displays the customer reference number as defined in the Business Partner Master Data.
- **Customer Name:** Displays the name of the customer as defined in the Business Partner Master Data.

### Working with the Prepare Loading form

The Prepare Loading form (Figure Rental 5.4) is used to identify the vehicle on which the rental items will be loaded for delivery. After updating, a stock transfer takes place from the rental warehouse to the vehicle warehouse.



The screenshot shows a window titled "Prepare Loading". At the top, there is a field for "Order No." with the value "40" and a "Series" dropdown menu set to "Primary". Below this is a "Details" section containing a table with the following columns: #, Order Line No., Item Code, Item Description, Rental Whse, Vehicle Whse, Required Qty, Loaded Qty, and Quantity. The first row of data shows: # 1, Order Line No. 1, Item Code RntalSerItem, Item Description RntalSerItem, Rental Whse 01, Vehicle Whse 09, Required Qty 1, Loaded Qty 0, and Quantity 1. At the bottom of the window, there are "Update" and "Cancel" buttons.

#	Order Line No.	Item Code	Item Description	Rental Whse	Vehicle Whse	Required Qty	Loaded Qty	Quantity
1	1	RntalSerItem	RntalSerItem	01	09	1	0	1

**Figure Rental 5.4.1: The Prepare Loading**

### **Defining the General Area**

The General Area of the Prepare Loading Screen consists of the following fields:

- **Order No:** Displays the order number of the Rental Order which is going to be loaded.
- **Series:** By default the system shows the primary series as the series for the inventory transfer which would be generated after loading the Rental Order. If required, it can be changed.
- **Update:** After validating the loading quantities click the update button.
- **Cancel:** Click the cancel button to cancel the selection and move out of the screen.

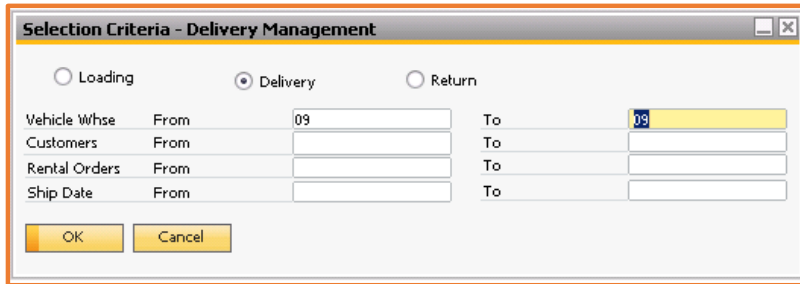
### **Defining the Grid Section**

The section lists all line items related to the particular order:

- **Order Line No.:** Lists the number of the line item.
- **Item Code:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Vehicle Warehouse:** Code number of the vehicle warehouse to which the rental item / items is going to be loaded.
- **Required Quantity:** Validate the quantity for the item required by the customer.
- **Delivered Quantity:** Validate the quantity for the item for the order for Delivering.
- **Loaded Quantity:** Validate the quantity for the item for the order for Loading.
- **Return Quantity:** Validate the quantity for the item for the order for Returning.

### **Selection Criteria - Delivery Management**

The Selection Criteria - Delivery management form (Figure Rental 5.7.1) helps to specify the information of the delivery of the items.



**Selection Criteria - Delivery Management**

Loading   
  Delivery   
  Return

Vehicle Whse	From	<input type="text" value="09"/>	To	<input type="text" value="09"/>
Customers	From	<input type="text"/>	To	<input type="text"/>
Rental Orders	From	<input type="text"/>	To	<input type="text"/>
Ship Date	From	<input type="text"/>	To	<input type="text"/>

**Figure Rental 5.7.1: Selection Criteria – Delivery Management - Delivery**

The various fields in the Delivery Management form are as follows:

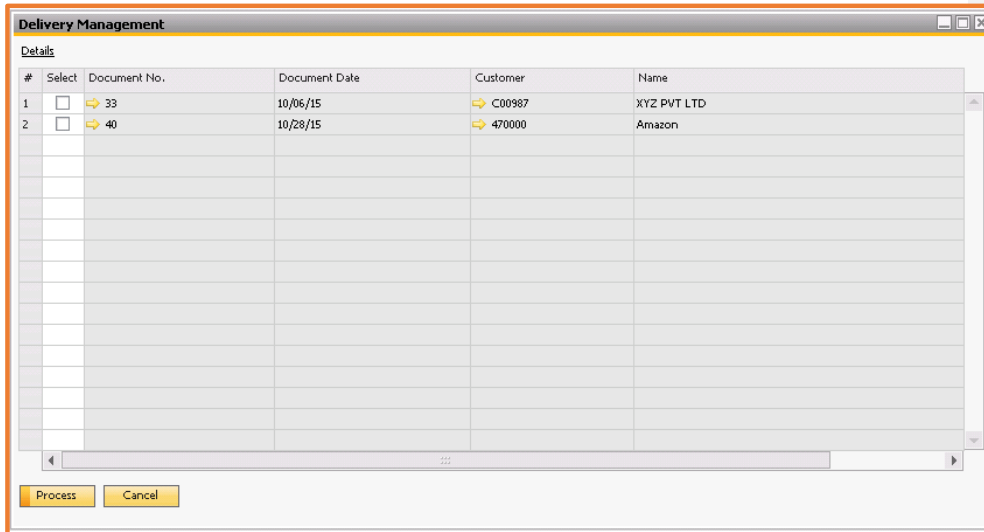
- **Loading, Delivery and Return Radio Buttons:** Select the delivery stage for the Rental Order.
- **Vehicle Warehouse From / To:** Enter the Vehicle Warehouse / range for the delivery of the rental item / s.
- **Customer From / To:** Select the customer number / range as defined in the business partner master data.

Rental Order From / To: Select the Rental Order number / range for which you wish to deliver the rental items.

### **Delivery Management - Delivery Screen**

The delivery management delivery screen is used to transfer rental items from the vehicle warehouse to the rented warehouse for the Rental Order(s). When you select the Delivery option, the Delivery management Delivery screen gets displayed, as shown in Figure Rental 5.8.1:





**Figure Rental 5.8.1: Delivery Management – Delivery**

### Defining the General Area

The General area of the Delivery Management Delivery screen consists of the following options:

- **Process:** After selecting one of the orders to be delivered you need to click the Process button to begin processing the order.
- **Cancel:** In order to cancel the processing and move out of this screen please click the Cancel button.

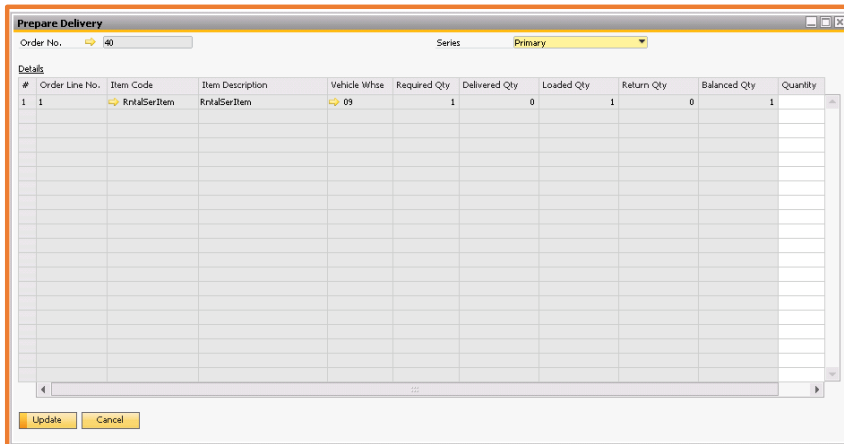
### Defining the Grid Section

This grid lists all open Rental Orders which have a delivery type selected as Vehicle Delivery as of the given instance. The various fields in the Grid Section of the Delivery Management form are as follows:

- **Select Check Box:** The Select check box is used to select the order which needs to be delivered. Please note that only one Rental Order can be processed at one time.
- **Document No:** Number of the Rental Order. The number is automatically assigned by the system.
- **Document Date:** The date the original document was generated.
- **Customer Code:** Displays the customer reference number as defined in the Business Partner Master Data.
- **Customer Name:** Displays the name of the customer as defined in the Business Partner Master Data.

### Defining the Prepare Delivery form

The Prepare Delivery form (Figure Rental 5.11.1) is used to identify the vehicle on which the rental items will be loaded for delivery. After updating, a stock transfer takes place from the rental warehouse to the vehicle warehouse.



#	Order Line No.	Item Code	Item Description	Vehicle Whse	Required Qty	Delivered Qty	Loaded Qty	Return Qty	Balanced Qty	Quantity
1	1	RntaSerItem	RntaSerItem	09	1	0	1	0	1	

**Figure Rental 5.11.1: Prepare Delivery**

## Defining the General Area

The various fields in the General Area of the Prepare Delivery form are as follows:

- **Order No:** Displays the order number of the Rental Order which is going to be delivered.
- **Series:** By default the system shows the primary series as the series for the inventory transfer, which would be generated after delivering the Rental Order. If required, it can be changed.
- **Update:** After validating the delivery quantities click the update button.
- **Cancel:** Click the cancel button to cancel the selection and move out of the screen.

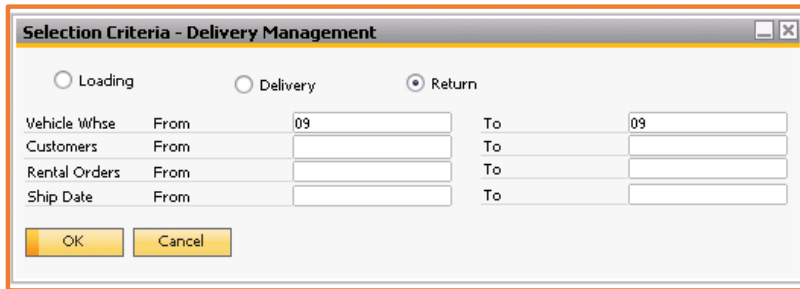
## Defining the Grid Sections

The various fields in the Grid Section of the Prepare Delivery form are as follows:

- **Order Line No.:** Lists the number of the line item.
- **Item Code:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Vehicle Warehouse:** Code number of the vehicle warehouse from which the rental item / items is going to be delivered to the rented warehouse.
- **Required Quantity:** Validate the quantity for the item required by the customer.
- **Delivered Quantity:** Validate the quantity for the item already delivered to the customer, if any.
- **Loaded Quantity:** Validate the quantity for the item for the order for Loading.
- **Returned Quantity:** Validate the quantity for the item that has been returned from the customer, if any.
- **Balanced Quantity:** Represents the remaining quantity of the rental delivery.
- **Quantity:** Displays the quantity for the item for the order for return.
- **Return Reason:** Mention the reason for return, if any.

## Defining the Delivery Management - Return Screen

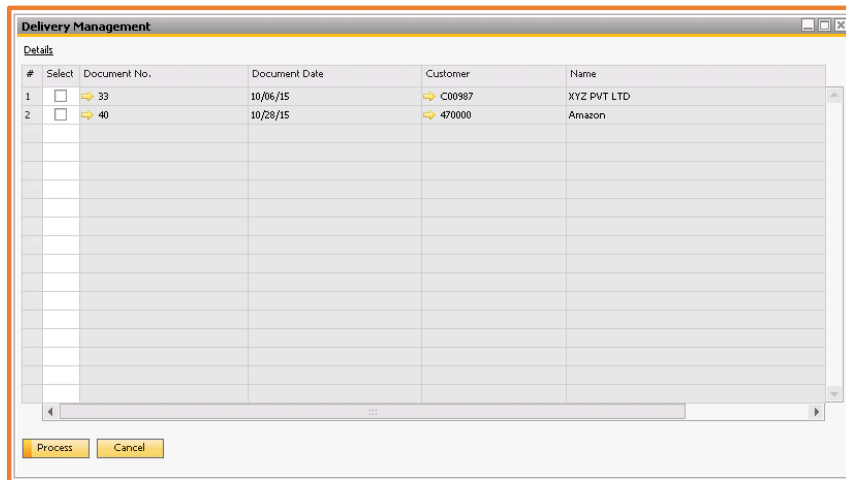
The Delivery Management Return screen is used to return the undelivered Rental Orders. When you select the Return menu option, the Delivery management Return screen gets displayed (Figure Rental 5.14.1).



**Figure Rental 5.14.1: Selection Criteria – Delivery Management – Return**

The various fields in the Delivery Management Return screen are as follows:

- **Loading, Delivery and Return Radio Buttons:** Select the delivery stage for the Rental Order.
- **Vehicle Warehouse From / To:** Enter the Vehicle Warehouse / range for the return of the rental items.
- **Customer From / To:** Select the customer number / range as defined in the Business Partner Master Data.
- **Rental Order From / To:** Select the Rental Order number / range for which you wish to return the rental items.
- **Delivery Management Return form:** (Figure Rental 5.14.2) is used to transfer rental items from the vehicle warehouse to the rental warehouse for the Rental order(s).



**Figure Rental 5.14.2: Delivery Management – Return**

### Defining the General Area

The various fields in the General Area of the Delivery Management Return form are as follows:

- **Process:** After selecting one of the orders to return you need to click the Process button to begin processing the order.
- **Cancel:** In order to cancel the processing and move out of this screen please click the Cancel button.

### Defining the Grid Section

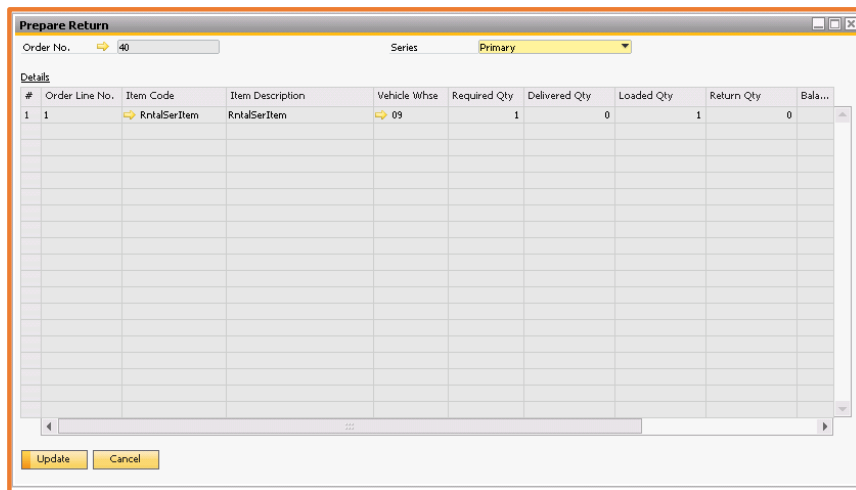
The various fields in the Grid Section of the Delivery Management Return screen are as follows:

- **Select:** The Select check box is used to select the order which needs to be processed. Please note that only one Rental Order can be processed at one time.
- **Document No:** Number of the Rental Order. The number is automatically assigned by the system.

- **Document Date:** The date the original document was generated.
- **Customer:** Displays the customer reference number as defined in the Business Partner Master Data.
- **Name:** Displays the name of the customer as defined in the Business Partner Master Data.

### Defining the Prepare Return

The Prepare Return form (Figure Rental 5.17.1) is used to identify the vehicle from which the rental items will be returned. After updating, a stock transfer takes place from the vehicle warehouse to the rental warehouse.



#	Order Line No.	Item Code	Item Description	Vehicle Whse	Required Qty	Delivered Qty	Loaded Qty	Return Qty	Bala...
1	1	RntalSerItem	RntalSerItem	09	1	0	1	0	

Figure Rental 5.17.1: Prepare Return

### Defining the General Area

The various fields in the General Area of the Prepare Return fields are as follows:

- **Order No:** Displays the order number of the Rental Order which is going to be returned.

- **Series:** By default the system shows the primary series as the series for the inventory transfer, which would be generated after returning the Rental Order. If required, it can be changed.
- **Update:** After validating the return quantities click the update button.
- **Cancel:** Click the cancel button to cancel the selection and move out of the screen.

### Defining the Grid Section

The section lists all line items related to the particular order, which are described as follows:

- **Order Line No.:** Lists the number of the line item.
- **Item Code:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Vehicle Warehouse:** Code number of the vehicle warehouse from which the rental item / items is going to be return to the rented warehouse.
- **Required Quantity:** Validate the quantity for the item required by the customer.
- **Delivered Quantity:** Validate the quantity for the item already delivered to the customer, if any.
- **Loaded Quantity:** Represents the quantity loaded to return.
- **Returned Quantity:** Validate the quantity for the item that has been returned from the customer, if any.
- **Balanced Quantity:** Represents the remaining quantity of the rental return.
- **Quantity:** Displays the quantity for the item for the order for return.
- **Return Reason:** Mention the reason for return, if any.

### Processing the Vehicle Deliveries

In order to process an open Rental Order for delivery you need to select Delivery Management menu option in the Rental menu. This will open the Selection Criteria – Delivery Management form.

## Loading the Rental Items

Let's perform the following steps to load a Rental Order:

1. Select Loading option from the radio button.
2. Enter the Customer / Customers.
3. Enter the Rental Order / Orders.
4. Click OK.

The screen lists all processed orders as of the day.

**Note:** Please note that you can only load one order at a time.

5. To begin loading an order, please check the box in the first column of the row containing the order that needs to be loaded.
6. Click the Process button in the screen.
7. This opens the "Prepare Loading" screen. Validate the Vehicle Whse. If required, this can be changed.
8. Validate the series in the general section. By default the system shows the primary series as the series for the inventory transfer, which would be generated after delivering the Rental Order. If required, it can be changed.

## Delivering the Rental Items

Let's perform the following steps to deliver a Rental Order:

1. Select Delivery option from the radio button.
2. Enter the Vehicle Warehouse / range for the delivery of the rental item / s.
3. Enter the Customer / Customers.
4. Enter the Rental Order / Orders.
5. Click OK.

The screen lists all loaded orders as of the day.





**NOTE:** Please note that you can only process one delivery for a Rental Order at a time.

6. To deliver an order, please check the box in the first column of the row containing the order that needs to be delivered.

7. Click the Process button in the screen.

8. This opens the “Prepare Delivery” screen. Validate the Quantity to be delivered. If required, this can be changed.

9. Validate the series in the general section. By default the system shows the primary series as the series for the inventory transfer which would be generated after delivering the Rental Order. If required, it can be changed.

10. **Serialized Items:** After updating, in case the order contains serialized items, a “Serial Number Selection – Delivery” screen will open. Please follow the process defined in Step 13.

11. **Non Serialized Items:** In case the order contains only non-serialized items, an inventory transaction will be created affecting the vehicle and rented warehouses and the order will be processed for delivery.

12. In case both serialized and non-serialized items are present the Serial Number Selection screen will open to further process serialized items.

13. In the “Serial Number Selection – Delivery” screen please select an item from the “Rows from Document” grid. This will display list of serial numbers for the item selected in the “Available Serial Numbers” grid.

14. To select serial numbers to be delivered there are two options:

- You can either click the “Auto Select” button to auto select the serial numbers to be delivered.
- The second option is to manually select the serial numbers from the “Available Serial Numbers” grid to “Selected Serial Numbers” grid. Please select an item and use the “>” button to transfer.

15. Repeat the process for all serialized items in the “Rows from Document” grid. Once finished click the Update button.

16. You will now be transferred back to “Prepare Delivery” screen. Please click on the Update button to complete processing the delivery for the Rental Order.



## Returning the Rental Items

Let's perform the following steps to return items on a Rental Order:

1. Select Return option from the radio button.
2. Enter the Vehicle Warehouse / range for the return of the rental item / s.
3. Enter the Customer / Customers.
4. Enter the Rental Order / Orders.
5. Click OK.

The screen lists all loaded orders as of the day.

**Note:** Please note that you can only return one Rental Order at a time.

6. To return an order, please check the box in the first column of the row containing the order that needs to be returned.
7. Click the Process button in the screen.
8. This opens the "Prepare Return" screen. Validate the Quantity to be returned. If required, this can be changed.
9. If required, mention the reason for return for the particular item / items.
10. Validate the series in the general section. By default the system shows the primary series as the series for the inventory transfer which would be generated after delivering the Rental Order. If required, it can be changed.
11. **Serialized Items:** After updating, in case the order contains serialized items, a "Serial Number Selection – Return Items" screen will open. Please follow the process defined in Step 14.
12. **Non Serialized Items:** In case the order contains only non-serialized items, an inventory transaction will be created affecting the vehicle and rental warehouses and the order will be processed for return.
13. In case both serialized and non-serialized items are present the Serial Number Selection screen will open to further process serialized items.



14. In the “Serial Number Selection – Return Items” screen please select an item from the “Rows from Document” grid. This will display list of serial numbers for the item selected in the “Available Serial Numbers” grid.

15. To select serial numbers to be delivered there are two options:

- You can either click the “Select All” button to auto select the serial numbers to be delivered.
- The second option is to manually select the serial numbers from the “Available Serial Numbers” grid to “Selected Serial Numbers” grid. Please select an item and use the “>” button to transfer.

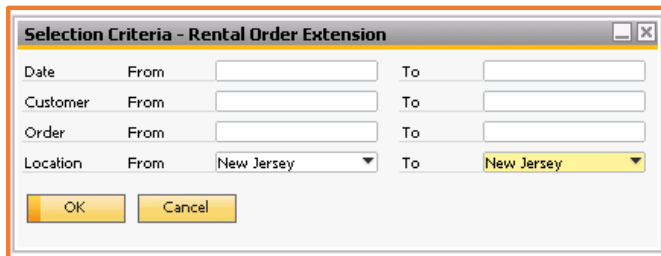
16. Repeat the process for all serialized items in the “Rows from Document” grid. Once finished click the Update button.

You will now be transferred back to “Prepare Return” screen. Please click on the Update button to complete processing the return for the Rental Order.

### **Rental Order Extension**

The Rental Order Extension menu option opens the Selection Criteria- Rental Order Extension form. The Rental Order Extension form helps to process the Rental Orders with the status set as Rented. The Rental Order Extension form is used to extend the rental period of an item on a Rental Order. You can use the Rental Order Extension form to load all the rented Rental Orders, and to extend the Rental Period. In order to extend the rented item period of an item on the rent order, you need to select the Rental Order Extension option in the Rental menu.

The Selection Criteria - Rental Order Extension form gets displayed, as shown in Figure Rental 6.1



**Figure Rental 6.1: Selection Criteria – Rental Order Extension**

The various fields in the Rental Order Extension form are as follows:

- **Date From / To:** Select the date / range for selecting the orders to be extended.
- **Customer From / To:** Select the customer number / range as defined in the Business Partner Master Data (this is to specify only those customers for which you wish to extend).
- **Order From / To:** Select the Rental Order number / range for which you wish to process the order.
- **Location From / To:** Select the location / range for selecting the orders on which you wish to extend items.

#### **Defining the Rental Order Extension Form**

- **Order No.:** Displays the Rental Order number / range for which you wish to process the extension.
- **Order Line No.:** Displays the line number / numbers of the Rental Order.
- **Customer:** Displays reference code of the customer.
- **Name:** Displays the name of the referred customer.
- **Item No.:** Displays the item number as defined in the Item Master Data.
- **Description:** Displays the item description as defined in the Item Master Data.
- **Start Date:** Display start date of an order.
- **End Date:** Display end date of an order.
- **Shipping Date:** Display shipping date of an order.

- **Return Date:** Display Return date of an order.
- **Quantity:** Display the quantity ordered for a given line item on order.
- **Service Contract:** Specifies whether service contract is required to be extended for the given line item.
- **Warranty:** Specifies whether warranty is required for the given line item.
- **Req. Quantity:** Specifies quantity of Item for which Rental Order Needs to be extended.

Rental Order Extension form has been shown in the Figure Rental 6.1.1

Select	Order No.	Order Line No.	Customer	Name	Item No.	Description	Start Date	End Date	Shipping Date	Return Date	Qty	Req. Qty
<input type="checkbox"/>	2	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/24/2013	11/24/2013	10/26/2013	11/24/2013	2.00	2.00
<input type="checkbox"/>	4	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/24/2013	10/24/2013	10/24/2013	10/24/2013	2.00	2.00
<input type="checkbox"/>	5	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/25/2013	10/25/2013	10/25/2013	10/25/2013	2.00	2.00
<input type="checkbox"/>	4	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/25/2013	10/25/2013	10/25/2013	10/25/2013	2.00	2.00
<input type="checkbox"/>	9	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/25/2013	10/25/2013	10/25/2013	10/25/2013	2.00	2.00
<input type="checkbox"/>	10	1	C20000	Norm Thompson	Wheel Loader	Wheel Loader	10/25/2013	10/25/2013	10/25/2013	10/25/2013	1.00	1.00
<input type="checkbox"/>	13	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/29/2013	11/29/2013	10/29/2013	11/29/2013	1.00	1.00
<input type="checkbox"/>	18	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/29/2013	10/29/2013	10/29/2013	10/29/2013	1.00	1.00
<input type="checkbox"/>	24	1	C30000	Microchips	Dumper	Dumper Trucks	02/10/2014	05/11/2014	02/10/2014	05/11/2014	1.00	1.00
<input type="checkbox"/>	25	1	C20000	Norm Thompson	Dumper	Dumper Trucks	02/17/2014	02/17/2014	02/17/2014	02/17/2014	1.00	1.00
<input type="checkbox"/>	25	2	C20000	Norm Thompson	Dumper	Dumper Trucks	02/17/2014	02/18/2014	02/17/2014	02/18/2014	1.00	1.00
<input type="checkbox"/>	27	1	C20000	Norm Thompson	Diesel Pumps	Diesel Pumps	02/15/2014	02/15/2014	02/15/2014	02/15/2014	1.00	1.00
<input type="checkbox"/>	28	1	C20000	Norm Thompson	Diesel Pumps	Diesel Pumps	02/19/2014	02/19/2014	02/19/2014	02/19/2014	1.00	1.00
<input type="checkbox"/>	31	1	C20000	Norm Thompson	Diesel Pumps	Diesel Pumps	02/19/2014	02/21/2014	02/19/2014	02/21/2014	1.00	1.00

Figure Rental 6.1.1: Process – Rental Order Extension form

### Processing Rental Order Extension

The “Return Date” is extendable on the Rental Order Extension if “Charges On” value on Rental Order is Ship Date. “End Date” is extendable on the Rental Order Extension if “Charges On” value on Rental Order is Rental Date (as shown in the Figure Rental 6.2.1).

**Rental Order**

Customer: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Contract Person: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Start Date: 10/01/15  
 Shipping Date: 10/01/15  
 Customer Ref. No.: \_\_\_\_\_  
 Price Contract: Daily-Daily-Daily

Document No.: 41  
 Status: Open  
 Posting Date: 10/01/15  
 Vald Until: 10/01/15  
 End Date: \_\_\_\_\_  
 Return Date: \_\_\_\_\_  
 Rental Whse: \_\_\_\_\_  
 Rented Whse: \_\_\_\_\_  
 Dropship Whse: \_\_\_\_\_  
 Local Currency: \_\_\_\_\_  
 Immediate Invoice  
 Reserved

Enable Alert  
 Week Days Billing  
 Process Order  
 Ship Date  
 Rental Date

Charges on: \_\_\_\_\_

Item No.	Item Description	Start Date	End Date	Shipping Date	Return Date	Start Time	No of Hours	Rental Whse	Available Qty	Required Qty	Open Qty	Rental Price	Discount %	Tax Code	Project
1	No								0.000	0.000	0.000		0.000		

Sales Employee: -No Sales Employee-  
 Owner: \_\_\_\_\_  
 Remarks: \_\_\_\_\_

Total Before Discount: \$ 0.00  
 % Discount: \$ 0.00  
 Add. Expense: \$ 0.00  
 Tax: \$ 0.00  
 Total: \$ 0.00

Buttons: Add, Cancel, Availability, Order Details, Copy From, Copy To

Immediate Invoicing: 10/01/15

**Figure Rental 6.2.1: Rental Order form**

The User needs to perform the following steps to process “Rental Order Extension” form:

1. Click on the “Rental Order Extension” option under the “Rental” menu.
2. Update the End Date/Return Date column as per requirement on the “Process - Rental Order Extension” form.
3. Click on the Process button.

Process - Rental Order Extension form has been shown in the Figure Rental 6.2.2

Select	Order No.	Order Line No.	Customer	Name	Item No	Description	Start Date	End Date	Shipping Date	Return Date	Qty	Req. Qty
<input type="checkbox"/>	2	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/24/2013	11/24/2013	10/24/2013	11/24/2013	2.00	2.00
<input type="checkbox"/>	4	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/24/2013	10/24/2013	10/24/2013	10/24/2013	2.00	2.00
<input type="checkbox"/>	5	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/25/2013	10/25/2013	10/25/2013	10/25/2013	2.00	2.00
<input type="checkbox"/>	6	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/25/2013	10/25/2013	10/25/2013	10/25/2013	2.00	2.00
<input type="checkbox"/>	9	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/25/2013	10/25/2013	10/25/2013	10/25/2013	2.00	2.00
<input type="checkbox"/>	10	1	C20000	Norm Thompson	Wheel Loader	Wheel Loader	10/25/2013	10/25/2013	10/25/2013	10/25/2013	1.00	1.00
<input type="checkbox"/>	13	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/28/2013	12/28/2013	10/28/2013	12/28/2013	1.00	1.00
<input type="checkbox"/>	18	1	C20000	Norm Thompson	Transit Mixer	Transit Mixtures	10/28/2013	10/28/2013	10/28/2013	10/28/2013	1.00	1.00
<input type="checkbox"/>	24	1	C30000	Microchips	Dumper	Dumper Trucks	02/10/2014	05/11/2014	02/10/2014	05/11/2014	1.00	1.00
<input type="checkbox"/>	25	1	C20000	Norm Thompson	Dumper	Dumper Trucks	02/17/2014	02/17/2014	02/17/2014	02/17/2014	1.00	1.00
<input type="checkbox"/>	25	2	C30000	Norm Thompson	Dumper	Dumper Trucks	02/17/2014	02/18/2014	02/17/2014	02/18/2014	1.00	1.00
<input type="checkbox"/>	27	1	C20000	Norm Thompson	Diesel Pumps	Diesel Pumps	02/18/2014	02/18/2014	02/18/2014	02/18/2014	1.00	1.00
<input type="checkbox"/>	28	1	C20000	Norm Thompson	Diesel Pumps	Diesel Pumps	02/19/2014	02/19/2014	02/19/2014	02/19/2014	1.00	1.00
<input type="checkbox"/>	31	1	C20000	Norm Thompson	Diesel Pumps	Diesel Pumps	02/19/2014	02/21/2014	02/19/2014	02/21/2014	1.00	1.00

Figure Rental 6.2.2: Process – Rental Order Extension form

### Rental Order after Extension

After the Rental Order extension “Extension History” menu option will be visible on Rental Order as shown in Figure Rental 6.3.1: Extension History.

The screenshot shows the 'Rental Order' window with a context menu open over the 'Rental Period' column of the table. The menu options are: Copy, Paste, Duplicate, Extension History (highlighted), and Stock Transfer Report.

**Customer Information:**  
 Customer: C20000  
 Name: Norm Thompson  
 Contact Person: Norm Thompson  
 Phone: (610) 565-9000  
 Start Date: 02/19/2014  
 Shipping Date: 02/19/2014  
 Customer Ref. No.:  
 Price Contract: Daily-Daily-Daily

**Document Information:**  
 Document No.: 31  
 Status: Rented  
 Posting Date: 02/19/2014  
 Valid Until: 03/21/2014  
 End Date: 02/21/2014  
 Return Date: 02/21/2014

**Charges on:**  Ship Date  Rental Date

#	Sell Item	Item No.	Item Description	Start Date	End Date	Shipping Date	Return Date	Rental Period	Rental W ...
1	No	→	Diesel Purr Diesel Pumpset	02/19/2014	02/21/2014	02/19/2014	02/21/2014	3	→ 01
2	No	▼							

**Sales Employee:** Sales Manager

**Owner:**

**Remarks:**

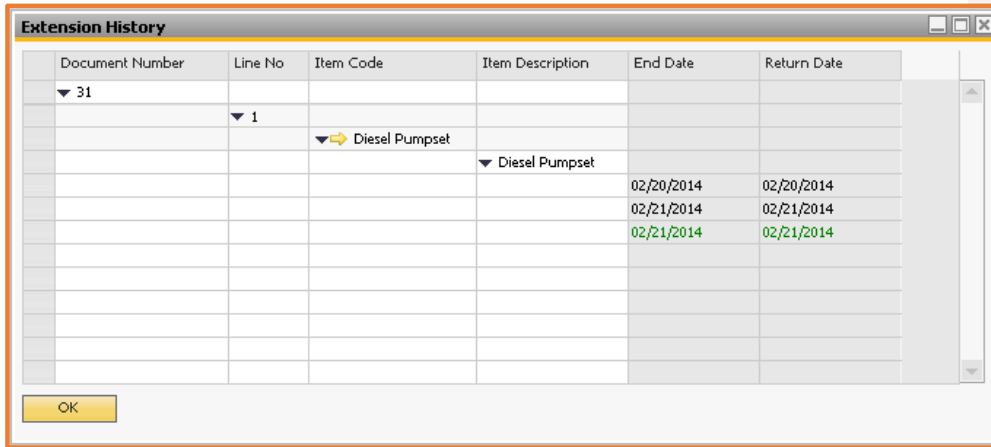
**Summary:**  
 Total Before Discount: \$ 300.00  
 % Discount: \$ 0.00  
 Add. Expense: → \$ 0  
 Tax: \$ 18.00  
 Total: \$ 318.00

Buttons: OK, Cancel, Availability, Order Details, Copy From, Copy To

Figure Rental 6.3.1: Extension History

Extension History will be displayed as shown in Figure Rental 6.3.2: Extension History, current end date and return dates would be displayed by green color.





Document Number	Line No	Item Code	Item Description	End Date	Return Date
▼ 31					
	▼ 1				
		▼ Diesel Pumpset			
			▼ Diesel Pumpset		
				02/20/2014	02/20/2014
				02/21/2014	02/21/2014
				02/21/2014	02/21/2014

OK

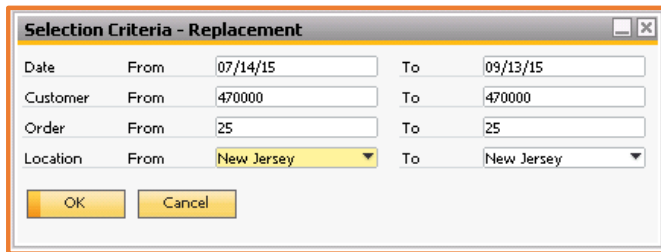
**Figure Rental 6.3.2: Extension History**

## Replacement

The Replacement menu option opens the Replacement Selection Criteria form to specify the information related to the replacement of the rental items. All the open and processed orders are available in the Replacement Selection Criteria form. You can use this screen to replace the serial number of an item at fault by a new available serial number. Items being replaced can be sent to Repair warehouse if the service contract for that order exists then user can able to generate service call for the item being sent for repairing by using service call process window. The Replacement menu helps to load all the processed Rental Orders, replace old serial number with new serial number, and Send the repairable item for servicing.

### Replacing an Item

In order to replace an item on an order you need to select Replacement menu option in the Rental menu. This will open the Selection Criteria – Replacement form (Figure Rental 7.1.1)



**Figure Rental 7.1.1: Selection Criteria – Replacement**

The various fields in the Selection Criteria Replacement form are as follows:

- **Date From / To:** Select the date / range to select the orders for replacement.
- **Customer From / To:** Select the customer number / range as defined in the Business Partner Master Data (this is to specify only those customers for whom you wish to perform replacement).
- **Rental Order From / To:** Select the Rental Order number / range for which you wish to perform replacement.
- **Location From / To:** Select the location / range to select orders for which you wish to perform replacement.

Let's perform the following steps to replace an ordered item:

1. Enter the date on which you wish to do the replacement.
2. Enter the Customer / Customers.
3. Enter the Rental Order / Orders.
4. Enter the Location / Locations.
5. Click OK button.

Serialized Item Rows, on orders having status rented and meeting the selection criteria, will get displayed in the Process Replacement form (Figure Rental 7.1.2).

Process Replacement													
Details													
#	Select	Order No.	Order Line No	Customer	Name	Item No	Description	Rented Whse	Rental Whse	Qty	Repair Whse	Repair Qty	Service Call
	<input type="checkbox"/>	2	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	2,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	3	1	C23900		Transit Mixtures	Transit Mixture	Rented	01	2,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	4	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	2,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	5	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	2,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	6	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	2,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	9	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	10	1	C20000		Wheel Loader	Wheel Loader	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	13	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	14	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	17	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	17	2	C20000		Transit Mixtures	Transit Mixture	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	18	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	18	2	C20000		Transit Mixtures	Transit Mixture	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	21	1	C20000		Transit Mixtures	Transit Mixture	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	24	1	C30000		Dumper	Dumper Trucks	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	25	1	C20000		Dumper	Dumper Trucks	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	25	2	C20000		Dumper	Dumper Trucks	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	26	1	C20000		Diesel Pumpset	Diesel Pumpset	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	27	1	C20000		Diesel Pumpset	Diesel Pumpset	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	28	1	C20000		Diesel Pumpset	Diesel Pumpset	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	29	1	C20000		Diesel Pumpset	Diesel Pumpset	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	30	1	C20000		Diesel Pumpset	Diesel Pumpset	Rented	01	1,000		0.000	<input type="checkbox"/>
	<input type="checkbox"/>	31	1	C20000		Diesel Pumpset	Diesel Pumpset	Rented	01	1,000		0.000	<input type="checkbox"/>

Figure Rental 7.1.2: Process – Replacement

### Defining the Process Replacement form

The various fields in the Process Replacement form are as follows:

- **Select:** To select the order lines which are required to be replaced.
- **Order No.:** Displays the Rental Order number / range for which you wish to process the replacement.
- **Order Line No.:** Displays the line number / numbers of the Rental Order.
- **Customer:** Displays the reference number of the customer.
- **Item No.:** Displays the item number as defined in the Item Master Data.
- **Description:** Displays the item description as defined in the Item Master Data.
- **Rented Warehouse:** Displays the rented warehouse.
- **Rental Warehouse:** Displays the rental warehouse.
- **Quantity:** Displays the quantity ordered for a given line item on an order.
- **Repair Warehouse:** Displays the repair warehouse.
- **Repair Quantity:** Identify how much quantity needs to be sent for repairing.
- **Service Call Check box:** Specify whether service call needs to be generated for the item send to repair on the selected line item of an order.

## Processing the Replacement

Let's perform the following steps to process the replacement of the items:

1. In the Process Replacement Screen, select the check boxes in the select column for the order line whose replacement is required.
2. If need to send the serial number replaced to repair warehouse then select repair warehouse and fill repair quantity in Rep.Qty column of the grid.
3. If replaced serial number is send for repair, valid service contract exists for the selected line item on an order and the service call is required to be generated for it then, select the Service Call check box.
4. Click Process button.
5. If repair warehouse is selected and repair quantity is filled then following two Serial Number selection windows gets open:
  - **Serial number selection - Repair:** To select the serial number to be send to repair warehouse
  - **Serial number selection - Replacement:** To select the serial number to be replaced
6. If the serial numbers replaced are not required to be sent to repair warehouse then only Serial Number Selection - Replacement window will get open.
7. After selecting the serial numbers on Serial Selection window, click Process button.

## Defining the Order Replacement form

The Order Replacement form helps to specify the order replacement information. Figure Rental 7.4.1 displays the Order Replacement form:

**Serial Number Selection - Order Replacement**

Rows from Documents

#	Item No.	Item Description	Rental Whse	Quantity	Total Selected	Open Qty
1	RntalSerItem	RntalSerItem	01	3	3	0

Available Serial Numbers

Find

Serial No.
RntalSerItem_37
RntalSerItem_38
RntalSerItem_39
RntalSerItem_40
RntalSerItem_41
RntalSerItem_42

Available Quantity

Selected Serial Numbers

#	Serial Number
RntalSerItem_5	
RntalSerItem_8	
RntalSerItem_9	

Total Selected

**Figure Rental 7.4.1: Serial Number Selection – Order Replacement**

### Defining the General Area

The various fields in the General Area of the Order Replacement form are as follows:

- **Update:** After selecting the serial numbers Update button needs to be clicked to update the system with information.
- **Cancel:** Click the cancel button to cancel the selection and move out of the screen.
- **Auto Select:** Click this button to let the system select the Serial Numbers of items to be shipped to the customer against the order.

- **Find:** Use this field to search for a specific serial number from the available list. Enter the full or partial serial number of the desired item and tab out of the field to begin search.
- **Available Quantity:** Displays the available quantity for a selected rental item in the Rental warehouse. This field is non-editable.
- **Total Selected:** This field shows the total quantity selected so far.

### Defining the Grids

The grid lists the line item of Rental Order selected for replacement. The various fields in the Rows from the Document grid are as follows:

- **Item No.:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Rented Warehouse:** Displays the Rented warehouse.
- **Quantity:** Displays the quantity of the rental item required by the customer.
- **Total Selected:** This field shows the total quantity selected so far.
- **Open Quantity:** Displays the deliverable quantity for which serial numbers should be selected.

This grid lists all serial numbers of item selected that are rented out on an order. The field in the Selected Serial Number is as follows:

- **Serial Number:** The column contains a list of all serial numbers of the selected item that have been rented out and needs to get replaced. Please select serial numbers to be replaced and transfer them to Available Serial Number list by using the button the < symbol to the right of the grid. This grid lists all available serial numbers of the selected item in the Rows.
- **Serial Number:** The column contains a list of all available serial numbers of the selected item. Please select serial numbers of an item which needs to be rented out as a replacement and transfer them to Selected Serial Number list by using the button with > symbol to the right of the grid.

### Serial Number Selection – Repair

Serial Number Selection – Repair form (Figure Rental 7.7.1) will open once you click the process button on Process Replacement Screen, repair warehouse is selected and repair quantity is specified for the selected row in Process Replacement Matrix.

**Serial Number Selection - Repair Items**

Rows from Documents

#	Item No.	Item Description	Rented Whse	Quantity	Total Selected	Open Qty
1	RntalSerItem	RntalSerItem	02	1		0

Available Serial Numbers

Find:

#	Serial Number
	RntalSerItem_5
	RntalSerItem_8
	RntalSerItem_9

Selected Serial Numbers

#	Serial Number

Available Quantity:

Total Selected:

Buttons: OK, Cancel, Auto Select

**Figure Rental 7.7.1: Serial Number Selection – Repair**

### Defining the General Area

The various fields in the General Area of the Serial Number Selection Repair Screen are as follows:



- **Update/Ok:** After selecting the serial numbers Update button needs to be clicked to update the system with information.
- **Cancel:** Click the cancel button to cancel the selection and move out of the screen.
- **Select all:** Click this button to let the system select the Serial Numbers of items to be shipped to the customer against the order.
- **Find:** Use this field to search for a specific serial number from the available list. Enter the full or partial serial number of the desired item and tab out of the field to begin search.
- **Available Quantity:** Displays the available quantity for a selected rental item in the Rental warehouse. This field is non-editable.
- **Total Selected:** This field shows the total quantity selected so far.

### Defining the Grids

The grid lists the line item of Rental Order selected for replacement. The various fields in the Rows of the Document are as follows:

- **Item No.:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Rented Warehouse:** Displays the rented warehouse.
- **Quantity:** Displays the quantity of the rental item required by the customer.
- **Total Selected:** This field shows the total quantity selected so far.
- **Open Quantity:** Displays the deliverable quantity for which serial numbers should be selected.

The field in the Selected Serial Numbers grid is as follows:

- **Serial Number:** This grid lists all serial numbers of item selected; those are rented out on an order and are supposed to be sending for repair.

This grid lists all available serial numbers of the selected item in the Rows. The field in the Available Serial Number grid is as follows:



- Serial Number:** The column contains a list of all serial numbers of the selected item that had been rented out and needs to be sending for repair. Please select serial numbers for repair and transfer them to Selected Serial Number list by using the button the > symbol to the right of the grid.

### Working with Rental Return

The Rental Return menu option opens the Rental Return form to manage the return information of the rental items. The rental return screen is used to return rental items back to the rental warehouse. It can also be used to identify consumed or damaged items during the rental period. The Rental Return form helps to manage the rental item returns including returning items, closing Rental Orders and setting up for final invoicing.

The Rental Return module consists of four screens which provide you with steps to process the return of rental items. Figure Rental 8.1 displays the Rental Return form:

#	Order No.	Base Line No.	Item No.	Item Description	Rented Qty	Repair Whse	Rental Whse	Delivered Qty	Rented Whse	Returned/Consumed Qty	Returned Qty	Consumed Qty	Repair Qty	Balance Qty	Return Time	Dimension 1
1	13	1	RentalSerItem	RentalSerItem	3,000	01		3,000	02	0,000	3,000	0,000	0,000	3,000		
2	13	2	RentalSerItem	RentalSerItem	3,000	01		3,000	02	0,000	3,000	0,000	0,000	3,000		
3	13	3	RentalSerItem	RentalSerItem	1,000	01		1,000	02	0,000	1,000	0,000	0,000	1,000		

Figure Rental 8.1: Rental Return

## Defining the Header Section

Header section consists of customer and order information for which the return needs to be processed. The section consists of following fields, which help in searching for the specific customer and order.

- **Customer:** Displays the customer reference number as defined in the Business Partner Master Data.
- **Name:** Displays the name of the customer as defined in the Business Partner Master Data.
- **Contact Person:** Name of the default contact person as defined in the Business Partner Master Data. If required, enter a different contact person.
- **Phone:** Phone number of the default / selected contact person.
- **Document No.:** Number of the Rental Order. The number is automatically assigned by the system.
- **Posting Date:** Displays the date of posting of the Rental Order.
- **Return Series:** By default the system shows the primary series as the series for the inventory transfer which would be generated after returning the Rental Order. If required, it can be changed.
- **Repair Series:** By default the system shows the primary series as the series for the inventory transfer which would be generated when the item / items move from the rented to repair warehouse. If required, it can be changed.

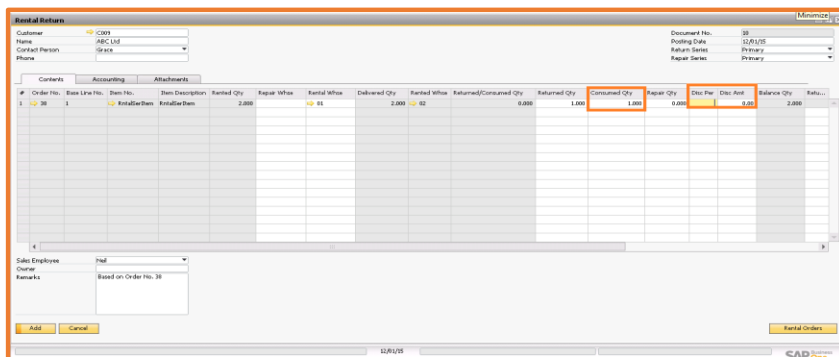
## Defining the Grid

The various fields in the Contents Grid are as follows:

- **Order No.:** Displays the Rental Order number.
- **Base Line No:** Lists the number of the line item.
- **Item No.:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.

- **Rented Quantity:** Displays the quantity of the rental item that has been rented.
- **Repair Warehouse:** Displays the warehouse to which the rental item needs to be shifted for repair, if required.
- **Rental Warehouse:** Displays the warehouse to which the rental item needs to be shifted after return.
- **Delivered Quantity:** Displays the quantity of the rental item delivered to the customer.
- **Returned / Consumed Quantity:** Displays the quantity of the rental items returned. This includes items returned or consumed.
- **Returned Quantity:** Displays the quantity of the rental item returned by the customer.
- **Consumed Quantity:** Displays the quantity of the rental item consumed by the customer and further invoicing needs to happen.
- **Balance Quantity:** Displays the number of items remaining at the customer end.
- **Repair Quantity:** Displays the number of items that need to be sent for repair.
- **Disc Per:** Specifies the discount percentage offered, in case the item is consumed.
- **Disc Amt.:** Specifies the discount amount which is calculated on the basis of discount percentage specified in *Disc Per*.
- **Don't Charge:** Specifies the dates or days which are non-chargeable.
- **Don't Charge After:** Specifies a date after which the rental items are non-chargeable.

Rental Return form has been shown in the Figure Rental 8.2.1

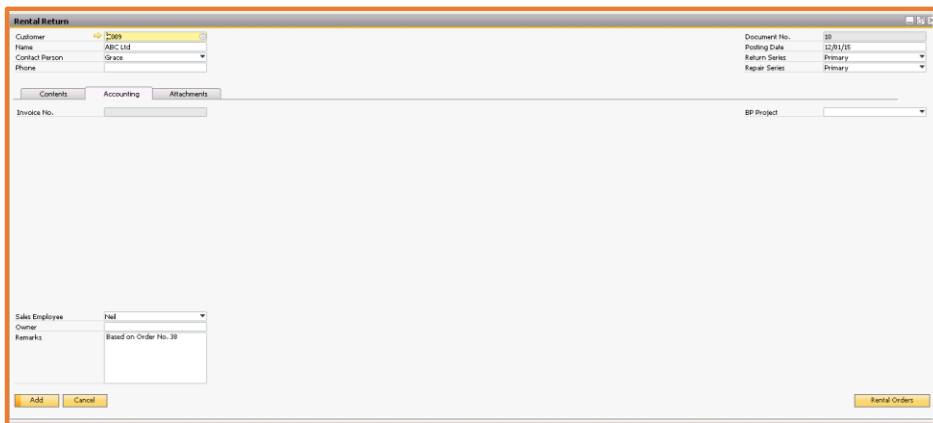


#	Order No.	Item No.	Item Description	Rented Qty	Repair Qty	Rental Warehouse	Delivered Qty	Returned/Consumed Qty	Returned Qty	Consumed Qty	Repair Qty	Disc Per	Disc Amt	Balance Qty	Rate
1	38	1	Rental Item	2	0	01	2	0	0	1	0	0	0	2	

**Figure Rental 8.2.1: Rental Return – Discount Functionality**

### Defining the Accounting Section

The Rental Return Accounting tab (Figure Rental 8.3.1) captures information regarding the accounting aspects of the rental quotation.



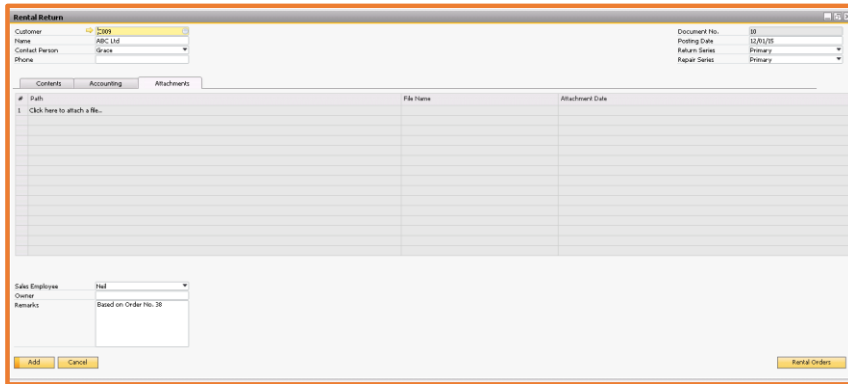
**Figure Rental 8.3.1: Rental Return – Accounting Tab**

The Accounting tab in the Rental Return form contains the following options:

- **Invoice No:** Displays the A/R invoice created against a particular Rental Order.
- **BP Project:** Displays the projects linked to the particular customer

### Defining the Attachments Section

The Rental Return tab (Figure Rental 8.4.1) captures information regarding the attachment aspects of the rental quotation.



**Figure Rental 8.4.1: Rental Return– Attachments tab**

The Attachments tab in the Rental Quotation form contains the following options:

- **Path:** Displays the actual path of the attachment, where it is stored in the system.
- **File Name:** Displays the name of the attached file.
- **Attachment Date:** Displays the date of attachment.

### Defining the General Area

The various fields in the General area are as follows:

- **Owner:** Name of document owner.
- **Remarks:** General remarks supplied during the order stage. By default it contains the Rental Order number.
- **Add button:** Click this button to process the returns.
- **Cancel button:** Click this button to complete the transaction.
- **Rental Orders:** Click this button to search for existing Rental Orders from the customer selected in the header section.

## Defining the Rental Orders

This screen helps you find all rented orders from a specific customer, as shown in Figure Rental 8.6.1:

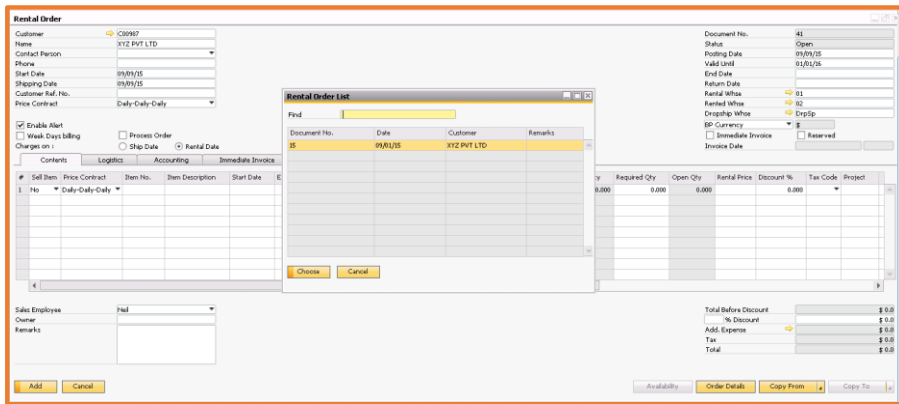


Figure Rental 8.6.1: List of Rental Orders

### Defining the Header Section

The various fields in the header section are as follows:

- **Find:** Use this option to find the Rental Order for which you wish to process rental returns. This is to locate the Rental Order in the list which can be searched with document number.

### Defining the Grid Section

The various fields in the Grid section are as follows:

- **Document No.:** Number of the Rental Order. The number is automatically assigned by the system.

- **Customer:** Displays the customer reference number as defined in the Business Partner Master Data.
- **Remarks:** General remarks supplied during the order stage. By default it contains the Rental Order number.

### Defining the General Area

The various fields in the general area of the rental return are as follows:

- **Choose:** Click the choose button to select the Rental Order for which you wish to process rental return.
- **Cancel:** Click the cancel button to cancel the selection and move out of the screen.

### Defining the Return Items Selection

This screen helps select the items which have been returned, as shown in Figure Rental 8.10.1:

Document No.	Base Order LineNo.	Item No.	Item Description	Required Qty	Rental Whse	R.
16	1	RentalSerItem2	RentalSerItem2	1.000	01	➔

Choose Cancel

**Figure Rental 8.10.1: Return Items Selection**

## Defining the Grid Section

The various fields in the Grid Section of the Return Items Selection form are as follows:

- **Document No.:** Number of the Rental Order. The number is automatically assigned by the system.
- **Base Order Line No.:** Displays the line number of the Rental Order.
- **Item No.:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Required Quantity:** Displays the quantity for the item required by the customer.
- **Rental Warehouse:** Displays the warehouse to which the rented item will be returned.
- **Rented Warehouse:** Displays the warehouse from which the rented item will be returned.
- **Delivered Quantity:** Displays the quantity of the item which was delivered to the customer.
- **Returned / Consumed Quantity:** Displays the quantity of the item which was returned or consumed until this return.

## Defining the General Area

The various fields in the General Area of the Return Items Selection form are as follows:

- **Choose button:** Click the choose button to choose the line items inside rental return window.
- **Cancel button:** Click the cancel button to cancel the selection and move out of the screen.

## Defining the Rental Items Form

The Serial Number Selection Rental Items helps to work with the return items information, as shown in Figure Rental 8.13.1:



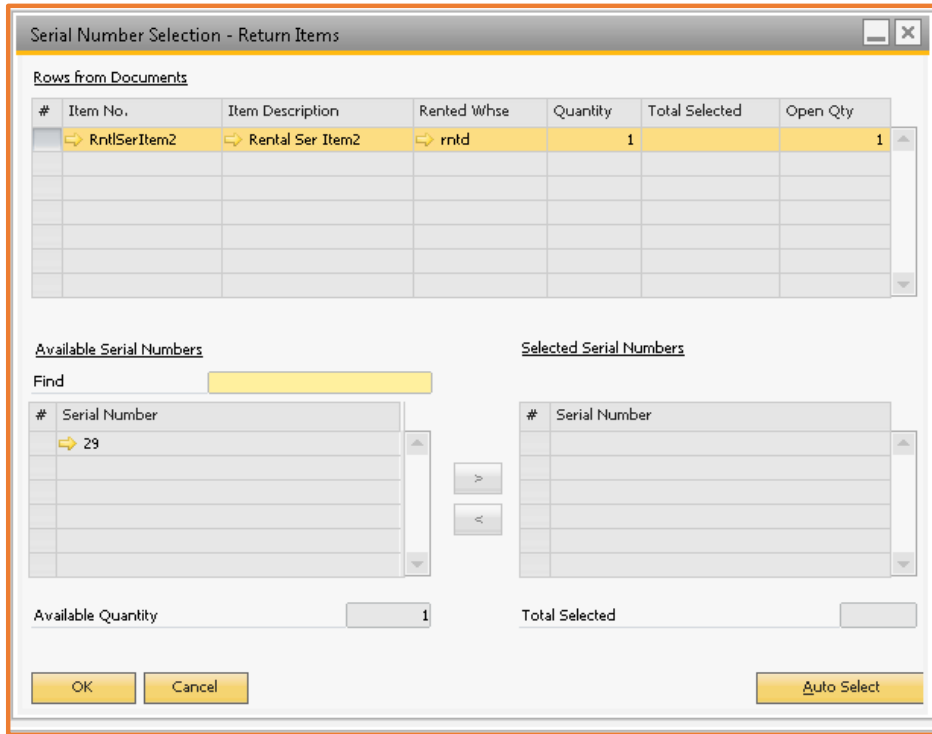


Figure Rental 8.13.1: Serial Number Selection – Consumed Items

### Defining the Grids

The various fields in the Rows from document grid are as follows:

- **Item No.:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Rented Warehouse:** The warehouse from which items should be transferred to rented warehouse.
- **Quantity:** Number of pieces of items required by the customer.
- **Total Selected:** This field shows the total quantity selected so far.



- **Open Quantity:** Displays the returned quantity for which serial numbers should be selected.

This grid lists all available serial numbers of the selected item in the Rows from Document grid.

The field in the available serial number grid is as follows:

- **Serial Number:** The column contains list of all available serial numbers of the selected item. Please select item which to attach to the order and transfer them to Selected Serial Number list by using the button the > symbol to the right of the grid. This grid lists all available serial numbers of the selected item in the Rows from Document grid. The field in the selected serial number is as follows:
  - **Serial Number:** Contains list of serial numbers selected from the available serial numbers list.

### Defining the General Area

The various fields in the general area are as follows:

- **Update:** After selecting the serial numbers Update button needs to be clicked to update the system with information.
- **Cancel:** Click the cancel button to cancel the selection and move out of the screen.
- **Auto Select:** Click this button to let the system select the Serial Numbers of items to be shipped to the customer against the order.
- **Find:** Use this field to search for a specific serial number from the available list. Enter the full or partial serial number of the desired item and tab out of the field to begin search.
- **Available Quantity:** This field shows the available quantity in the Rental warehouse. This field is non-editable.
- **Total Selected:** This field shows the quantity selected so far.

## Processing the Rental Return

In order to process a rental return you need to select “Rental Return” option in the Rental menu. This will open the “Rental Return” screen.

Let’s perform the following steps to process the rental return:

- Please select the customer.
- Click the Rental Order button on the bottom right hand corner of the screen.
- This will open the “List of Rental Orders Screen”.
- This lists all the Rental Orders against the selected customer. The screen will only list Rental Orders whose status is “Rented”.
- Please select the order for which you wish to process rental return and click the choose button.
- This will open the “Return Items Selection” screen with a list of all serialized and non-serialized items rented to the customer against the specified order.
- Please select the items that are being returned. Please note that you can select multiple lines by clicking the “Control” button and selecting the line items.
- This will open the “Rental Order Screen” where you can see all the details of the selected order and the line items.
- For a specified item on the order, please enter the “Returned Qty”. You can then tab out (it will take you to the “Serial Number Selection – Returned Quantity” screen) or move to the “Consumed Qty” column. In case of tab out please follow the process mentioned in 14 below.
- In case items have been consumed by customers please enter the number of items consumed in “Consumed Qty”. For a specified item on the order, please enter the “Consumed Qty”. You can then tab out (it will take you to the “Serial Number Selection – Consumed Quantity” screen) or move to the “Balance Qty” column. In case of tab out please follow the process mentioned in 15 below.
- In case return items need repair please enter the code for the “Repair Whse”. For a specified item on the order, please enter the “Repair Qty”. You can then tab out (it will take you to the

“Serial Number Selection – Repair Items” screen) or move to the “Balance Qty” column. In case of tab out please follow the process mentioned in 16 below.

- The “Balance Qty” column displays the number of items still at the customer end.
- Click Add. If you did not tab out of the “Returned Qty” or “Consumed Qty” column, in case of serialized items, you will be taken to the serial number selection screen.

**Note:** Please note that if you did not tab out of the “Returned Qty” or “Consumed Qty” column, first you will be taken to the “Serial Number Selection – Returned Quantity” screen where you will have to select the serial numbers for all the returned rental items in the same screen. After selecting the serial numbers for the returned quantity, once you click OK, you will be taken to the “Serial Number Selection – Consumed Quantity” screen where you will have to select the serial numbers for all the consumed rental items in the same screen.

- Serial Number Selection – Returned Quantity.
- Please note that for a serialized item, in case you tab out of the screen, the “Serial Number Selection – Return” screen will open. In case you do not tab out, the “Serial Number Selection – Return” screen will open once you click the add button.
- The “Serial Number Selection – Return” screen shows a list of all the rented items that were sent against the specified order.
- In the “Serial Number Selection – Return” screen please select an item from the “Rows from Document” grid. This will display a list of serial numbers for the item selected in the “Available Serial Numbers” grid.
- To select serial numbers to be returned there are two options:
  - In case all the items are being returned, you can click the “Select All” button to select all the serial numbers to be returned.
  - The second option is to manually select the serial numbers from the “Available Serial Numbers” grid to “Selected Serial Numbers” grid. Please select an item and use the “>” button to transfer.
- Repeat the process for all serialized items in the “Rows from Document” grid. Once finished click the Update button.
- Serial Number Selection – Consumed Quantity.



**Note:** For a serialized item, in case you tab out of the screen, the “Serial Number Selection – Consumed Items” screen will open. In case you do not tab out, the “Serial Number Selection – Consumed Items” screen will open once you click the add button.

- The “Serial Number Selection – Consumed Items” screen shows a list of all the rented items that were sent against the specified order.
- In the “Serial Number Selection – Consumed Items” screen please select an item from the “Rows from Document” grid. This will display a list of serial numbers for the item selected in the “Available Serial Numbers” grid.
- To select serial numbers which have been consumed there are two options:
  - In case all the items are being consumed, you can click the “Select All” button to select all the serial numbers and mark as consumed.
  - The second option is to manually select the serial numbers from the “Available Serial Numbers” grid to “Selected Serial Numbers” grid. Please select an item and use the “>” button to transfer.
- Repeat the process for all serialized items in the “Rows from Document” grid. Once finished click the Update button.
- Serial Number Selection – Repair Items.

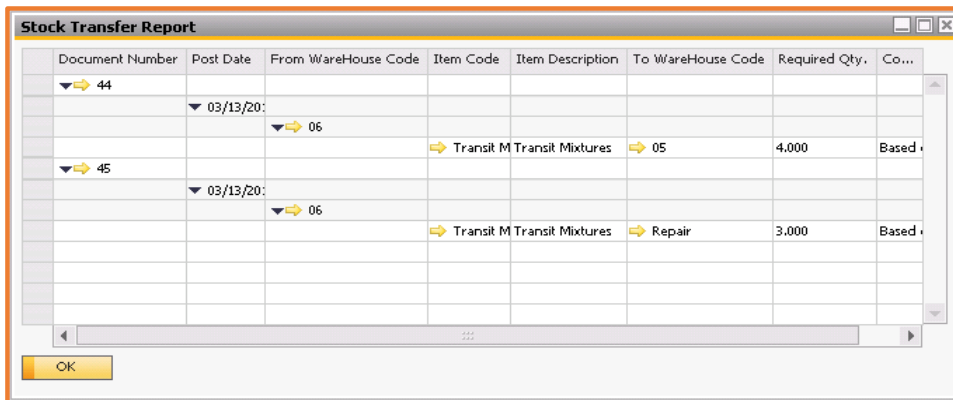
**Note:** For a serialized item, in case you tab out of the screen, the “Serial Number Selection – Repair Items” screen will open. In case you do not tab out, the “Serial Number Selection – Repair Items” screen will open once you click the add button.

- The “Serial Number Selection – Repair Items” screen shows a list of all the rented items that were sent against the specified order.
- In the “Serial Number Selection – Repair Items” screen please select an item from the “Rows from Document” grid. This will display a list of serial numbers for the item selected in the “Available Serial Numbers” grid.
- To select serial numbers to be returned there are two options:

- In case all the items are being returned, you can click the “Select All” button to select all the serial numbers to be returned.
- The second option is to manually select the serial numbers from the “Available Serial Numbers” grid to “Selected Serial Numbers” grid. Please select an item and use the “>” button to transfer.
- Repeat the process for all serialized items in the “Rows from Document” grid. Once finished click the Update button.

### Rental Return Stock Transfer Report

The Stock Transfer Report would be visible on the Rental Return. It shows information about the stock transfers which are created during rental return process.



Document Number	Post Date	From Warehouse Code	Item Code	Item Description	To Warehouse Code	Required Qty.	Co...
44	03/13/20	06	05	Transit M Transit Mixtures	05	4,000	Based
45	03/13/20	06	Repair	Transit M Transit Mixtures	Repair	3,000	Based

Figure Rental 8.17.1: Stock Transfer Report

The Stock Transfer Report contains the following options:

- **Document Number:** Rental order document number.
- **Posting Date:** Posting date of the Rental Order.
- **From Warehouse:** Warehouse from which stock is going to be rented.
- **Item Code:** Item code on the rental return.



- **Item Description:** Item description.
- **To Warehouse:** Warehouse in which stock is going.
- **Required Quantity:** Rented quantity.
- **Comment:** Comments on the Rental Order.

### **Return Serial Number Report**

Return serial number report would be displayed on the rental return in context menu of the general section. This displays overall return information.

Serial Number Transaction Report									
Item Details									
Line No.	Item Code	Item Description	From Warehouse Code	To Warehouse Code	Repair Warehouse Code	Return Qty.	Consume Qty.	Repair Qty.	
1	Transit Mixtures	Transit Mixtures	06	05	Repair	4,000	3,000	3,000	
Transactions for Serial Number: Transit Mixtures									
Line No.	Item Code	Item Name	From Warehouse Code	To Warehouse Code	Serial Number	Quantity	Serial Item Type		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_25	1	Consume		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_26	1	Consume		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_27	1	Consume		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_28	1	Return		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_29	1	Return		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_30	1	Return		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_31	1	Return		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_32	1	Repair		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_33	1	Repair		
1	Transit Mixtures	Transit Mixtures	06	05	Transit_Mixtures_34	1	Repair		

OK

**Figure Rental 8.18.1: Serial Number Transaction Report**

The Serial Number Transaction Report Items contains the following options:

- **Line No:** Line number of the item for which extension is created.
- **Item Code:** Item Code.
- **Item Description:** Item Description.
- **From Warehouse:** Rental warehouse.
- **To Warehouse:** Rental warehouse.
- **Repair Warehouse:** Rental warehouse.
- **Return Quantity:** Returned quantity.
- **Consumed Quantity:** Consumed quantity.
- **Repair Quantity:** Repair quantity.





The Serial Number Transaction Report Transaction for Serial Number contains the following options:

- **Line No:** Line number of the item for which extension is created.
- **Item Code:** Item Code.
- **Item Description:** Item Description.
- **From warehouse:** Rented warehouse.
- **To warehouse:** Rental warehouse.
- **Serial Number:** Serial number reserved for the item.
- **Serial Item Type:** Type of rental return.

## Return Document

### Rental Return

**OEC Computers - Rental**

**Business Partner:** Norm Thompson  
**Contact Person:** Norm Thompson  
**Contact No:** (610) 565-9000

**Doc Num:** 6  
**Date:** 03/13/2014  
**Return Date:** 03/13/2014

**Remarks:**  
 Based on Order No. 33

Line ID	Item No.	Description	Rented Qty.	Returned Qty.	Repaired Qty.	Consumed Qty.
1	Transit Mixtures	Transit Mixtures	10.00	4.00	3.00	3.00

Returned Serials		Repaired Serials		Consumed Serials	
Serial	Warehouse	Serial	Warehouse	Serial	Rented Whse
Transit_Mixtures_28	05	Transit_Mixtures_32	05	Transit_Mixtures_25	06
Transit_Mixtures_29	05	Transit_Mixtures_33	05	Transit_Mixtures_26	06
Transit_Mixtures_30	05	Transit_Mixtures_34	05	Transit_Mixtures_27	06
Transit_Mixtures_31	05				

**Figure Rental 8.18.1: Return Document**

The Rental Return Document contains the following options:

- **Doc Number:** Rental return document number.
- **Date:** Document date.
- **Return Date:** Return Date.
- **Business Partner:** Business Partner name.
- **Contact Person:** Contact person name.
- **Contact No:** Contact number of the contact person.
- **Remarks:** Remarks on then document.

- **Line Id:** Line ID.
- **Item No:** Item number on the line.
- **Description:** Description of the Item.
- **Rented Quantity:** Rented quantity of the item.
- **Returned Quantity:** Returned quantity of the item.
- **Repaired Quantity:** Repaired quantity of the item if available.
- **Consumed Quantity:** Consumed quantity of the item if available.
- **Returned/Repaired:** Serial numbers of the returned/repaired/consumed items.
- **Consumed Serials**
- **Warehouse:** Warehouse name in which serials are stored.

### Toolbox operations on Rental Return



**Figure Rental 8.20.1 Rental Order Report**

The Print Preview, Print and Email tools can be used for Reserve Serial Number Report.

### Rental Return - By Serial Number

This functionality allows the user to perform a Rental Return on the basis of the Scanned Serial Number of a Rental Item.

#### Defining the Rental Return – By Serial Number Form:

#### Header Section

Rental Return - By Serial Number

Serial Number:  Posting Date:

#	Serial Number	Customer	Customer Name	Order No.	Base Line No.	Item No.	Item Description	Return Type	Rental/Repair Whse	Rented Whse	Return Series	Repair Series	Distr. Rule	Project	Disc %	Disc Amt	Donk Chrg
1	X_26	Cust	Customer	168	1	X_Rnt1_X_RntItemSer01	Return	01	rntd	Primary	Primary						<input checked="" type="checkbox"/>

Process Cancel

- **Serial Number:** User needs to enter the serial number of the Item which needs to be processed.
- **Posting date:** User needs to enter the Posting Date of the Item which needs to be processed.

## Rows Section

- **Serial Number:** Displays Serial Number of the Items that need to be processed.
- **Customer:** Displays the customer reference number as defined in the Business Partner Master Data.
- **Customer Name:** Displays the name of the customer as defined in the Business Partner Master Data.
- **Order No.:** Displays the Rental order number.
- **Base Line No:** Lists the number of the line item.
- **Item No.:** Displays the number of the item as defined in the Item Master Data.
- **Item Description:** Displays the description of the item as defined in the Item Master Data.
- **Return Type:** It can be any out of Return, Repair and Consumed.
- **Rental/Repair Ware House:** Specifies the Rental or Repair Warehouse.
- **Rented Ware House:** Specifies the Rented Warehouse.
- **Return Series:** Specifies the Inventory processing series for Return.
- **Repair Series:** Specifies the Inventory processing series for the Repair.
- **Disc %:** Specifies the percentage discount offered in case return type is consumed item.

- **Disc Amt:** Automatically gets calculated on the basis of the discount percentage defined earlier.

User needs to perform the following steps to process Rental Return – By Serial Number:

1. Enter the search criteria in the header section to search Items for Rental Return processing.
2. Select the value for the “Return Type” in the Grid Section and relevant values for other columns.
3. If the Return Type is “Consumed” then user needs to enter value for “Disc %” and “Disc Amt” gets calculated based on it.

“Rental Return – By Serial Number” form has been shown in the Figure Rental 9.1

Commented [DG1]: Needs new image

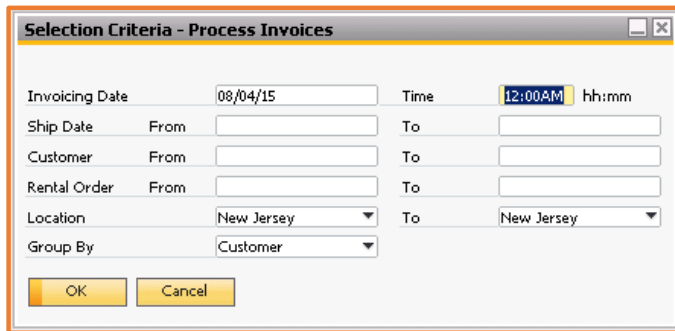
**Figure Rental 9.1: Rental Return – By Serial Number**

## Working with Process Invoices

The Process Invoices menu opens the Process Invoices form. You can use the Process Invoices form to process the invoices that includes periodic invoicing, mass invoicing, invoicing ahead of time or one time invoicing. The Process Invoices screen enables you to process the invoices up to the date entered by the user. Let’s learn to process the invoice.

### Processing the Invoice

In order to process an invoice you need to select Process Invoices menu option in the Rental menu. The Selection Criteria – Cyclic invoicing form gets displayed, as shown in Figure Rental 10.1.1:



**Figure Rental 10.1.1: Selection Criteria – Cyclic Invoicing**

The various fields in the Selection Criteria- Cyclic Invoicing form are as follows:

- **Invoicing Date:** Enter the date on which you wish to process the invoice.
- **Customer From / To:** Select the customer number / range as defined in the Business Partner Master Data (this is to specify only those customers you wish to invoice).
- **Rental Order From / To:** Select the Rental Order number / range for which you wish to process the invoice.
- **Location From / To:** Select the location / range for which you wish to process the invoice.

Let's perform the following steps to process an invoice:

1. Enter the date on which you wish to invoice.
2. Enter the Customer / Customers.
3. Enter the Rental Order / Orders.
4. Enter the Location / Locations.
5. Click process.

The system checks the following criteria before processing the specified invoices:

- Rented Order / Orders.

- Line items in the above Rental Order / Orders for which the Returned check is not flagged.
- Line items whose value is zero and the “Allow Zero Value Item on Invoicing” is checked in the Rental – Setups.

The line items that meet the above selection criteria get displayed in the Process Invoices form, as shown in Figure Rental 10.1.2.

Customer	Order No.	Line No.	Item No.	Item Description	Last Invoice Date	Price Code	Amount to Invoice	Select	Down Payment
46550(John Deere)	1	1	RntalSerItem	RntalSerItem			\$ 1564.00	<input type="checkbox"/>	\$ 0.00
		2	RntalSerItem	RntalSerItem			\$ 4689.00	<input type="checkbox"/>	\$ 0.00
C00K(ABC Ltd)	5	1	RntalSerItem	RntalSerItem		DWM	\$ 2300.00	<input type="checkbox"/>	\$ 0.00
		6	RntalSerItem	RntalSerItem		DWM	\$ 2300.00	<input type="checkbox"/>	\$ 0.00
		7	RntalSerItem	RntalSerItem		DDO	\$ 719.00	<input type="checkbox"/>	\$ 0.00
C100(The Supply Store)	10	1	RntalSerItem	RntalSerItem	07/23/2015	DDO	\$ 240.00	<input type="checkbox"/>	\$ 0.00
Amount to Invoice Total								\$ 11799.00	
Down Payment Total								\$ 0.00	

**Figure Rental 10.1.2: Process Invoices**

The various fields in the Process Invoices form are as follows:

- **Customer:** Displays the customer number / range for who you wish to process the invoice(s).
- **Order No.:** Displays the Rental Order number / range for which you wish to process the invoice(s).
- **Line No.:** Displays the line number / numbers of the Rental Order.
- **Item No.:** Displays the item number as defined in the Item master Data.
- **Item Description:** Displays the item description as defined in the Item master Data.



- **Last Invoice Date:** Displays the date on which the last invoice was raised for this particular order.
- **Price Code:** Displays the price code for the particular order in case of price matrix.
- **Amount to Invoice:** Displays the item wise due amount based on the rental period and invoice processing date.
- **Select Check Box:** Select the order lines for which you want to process the invoices.
- **Down payment:** Specifies all the Down Payment(s) made by the concerned customer.

The User needs to click on the “Down Payment” column wherefrom the “A/R Down Payment” window opens up which displays all the Down Payments made by the concerned Customer. User can select the relevant Down Payment from the list by selecting appropriate Document Number.

To draw the intended value from the Down Payment, user needs to enter appropriate amount in “Net Amount to Draw” column.

“A/R Down Payment” has been shown in the Figure Rental 10.1.3

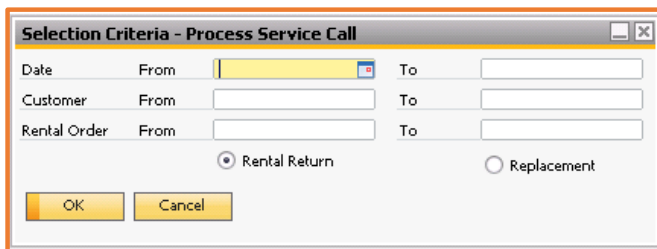




contract exists. You can use the Process Service Call form to load all the items sent for repairing either from Replacement/Rental Return/Return by serial number form to process the service call. This functionality enables you to process all service calls which had been sent for repairing from Replacement/Rental return /Return by serial number windows.

### Generating the Service Call for Item Repair

In order to generate a service call for the item on an order you need to select the Process Service Call option in the Rental menu. This will open the Selection Criteria – Processing Services form.



**Figure Rental 11.1.1: Selection Criteria**

The various fields in the Selection Criteria- Processing Services form are as follows:

- **Date From / To:** Select the date / range for selecting the orders for generating service call.
- **Customer From / To:** Select the customer number / range as defined in the Business Partner Master Data (this is to specify only those customers for which you wish to generate service calls).
- **Rental Order From / To:** Select the Rental Order number / range for which you wish to generate service calls.
- **Rental Return:** Filter out the orders on which items had been sent to repair warehouse while making Rental Return.
- **Replacement:** Filter out the orders on which items have been sent to repair warehouse while doing Replacement.

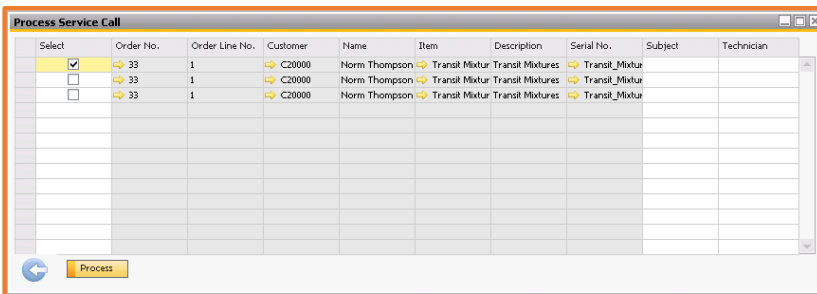
Let's perform the following steps to replace an order item:

1. Enter the date for selecting the order.
2. Enter the Customer / Customers.
3. Enter the Rental Order / Orders.
4. Select either Rental Return or Replacement option.
5. Click OK button.

All the serialized items, on orders belonging to selected date range, which have been sent for repairing either on Replacement/Rental return depending on the criteria selected, will get populated on the Process service call screen.

### Processing the Service Call

The Processing Service Call form is used to specify the information related to the processing of the service call. The Process Service Call form is displayed in Figure Rental 11.2.1:



Select	Order No.	Order Line No.	Customer	Name	Item	Description	Serial No.	Subject	Technician
<input checked="" type="checkbox"/>	33	1	C20000	Norm Thompson	Transit Mixtur	Transit Mixtures	Transit_Mixtur		
<input type="checkbox"/>	33	1	C20000	Norm Thompson	Transit Mixtur	Transit Mixtures	Transit_Mixtur		
<input type="checkbox"/>	33	1	C20000	Norm Thompson	Transit Mixtur	Transit Mixtures	Transit_Mixtur		

Figure Rental 11.2.1: Processing Service Calls

The various fields in the Process Service Call form are as follows:

- **Select check box:** Select the order lines for which service call needs to be generated.



- **Order No:** Displays the order number.
- **Order Line No:** Displays order line number.
- **Customer:** Displays customer name as defined in the Business Partner Master Data.
- **Name:** Displays the customer name as defined in the Business Partner Master Data.
- **Item:** Displays the item name as defined in the Item Master Data.
- **Description:** Displays the item description as defined in the Item Master Data.
- **Serial No:** Displays the serial number for an item for which service call needs to be generated.
- **Subject:** Specify the subject of service call.
- **Technician:** Identify the name of the technician who will be responsible for handling the service call.
- **New Serial No:** Specifies the new serial number required to generate service call if already service call has been generated for the given serial number.

Let's perform the following steps to process the service call:

1. Select the order line for which the service call needs to be generated.
2. Specify subject for the service call.
3. Specify technician for the service call.
4. Specify New Serial No if service call already exists for the given serial number.
5. Click Process button.

After processing the service call successfully, system will generate a service call for the selected serial number and the window of process service call gets refreshed.

### **Creating service call manually**

User can also make service call manually for rented item, if he gives onsite service to the customer.

Following are the steps to make a manual service call:

1. Open Service Call window.
2. Select Rental Order for which user wants to provide service.
3. Select a serial number against the Rental Order in case of serialized item.
4. If item is not serialized and exist multiple times on rental order, user need to select the line ID.
5. Service contract will automatically be selected for the Rental Order in case of serialized item.
6. In case of non-serialized item user has to select service contract from filtered list of service contracts.
7. Click on add button to create service call. This call would be displayed on the related Rental Orders service call details.

The screenshot shows the 'Service Call' window with the following data:

Customer	C20000	No.	Primary	27
Name	Norm Thompson	Call Status	Open	
Contact Person	Norm Thompson	Call ID	42	
Telephone No.	(610) 565-9000	Priority	Low	
Mfr Serial No.		Rental Order	28	
Serial Number	Diesel Pumpset_4	Line ID	1	
Item	Diesel Pumpset	Created On	02/21/2014 12:24	
Description	Diesel Pumpset	Closed On		
Item Group	Items	Contract No.	No Contract	
Subject				
End Date				

General Tab Fields:

- Origin: [Dropdown]
- Problem Type: [Dropdown]
- Call Type: [Dropdown]
- Technician: [Text]
- Handled by:  Jayson Butler
- Queue:  [Dropdown]
- Response By: [Text]
- Response On: [Text]
- Resolution By: [Text]
- Resolution On: [Text]

Buttons: Add, Cancel

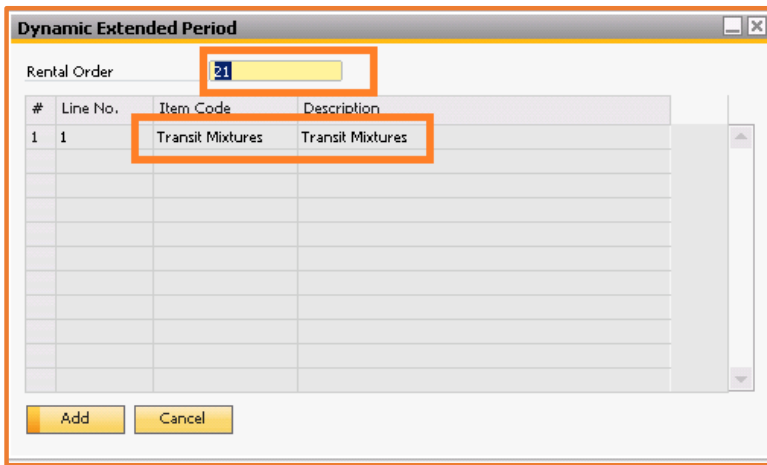
**Figure Rental 11.3.1: Creating manual service calls**

## Dynamic Extended Period

This functionality will help to bifurcate the extended Rental Periods based on the Rental Period Type Sequence defined in the Dynamic Extended Period window.

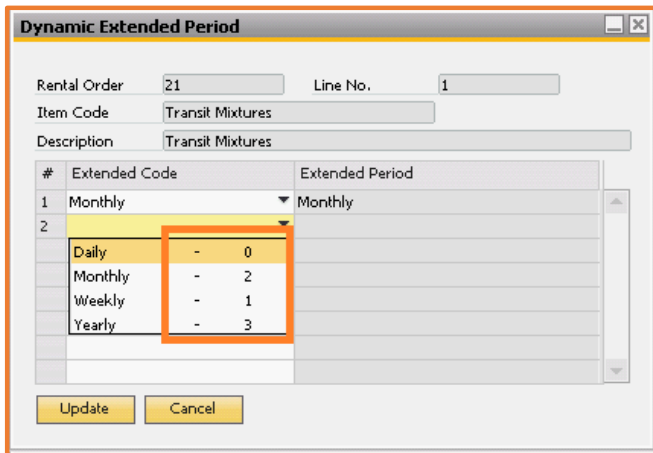
User needs to perform the following steps to use this functionality:

1. Search the required Rental Order in the “Dynamic Extended Period” window and select the Item for which Dynamic Extended Period is required (as shown in the Figure Rental 12.1).



**Figure Rental 12.1: Dynamic Extended Period**

2. Click on the Line No. to open Dynamic Extended Period window where user can define the Rental Period Type Sequence (Figure Rental 12.2).



**Figure Rental 12.2: Dynamic Extended Period**

3. Click on the Update button.

Let's consider the following example:

Price List - Basic

Code	Item	Price
Yearly	X	1000\$
Monthly	X	100\$
Weekly	X	30\$
Daily	X	5\$
Yearly	Y	1000\$
Monthly	Y	100\$
Weekly	Y	30\$
Daily	Y	5\$

Rental Period Defined as:

Code	Name	Type	Period in Days	Price List
Yearly	Yearly	Yearly	165	Basic
Monthly	Monthly	Monthly	30	Basic
Weekly	Weekly	Weekly	7	Basic



Daily	Daily	Daily	1	Basic
-------	-------	-------	---	-------

Rental Order No 1:

Item	Rental Days	Quantity	Rate	Total
Item X	7	1	30\$	30\$
Item Y	7	1	30\$	30\$

Let's consider that following Dynamic Rental Period Sequence has been set:

For Item X		For Item Y	
Bifurcated Ext. Period		Bifurcated Ext. Period	
Monthly		Monthly	
Weekly		Weekly	
		Daily	

Let's consider the following scenarios:

**Scenarios 1** – After return 6 weeks extension

For Item X:

For 1 week =  $1 \times 1 \times 30\$ = 30\$$

Total Period = 42 Days

Extended Period = 35 Days

Now the system will look for bifurcation into extended period table. Firstly it would calculate Months then Weeks accordingly as per bifurcation definition.

Month =  $1 \times 100\$ = 100\$$

Week =  $1 \times 30\$ = 30\$$

**Total Invoice =  $30\$ + 100\$ + 30\$ = 160\$$**





## Scenario 2 – After return 11 weeks extension

For Item Y:

For 1 week =  $1 \times 1 \times 30\$ = 30\$$

Total Period = 77 Days

Extended Period = 70 Days

Months =  $2 \times 100\$ = 200\$$

Weeks =  $3 \times 30\$ = 90\$$

Days =  $2 \times 5\$ = 10\$$

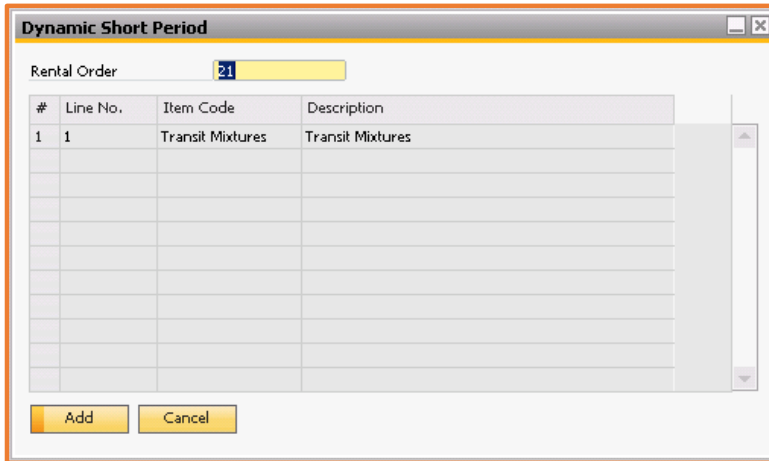
**Total Invoice =  $30\$ + 200\$ + 90\$ + 10\$ = 300\$$**

## Dynamic Short Period

This functionality will help to bifurcate the Short Rental Periods based on the Rental Period Type Sequence defined in the Dynamic Short Period window.

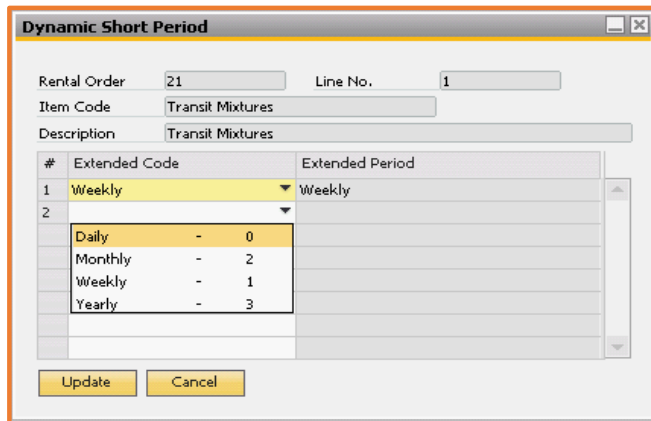
User needs to perform the following steps to use this functionality:

1. Search the required Rental Order in the “Dynamic Short Period” window and select the Item for which Dynamic Short Period is required (as shown in the Figure Rental 13.1).



**Figure Rental 13.1: Dynamic Short Period**

2. Click on the Line No. to open Dynamic Short Period window where user can define the Rental Period Type Sequence (Figure Rental 13.2).



**Figure Rental 13.2: Dynamic Short Period**

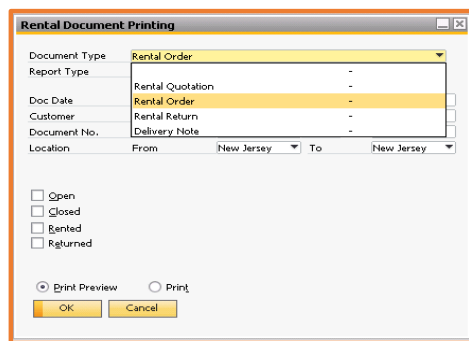
3. Click on the Update button.

## Rental Document Printing

This functionality will help to print the different kinds of Rental Documents.

User needs to perform the following steps to use this functionality:

1. Search the required Document Type like Rental Quotation, Rental Order, Rental Return or Delivery Note from the “Rental Document Printing” window.

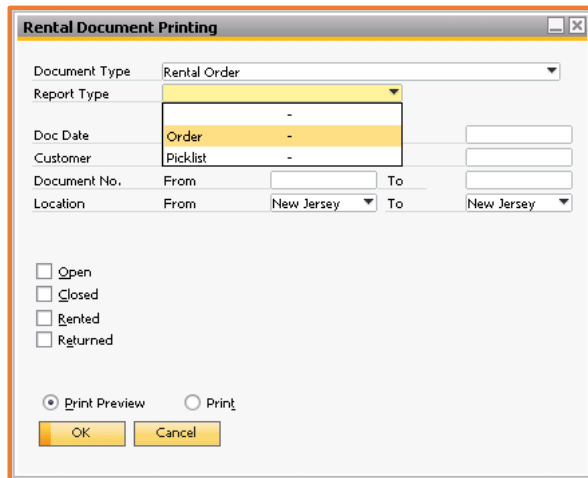


The screenshot shows a software window titled "Rental Document Printing". It contains several fields and controls:

- Document Type:** A dropdown menu set to "Rental Order".
- Report Type:** A list box with "Rental Quotation" selected.
- Doc Date:** A text field with "Rental Order" entered.
- Customer:** A text field with "Rental Return" entered.
- Document No.:** A text field with "Delivery Note" entered.
- Location:** Two dropdown menus labeled "From" and "To", both set to "New Jersey".
- Filters:** Four checkboxes for "Open", "Closed", "Rented", and "Returned", all of which are unchecked.
- Actions:** Two radio buttons for "Print Preview" (selected) and "Print". Below them are "OK" and "Cancel" buttons.

**Figure Rental 14.1: Rental Documents Printing**

2. Select the Report Type like Rental Order or Rental Order Picklist from the “Rental Document Printing” window (as shown in the Figure Rental 14.2).



**Figure Rental 14.2: Rental Documents Printing**

3. Enter the Doc Date in the respective text box.
4. Enter the Customer in the respective text box.
5. Enter the Document No. of the rental document you want to print.
6. Select the exact location of the rental document by selecting the locations in from and to drop down menus.
7. Click the Open, Closed, Rented or Returned check box, according to the status of the rental document to be printed.
8. Select the Print Preview radio button to see, what would be the printed rental document will look like.
9. Select the Print radio button to give printing command.
10. Clicking the Ok Button will execute your given command.
11. Click Cancel if you do not wish to execute your command.

## Rental Reports

The Rental Reports menu contains the forms to display the rental reports. The rental reports are primarily used to check the item availability, rental shipments, and analysis purposes. The Rental

Reports menu includes Availability, Analysis, Incoming, Outgoing rental items, and Print Delivery Report. Let's learn about these reports in detail in the section ahead.

## Availability Report

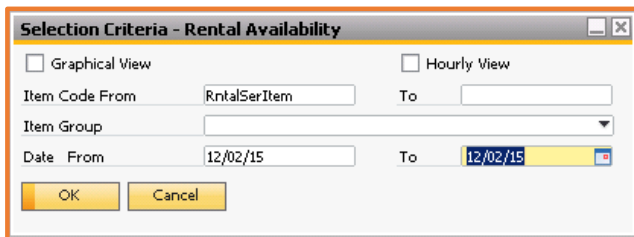
The rental availability report is used to check item availability / reservation.

In order to view the rental availability report, click the "Availability" link under Rental menu. This will open the "Rental Availability - Selection Criteria" screen.

The following two views of the availability reports are available:

1. Non Graphical.
2. Graphical.

User can choose the view according to the need by selecting or deselecting the graphical option available on selection criteria Rental Availability form (Figure Rental 15.1.1).



**Figure Rental 15.1.1: Selection Criteria – Rental Availability**

- **Graphical View:** Select the check box in order to get the calendar view of graphical report and for non-graphical view just left it deselect.
- **Item Code From / To:** Enter the item code / range, as defined in the Item Master Data, for which you wish to see availability.



- **Item Group:** Enter the item group, as defined in the Item Master Data, for which you wish to see availability.
- **Shipping Date From / To:** Enter the shipping date / range for the rental period for which you wish to see availability.

Let's perform the following steps to view the selection criteria non graphical rental availability report:

- Choose the Item code / range.
- Choose the item group.
- Choose the shipping date / range.
- Click OK.

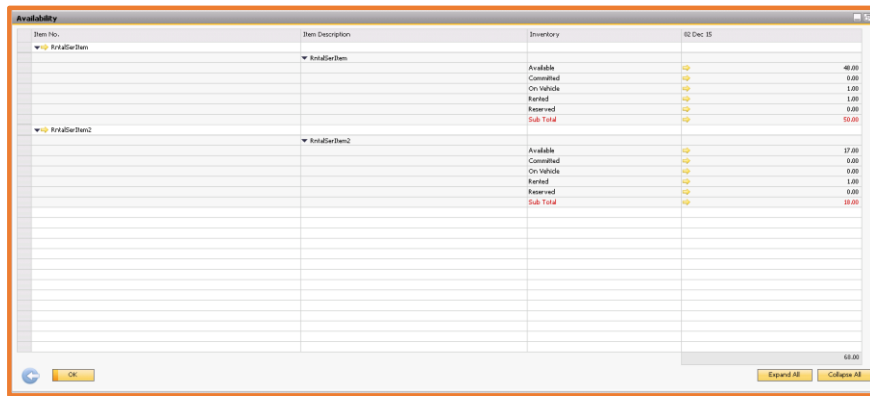
***Note:** Please note that it is mandatory to enter the item code or group and the date to view the non-graphical availability report.*

The system checks the following before showing the availability report:

- Available items in stock for rental.
- All rented items within the selected period.
- All reserved items within the selected period.
- All vehicle items within selected period.

### **Availability Report Screen**

All the line items that meet the information specified in the Selection Criteria- Rental Availability form gets displayed in the Availability report form, as shown in Figure Rental 15.2.1:



Item No.	Item Description	Inventory	31 Dec 15
▼ RntaSerItem	▼ RntaSerItem	Available	40.00
		Committed	0.00
		On Vehicle	1.00
		Rented	1.00
		Reserved	0.00
		Sub Total	50.00
▼ RntaSerItem2	▼ RntaSerItem2	Available	17.00
		Committed	0.00
		On Vehicle	0.00
		Rented	1.00
		Reserved	0.00
		Sub Total	18.00
			68.00

**Figure Rental 15.2.1: Availability Report**

The various fields in the Availability Report form are as follows:

- **Item No.:** Displays the item number as defined in the Item Master Data.
- **Item Description:** Displays the item description as defined in the Item Master Data.
- **Inventory:** Displays the type of inventory i.e. Available, Committed, Rented, Reserved or Vehicle.
- **Date(s):** Displays the dates as selected in the selection criteria.

### Viewing the Non-Graphical Availability Report

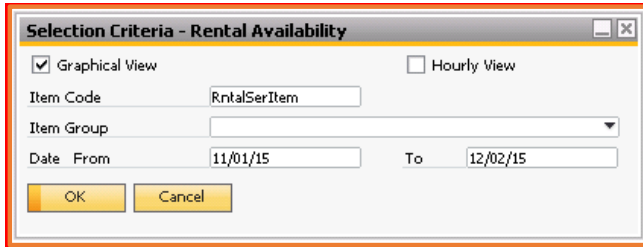
Let's perform the following steps to view the non-graphical availability report:

1. User can view the non-graphical availability report by selecting an item line and clicking the "Availability" button on the Rental Quotation or the Rental Order window. In this method, all parameters will automatically be picked from the item line.
2. User can click the *Rental Reports* → *Availability*. Enter the appropriate item code / range, item group and shipping date / range.

**Note:** Please note that the item code or group and shipping date / range is mandatory to view 'Non-Graphical Availability Report'.

### Selection Criteria - Rental Availability (Graphical View)

The various fields in the Selection Criteria- Rental Availability form, as shown in Figure Rental 15.4.1:



**Figure Rental 15.4.1: Selection Criteria – Availability**

The various fields in the Selection Criteria Rental availability report are as follows:

- **Item Code:** Enter the item code, as defined in the item master data, for which you wish to see the availability.
- **Item Group:** Enter the item group, as defined in the item master data, for which you wish to see availability.
- **Shipping Date From / To:** Enter the shipping date / range for the rental period for which you wish to see availability.
- **Graphical View:** Select the check box in order to get the calendar view of graphical report.

**Note:** Please note that the date range can be a maximum of a month and from and to date must belong to the same month.

Let's perform the following steps to specify the selection criteria:

- Choose the Item code / range.
- Choose the item group.
- Choose the date / range.
- Select the graphical View option.



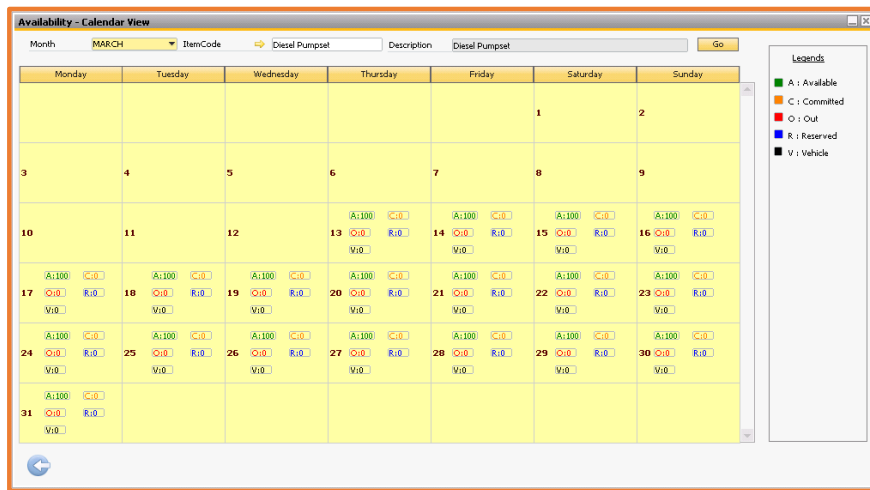
- Click OK.

The system checks the following before showing the availability report:

- Available items in stock for rental.
- All rented items within the selected period.
- All reserved items within the selected period.
- All vehicle items within selected period.

### Defining the Availability Report Screen

Then, all the line items that meet the above selection criteria are shown in the Availability Report Screen (Figure Rental 15.5.1).



**Figure Rental 15.5.1: Availability Report – Graphical View**

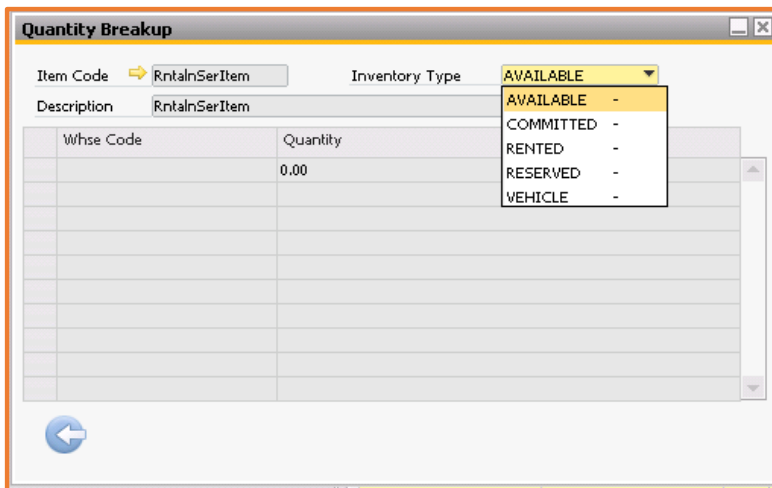
The various fields in the Availability Report form are as follows:

- **Month:** Displays the current selected month of the year.
- **Item Code:** Displays the item code as defined in the Item Master Data.
- **Go button:** After changing the item code and month click this button to refresh the view of the calendar report.
- **Calendar Grid:** The data shown in the cell of calendar is the status of an item on that particular day of the month.
- **Legends:** Specify the color used to denote different categories of item availability.

### Quantity Breakup Form

The quantity Breakup form is used to specify the information of the quantity of the items in warehouse, as shown in Figure Rental 15.6.1

- On the double click of each cell a Quantity breakup window gets displayed.



Whse Code	Quantity
	0.00

Figure Rental 15.6.1: Availability Report – Quantity Breakup

The various fields in the Availability Report form are as follows:

- **Item Code:** Displays the item code for which the data is displayed in the available calendar view.
- **Inventory Type:** This drop down lists the various Inventory types like Available, Committed, Rented, Reserved or Vehicle.
- **Detail Grid:** The Grid shows details of Inventory quantity and allows drill down to order and warehouse level.

### Viewing the Graphical Availability Report

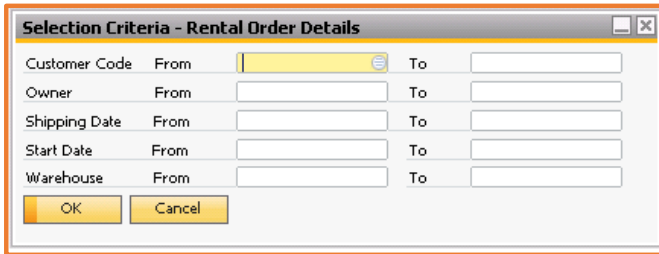
Let's perform the following steps to view the Graphical Availability Report:

1. User can view the graphical availability report by selecting an item line and clicking the "Availability" button on the rental quotation or Rental Order window. In this method, all parameters will automatically be picked up from the line item and selecting the graphical view check box.
2. User can click the Rental Reports → Availability. Enter the appropriate item code / range, item group and date / range and selecting graphical view check box.

*Note: Please note that the item code is mandatory to view "Graphical Availability Report".*

### Working with Rental Order Details Report

The Rental Order Details Report is used to display the details of the order. It can further drill down to the owner, order status, shipment period and the total value for that order. In order to view the Rental Order details report, select the Rental Order details menu option in the rental reports menu. The Rental Order Details form gets displayed, as shown in Figure Rental 15.8.1:



**Figure Rental 15.8.1: Selection Criteria - Rental Analysis**

The various fields in the Rental Order Details form are as follows:

- **Customer Code From / To:** Enter the customer code / range, as defined in the business partner master data, for who you wish to see Rental Order details.
- **Owner From / To:** Enter the owner / range who you wish to include in Rental Order details.
- **Shipping Date From / To:** Enter the shipping date / range for the rental period for which you wish to display the Rental Order details.
- **Start Date From / To:** Enter the start date / range for the rental period for which you wish to display the Rental Order details.
- **Warehouse From / To:** Enter the warehouse / range for the rental period for which you wish to display the Rental Order details.

Let's perform the following steps to specify the information in the Selection Criteria Rental Order Details form:

- Choose the customer code / range.
- Choose the owner / range.
- Choose the shipping date / range.
- Choose the start date / range.
- Choose the warehouse / range.

**Note:** Please note that it is mandatory to enter at least one of the above parameters.

The system checks the following before showing the Rental Order details report:

- Customer(s) that falls between the ranges specified in the selection criteria.
- Owner / range, that fall between the ranges specified in the selection criteria.
- Shipping date / range, that fall between the ranges specified in the selection criteria.
- Start date / range, that fall between the ranges specified in the selection criteria.
- Warehouse / range, that fall between the ranges specified in the selection criteria.

Then, all the line items that meet the above selection criteria are shown in the Analysis Report Screen.

### Rental Order Details Report Screen

Customer	Name	Owner	Status	Warehouse	Document No.	Start Date	Shipping Date	Document Total	Remarks
CMR	ABC Ltd		Open	Q2	12	09/01/15	09/01/15	\$ 1200.00	Based on Quotation no. 11
					17	09/02/15	09/02/15	\$ 42.00	Based on Quotation no. 19
					20	09/03/15	09/03/15	\$ 294.00	
					23	09/03/15	09/03/15	\$ 9.00	
			Rented	Q2	4	04/29/15	04/29/15	\$ 300.00	Based on Quotation no. 3
					5	04/29/15	04/29/15	\$ 60.00	Based on Quotation no. 4
					6	04/29/15	04/29/15	\$ 60.00	
					7	05/06/15	05/06/15	\$ 60.00	Based on Quotation no. 5
					16	09/02/15	09/02/15	\$ 20.00	Based on Quotation no. 18
					21	09/02/15	09/02/15	\$ 50.00	
					24	09/03/15	09/03/15	\$ 20.01	
					27	09/08/15	09/08/15	\$ 20.00	
					28	09/11/15	09/11/15	\$ 150.40	Based on Quotation no. 20
					31	09/23/15	09/23/15	\$ 40.00	
					36	11/02/15	11/02/15	\$ 19.00	
					37	11/02/15	11/02/15	\$ 40.00	
					38	11/02/15	11/02/15	\$ 40.00	

Figure Rental 15.9.1: Rental Order Details Report

The various fields in the Rental Order Details form are as follows:

- **Customer:** Displays the customer code as defined in the Business Partner Master Data.
- **Name:** Displays the name of the customer as defined in the Business Partner Master Data.
- **Owner:** Displays the code of the employee who owns the order.
- **Status:** Displays the status of the order i.e. – Rented or Open.
- **Warehouse:** Displays the code of the rented warehouse.
- **Document No.:** Displays the order number of the Rental Order.
- **Start Date:** Displays the start date of the rental period.
- **Shipping Date:** Displays the date of shipment of the rental items.
- **Document Total:** Displays the total value of the Rental Order.
- **Remarks:** Displays the remarks on the Rental Order.

### Viewing the Rental Order Details Report

User can click the Rental Reports → Rental Order Details.

Enter the appropriate customer code / range, owner / range, group and shipping date / range, start date / range and warehouse / range.

**Note:** Please note that it is mandatory to enter at least one of the above mentioned parameters to view “Rental Order Details Report”.

### Toolbox operations on Rental Order Details Report

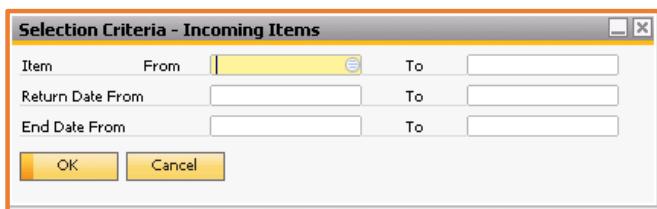


Figure Rental 15.21.1 Rental Order Details Report

The Print Preview, Print and Email tools can be used for Rental Order Details Report.

## Incoming Rental Items

The Incoming Rental Item Report is used to view the return and remaining quantities of selected rental items. In order to view the incoming rental items report, click the Incoming Rental Items menu option in the rental reports menu. This will open the Selection Criteria – Incoming Rental Items form (Figure Rental 15.11.1).



**Figure Rental 15.11.1: Selection Criteria - Incoming Rental Items**

The various fields in the Selection Criteria Incoming Items form are as follows:

- Item From / To: Enter the item code / range, as defined in the item master data, for which you wish to see incoming rental items report.
- Return Date From / To: Enter the return date / range for the rental period for which you wish to see incoming rental items report.
- End Date From / To: Enter the end date / range for the rental period for which you wish to see incoming rental items report.

Let's perform the following steps to specify the information in the Selection Criteria Incoming Items form:

- Choose Item / range.
- Choose return date / range.
- Choose end date / range.

**Note:** Please note that it is mandatory to enter at least one of the above parameters.

The system checks the following before showing the incoming rental items report:

- Item(s) that fall within the range of the selection criteria.
- Return date / range, that fall between the ranges specified in the selection criteria.
- End date / range, that fall within the ranges specified in the selection criteria.

Then, all the line items that meet the above selection criteria are shown in the Incoming Rental Items Report Screen.

### Incoming Rental Items Report Screen

CardCode	Card Name	Return Date	Document No.	Item No.	Item Description	Required Quantity	Delivered Quantity	Returned / Consumed	Balance Quantity
▼ C20000	▼ Norm Thomps	▼ 10/24/2013		▼ 4	Transit Mixer Transit Mixtures	2.000	2.00	0.00	2.00
		▼ 10/25/2013		▼ 5	Transit Mixer Transit Mixtures	2.000	2.00	0.00	2.00
				▼ 6	Transit Mixer Transit Mixtures	2.000	2.00	0.00	2.00
				▼ 9	Transit Mixer Transit Mixtures	2.000	1.00	0.00	1.00
				▼ 10	Wheel Loader Wheel Loader	1.000	1.00	0.00	1.00
		▼ 10/28/2013		▼ 14	Transit Mixer Transit Mixtures	1.000	1.00	0.00	1.00
				▼ 17	Transit Mixer Transit Mixtures	1.000	1.00	0.00	1.00
				▼ 18	Transit Mixer Transit Mixtures	1.000	1.00	0.00	1.00
		▼ 11/24/2013		▼ 2	Transit Mixer Transit Mixtures	2.000	2.00	0.00	2.00
		▼ 11/29/2013		▼ 21	Transit Mixer Transit Mixtures	1.000	1.00	0.00	1.00
		▼ 12/28/2013		▼ 13	Transit Mixer Transit Mixtures	1.000	1.00	0.00	1.00
		▼ 02/17/2014		▼ 25	Dumper Dumper Trucks	1.000	1.00	0.00	1.00
		▼ 02/18/2014		▼ 25	Dumper Dumper Trucks	1.000	1.00	0.00	1.00
				▼ 27	Diesel Pumps Diesel Pumpsset	1.000	1.00	0.00	1.00
		▼ 02/19/2014		▼ 28					



### Figure Rental 15.12.1: Incoming Rental Items

The various fields in the Incoming Rental Items form are as follows:

- **Return Date:** Displays the return date of the items on the Rental Order.
- **Document No.:** Displays the order number of the Rental Order.
- **Item No.:** Displays the item number as defined in the Item Master Data.
- **Item Description:** Displays the item description as defined in the Item Master Data.
- **Required Quantity:** Displays the required quantity on the Rental Order.
- **Delivered Quantity:** Displays the quantity delivered to the customer till date against the Rental Order.
- **Returned / Consumed:** Displays the quantity of an item returned or consumed till date against the Rental Order.
- **Balance Quantity:** Displays the remaining quantity to be returned from the customer against the Rental Order.

#### Viewing the Incoming Rental Items

User can click the Rental Reports Incoming Rental Items. Enter the appropriate item code / range, return date / range and end date / range.

**Note:** Please note that it is mandatory to enter at least one of the above mentioned parameters to view "Analysis Report".

#### Toolbox operations on Incoming Rental Items Report

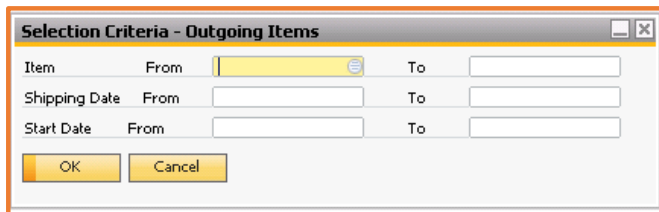


Figure Rental 15.21.1 Incoming Rental Items Report

The Print Preview, Print and Email tools can be used for Incoming Rental Items Report.

### Outgoing Rental Items

The Outgoing Rental Item report is used to view the delivered quantities and remaining quantities to be delivered against the required quantity of selected rental items. In order to view the outgoing rental items report, click the Outgoing Rental Items menu option in the rental reports menu. This will open the Selection Criteria – Outgoing Rental Items form, as shown in Figure Rental 15.14.1



**Figure Rental 15.14.1: Selection Criteria – Outgoing Rental Items**

The various fields in the Selection Criteria Outgoing Items fields are as follows:

- Item From / To: Enter the item code / range, as defined in the Item Master Data, for which you wish to see incoming rental items report.
- Shipping Date From / To: Enter the shipping date / range for the rental period for which you wish to see incoming rental items report.
- Start Date From / To: Enter the start date / range for the rental period for which you wish to see incoming rental items report.

Let's perform the following steps to specify the information in the Selection Criteria Outgoing Items form:

- Choose Item / range.
- Choose shipping date / range.

- Choose start date / range.

**Note:** Please note that it is mandatory to enter at least one of the above parameters.

The system checks the following before showing the incoming rental items report:

- Item(s) that fall within the range of the selection criteria.
- Shipping date / range, that fall between the ranges specified in the selection criteria.
- Start date / range, that fall within the ranges specified in the selection criteria.

Then, all the line items that meet the above selection criteria are shown in the Outgoing Rental Items Report Screen:

### Outgoing Rental Items Report

CardCode	Card Name	Shipping Date	Document No.	Item No.	Item Description	Required Quantity	Delivered Quantity	Balance Quantity
C20000	Norm Thomps	10/24/2013		4	Transit Mixtur Transit Mixtures	2,000	2,000	0.00
		10/25/2013		5	Transit Mixtur Transit Mixtures	2,000	2,000	0.00
				6	Transit Mixtur Transit Mixtures	2,000	2,000	0.00
				9	Transit Mixtur Transit Mixtures	2,000	1,000	0.00
				10	Wheel Loader Wheel Loader	1,000	1,000	0.00
		10/26/2013		2	Transit Mixtur Transit Mixtures	2,000	2,000	0.00
		10/28/2013		13	Transit Mixtur Transit Mixtures	1,000	1,000	0.00
				14	Transit Mixtur Transit Mixtures	1,000	1,000	0.00
				17	Transit Mixtur Transit Mixtures	1,000	1,000	0.00
				18	Transit Mixtur Transit Mixtures	1,000	1,000	0.00
				19	Transit Mixtur Transit Mixtures	1,000	1,000	0.00
		10/29/2013		21	Transit Mixtur Transit Mixtures	1,000	1,000	0.00
		02/15/2014						

**Figure Rental 15.15.1: The Outgoing Rental Items Report**

The various fields in the Outgoing Rental form are as follows:

- **Shipping Date:** Displays the shipping date of the items on the Rental Order.
- **Document No.:** Displays the order number of the Rental Order.
- **Item No.:** Displays the item number as defined in the Item Master Data.
- **Item Description:** Displays the item description as defined in the Item Master Data.
- **Required Quantity:** Displays the required quantity on the Rental Order.
- **Delivered Quantity:** Displays the quantity delivered to the customer till date against the Rental Order.
- **Balance Quantity:** Displays the remaining quantity to be delivered to the customer against the Rental Order.

### Viewing the Outgoing Rental Items Report

1. User can click the *Rental Reports* → *Outgoing Rental Items*. Enter the appropriate item code / range, shipping date / range and start date / range.

**Note:** Please note that it is mandatory to enter at least one of the above mentioned parameters to view “Analysis Report”.

### Toolbox operations on Outgoing Rental Items Report



**Figure Rental 15.21.1 Outgoing Rental Items Report**

The Print Preview, Print and Email tools can be used for Outgoing Rental Items Report.



The various fields in the Selection Criteria Delivery Note form are as follows:

- **Invoicing Date:** Enter the date on which you wish to process the invoice.
- **Customer From / To:** Select the customer number / range as defined in the Business Partner Master Data (this is to specify only those customers you wish to invoice).
- **Rental Order From / To:** Select the Rental Order number / range for which you wish to process the invoice.
- **Location From / To:** Select the location / range for which you wish to process the invoice.

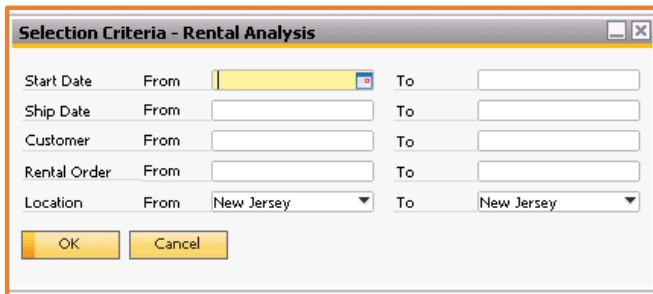
Let's perform the following steps to process an invoice:

1. Enter the date range for the deliveries made.
2. Enter the Customer / Customers.
3. Enter the Rental Order / Orders.
4. Enter the Location / Locations.
5. Select the delivery type.
6. Click OK.

On the basis of given selection criteria, the printable format of delivery report is generated.

### **Working with Rental Analysis Report**

Rental Analysis displays overall analysis of the Rental Order with the service call expense details. It displays Rental Order amount, total invoiced amount, total service call expense detailed report for related Rental Order and overall gross profit given by the rental or the customer. The Rental Analysis - Selection Criteria form gets displayed, as shown in Figure Rental 15.18.1:



**Figure Rental 15.18.1: Selection Criteria - Rental Analysis**

The various fields in the Rental Analysis form are as follows:

- **Ship Date From / To:** Enter the shipping date / range for the rental period for which you wish to do the analysis.
- **Start Date From / To:** Enter the start date / range for the rental period for which you wish to do the analysis.
- **Customer Code From / To:** Enter the customer code / range, as defined in the Business Partner Master Data, for who you wish to see rental analysis.
- **Rental Order From / To:** Select the Rental Order number / range for which you wish to process the invoice.
- **Location From / To:** Select the location / range for which you wish to process the invoice.

All the line items that meet the above selection criteria are shown in the Rental Analysis Report Screen:

## Rental Analysis (Summary) Report Screen

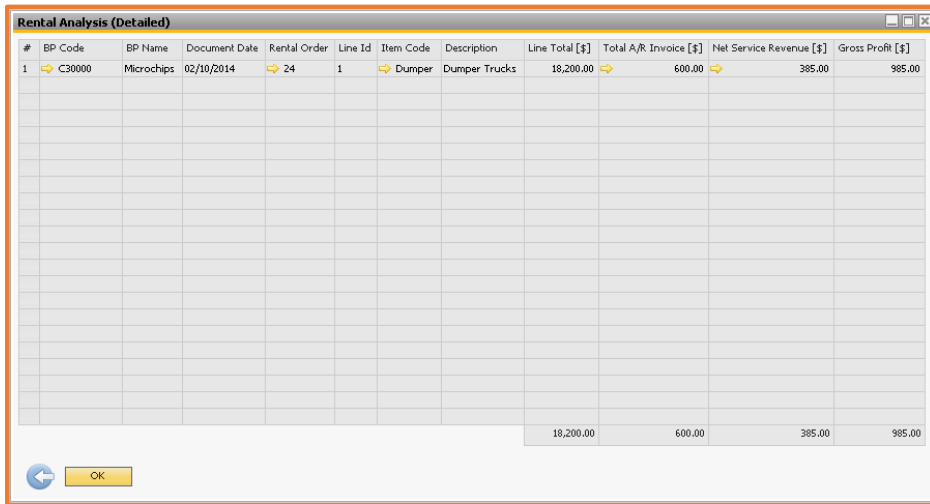
Rental Analysis (Summary)								
Double-click row number for a detailed report								
#	BP Code	BP Name	Document Date	Rental Order	Rental Amount [\$]	Total A/R Invoice [\$]	Net Service Revenue [\$]	Gross Profit [\$]
1	C20000	Norm Thompson	10/23/2013	1	110.00	110.00	0.00	110.00
2	C20000	Norm Thompson	10/25/2013	10	150.00	0.00	0.00	0.00
3	C20000	Norm Thompson	10/28/2013	13	9,300.00	4,950.00	0.00	4,950.00
4	C20000	Norm Thompson	10/28/2013	14	150.00	4,950.00	0.00	4,950.00
5	C20000	Norm Thompson	10/28/2013	17	1,150.00	300.00	0.00	300.00
6	C20000	Norm Thompson	10/28/2013	18	1,150.00	0.00	0.00	0.00
7	C20000	Norm Thompson	10/28/2013	19	150.00	0.00	0.00	0.00
8	C20000	Norm Thompson	10/24/2013	2	9,000.00	0.00	0.00	0.00
9	C20000	Norm Thompson	10/29/2013	20	600.00	300.00	0.00	300.00
10	C20000	Norm Thompson	10/29/2013	21	4,800.00	0.00	0.00	0.00
11	C30000	Microchips	02/10/2014	24	18,200.00	600.00	385.00	985.00
12	C20000	Norm Thompson	02/17/2014	25	600.00	0.00	0.00	0.00
13	C20000	Norm Thompson	02/18/2014	26	500.00	0.00	0.00	0.00
14	C20000	Norm Thompson	02/15/2014	27	400.00	0.00	0.00	0.00
15	C20000	Norm Thompson	02/19/2014	28	100.00	0.00	0.00	0.00
16	C20000	Norm Thompson	02/19/2014	29	400.00	0.00	0.00	0.00
17	C23900	Parameter Technology	10/24/2013	3	9,600.00	0.00	0.00	0.00
18	C20000	Norm Thompson	02/19/2014	30	200.00	0.00	0.00	0.00
19	C20000	Norm Thompson	02/19/2014	31	300.00	0.00	0.00	0.00
20	C20000	Norm Thompson	10/24/2013	4	300.00	0.00	0.00	0.00
21	C20000	Norm Thompson	10/25/2013	5	300.00	0.00	0.00	0.00
22	C20000	Norm Thompson	10/25/2013	6	300.00	0.00	0.00	0.00
23	C20000	Norm Thompson	10/25/2013	7	300.00	9,600.00	0.00	9,600.00
24	C20000	Norm Thompson	10/25/2013	8	810.00	810.00	0.00	810.00
25	C20000	Norm Thompson	10/25/2013	9	270.00	135.00	0.00	135.00
					59,140.00	21,755.00	385.00	22,140.00

Figure Rental 15.19.1 Rental Analysis (Summary) Report

The various fields in the Rental Analysis (Summary) form are as follows:

- **BP Code:** Displays the customer code as defined in the Business Partner Master Data.
- **BP Name:** Displays the name of the customer as defined in the Business Partner Master Data.
- **Document Date:** Displays the posting date of the Rental Order.
- **Rental Order:** Displays the order number of the Rental Order.
- **Rental Amount:** Displays total rental amount of the rental period.
- **Total A/R Invoice:** Displays total invoiced amount of the Rental Order.
- **Service Expense:** Displays total service expense amount of the Rental Order.
- **Gross Profit:** Displays gross profit earned against a Rental Order.

**Note:** User can view detailed report of the Rental Order displayed in the Rental Analysis (summary) by double clicking on the row (Fig Rental 15.19.1 Rental Analysis - Detail).



#	BP Code	BP Name	Document Date	Rental Order	Line Id	Item Code	Description	Line Total [\$]	Total A/R Invoice [\$]	Net Service Revenue [\$]	Gross Profit [\$]
1	C30000	Microchips	02/10/2014	24	1	Dumper	Dumper Trucks	18,200.00	600.00	385.00	985.00
								18,200.00	600.00	385.00	985.00

**Figure Rental 15.19.2 Rental Analysis (Detailed) Report**

The various fields in the Rental Analysis (Detailed) form are as follows:

- **BP Code:** Displays the customer code as defined in the Business Partner Master Data.
- **BP Name:** Displays the name of the customer as defined in the Business Partner Master Data.
- **Doc Date:** Displays the posting date of the Rental Order.
- **Rental Order:** Displays the order number of the Rental Order.
- **Line Id.:** Displays the line id of the Rental Order.
- **Line Total:** Displays total rental amount of the line item.
- **Total A/R Invoice:** Displays total invoiced amount of the line item.
- **Service Expense:** Displays total service expense amount of the line item.
- **Gross Profit:** Displays gross profit earned against a line item.



**Note:** User can view service expense details report line item displayed in the Rental Analysis (Details) by clicking on the yellow button attached with the Service Expense (Fig Rental 15.19.1 Rental Analysis - Detail).

#	BP Code	BP Name	Document Date	Rental Order	Line Id	Service Call Id	Item Code	Description	Document Type	Document Number	Total A/R Invoice [\$]	FG Cost [\$]	Total A/R Credit Memo [\$]	FG Cost (Reverse) [\$]	Labor Cost [\$]	Total
1	C10000	Microchips	02/10/2014	24	1	29	Dumper	Dumper Trucks	A/R Invoice	235	562.50	302.89	0.00	0.00	10.00	249.61
2	C10000	Microchips	02/10/2014	24	1	29	Dumper	Dumper Trucks	A/R Credit Memo	11	0.00	0.00	10.00	0.00	0.00	-10.00
3	C10000	Microchips	02/10/2014	24	1	30	Dumper	Dumper Trucks	A/R Invoice	236	312.50	151.95	0.00	0.00	10.00	150.55
4	C10000	Microchips	02/10/2014	24	1	30	Dumper	Dumper Trucks	Sales Order	246	-5.16	0.00	0.00	0.00	0.00	-5.16
											869.84	454.84	10.00	20.00	305.00	

**Figure Rental 15.19.3 Rental Analysis (Detailed Net Service Revenue)**

The various fields in the Rental Analysis (Detailed Net Service Revenue) form are as follows:

- **BP Code:** Displays the customer code as defined in the Business Partner Master Data.
- **BP Name:** Displays the name of the customer as defined in the Business Partner Master Data.
- **Doc Date:** Displays the posting date of the Rental Order.
- **Rental Order:** Displays the order number of the Rental Order.
- **Line ID.:** Displays the line ID of the Rental Order.
- **Service Call ID.:** Displays service call ID of the line item.
- **Item Code:** Displays item code of the service call expense.
- **Description:** Displays item description of the service call expense.
- **Document Type:** Displays document type created for service call expense.
- **Document Number:** Displays document number created for service call expense.

- **Total A/R Invoice:** Displays total invoiced amount of service call expense.
- **FG Code:** Displays finished goods amount of service call expense.
- **Total A/R Credit Memo:** Displays total credit memo of service call expense.
- **FG Code (Reverse):** Displays finished goods amount of credit memo of service call.
- **Labor Cost:** Displays labor cost of service call expenses.
- **Gross Profit:** Displays gross profit earned against a line item.
- 

### Viewing the Rental Analysis Report

The User can click the *Rental Reports* → *Rental Analysis*. Enter the appropriate start date / range, ship date/ range, customer / range, Rental Order number / range and location / range.

### Toolbox operations on Rental Analysis Report

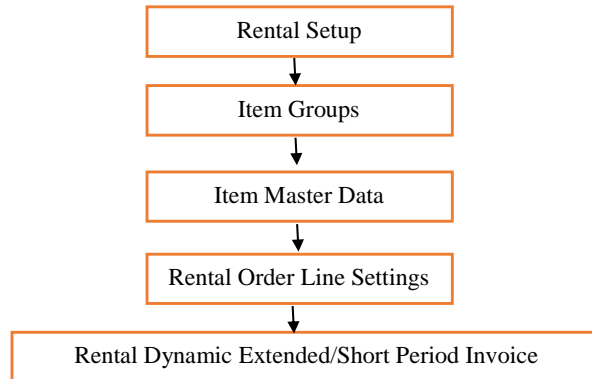


Figure Rental 15.21.1 Service Expense Details Report

The Print Preview, Print and Email tools can be used for Rental Analysis Report.

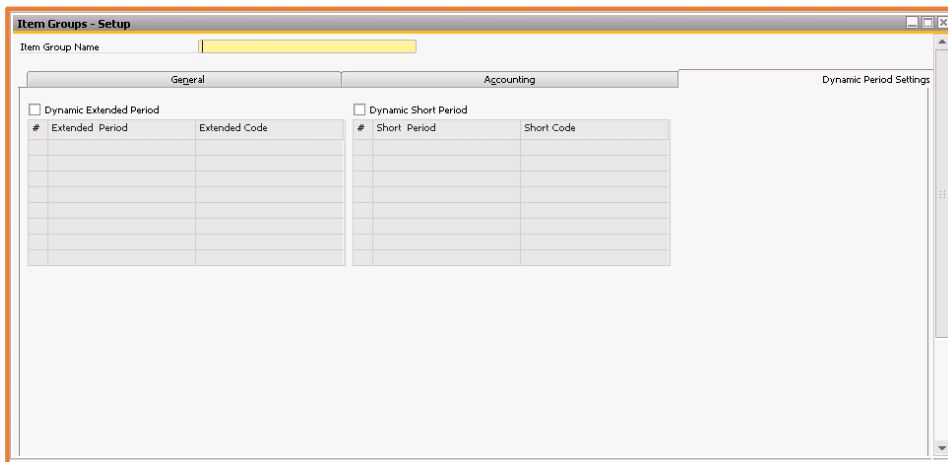
### Dynamic Invoicing Calculations

Dynamic invoicing calculation would be based on the hierarchy of the Rental Dynamic Extended/Short Period settings on [Rental Setup](#), Item Group, Item Master Data and [Rental Order Line](#) Level.



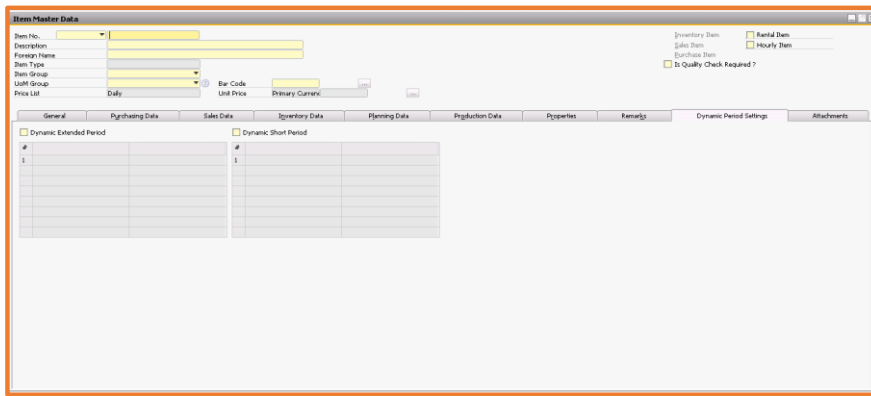
**Figure Rental 16.1 Service Expense Details Report**

- **Item Groups:** User can set dynamic period invoice settings on the Item Groups.



**Figure Rental 16.2 Dynamic Period Settings on Item Groups**

- **Item Master Data:** User can set dynamic period invoice settings on the Item Master Data.



Dynamic Extended Period		Dynamic Short Period	
#		#	
1		1	

Figure Rental 16.2 Dynamic Period Settings on Item master data

## Enabling Approvals on Rental Documents

A User can set approval procedures on Rental Documents if user checked “**Activate Approval Procedures**”.

*On Rental Setup – Rental Approval tab.*

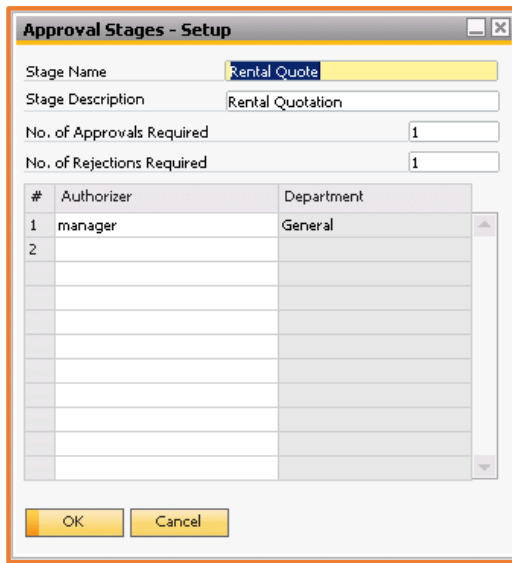
### Approval Stages -Setup

As an authorizer (manager/senior member) you can create an approval stage that can be assigned to one or more approval procedure templates, including which users may approve specific transactions and how many authorizers are required. You can assign an approval stage to one or more approval procedure templates as shown in Figure Rental 71.1 Approval Stages – Setup.

The various fields in the Approval Stages - Setup form are as follows:

- **Stage Name:** User can set the stage name.
- **Stage Description:** Description of the stage.
- **No. Of Approvals Required:** No. Of Approvals required to approve rental document to approve in the current stage.

- **No. Of Rejections Required:** No. Of Rejections required to reject rental document to reject in the current stage.
- **Authorizer:** User which are supposed to approve/reject the document relate to the current stage.
- **Department:** Displays department of the selected user.



#	Authorizer	Department
1	manager	General
2		

Figure Rental 17.1 Approval Stages - Setup

### Approval Procedures -Setup

You can create Approval Procedures as shown in *Figure Rental 71.2 Approval Stages – Setup*  
 The various fields in the Approval Templates - Setup form are as follows:

- **Name:** Name of the template.
- **Description:** Description of the current approval template.
- **Active:** If checked it shows current template is active.

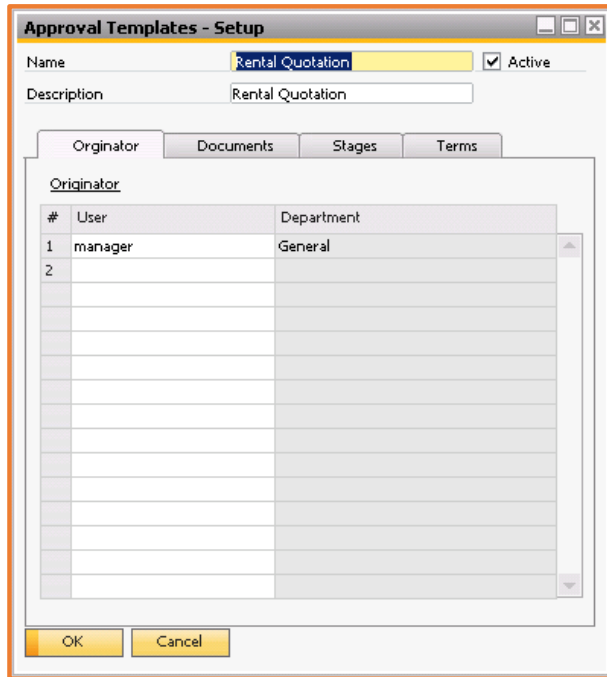


Figure Rental 17.2 Approval Procedures

### Approval Procedures –Setup - Originator Tab

The various fields in the Approval Templates – Setup – Originator Tab are as follows:

- **User:** User which is the originator of rental document.
- **Department:** Displays department of the selected user.

### Approval Procedures –Setup - Documents Tab

User can set the documents on which the current approval procedure would be applied. The various fields in the Approval Templates – Setup – Documents Tab are as follows:

- **UDO ID:** Select the UDO Id of the document.
- **Name:** Displays name of the document’s UDO.

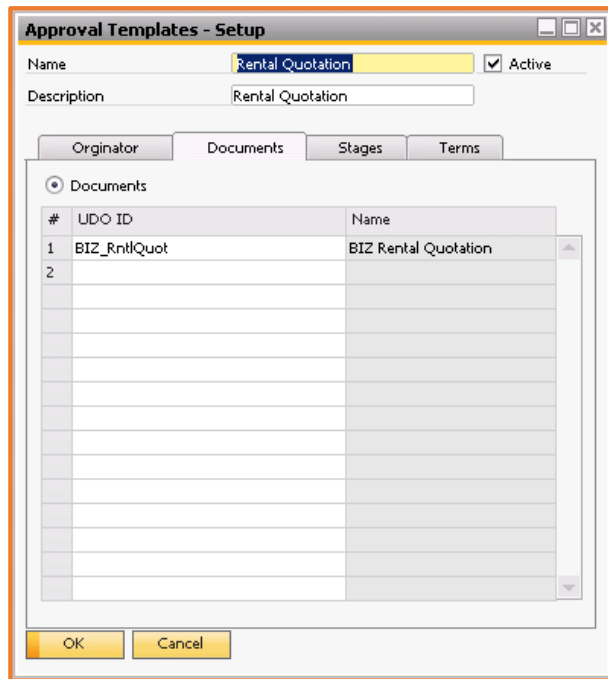
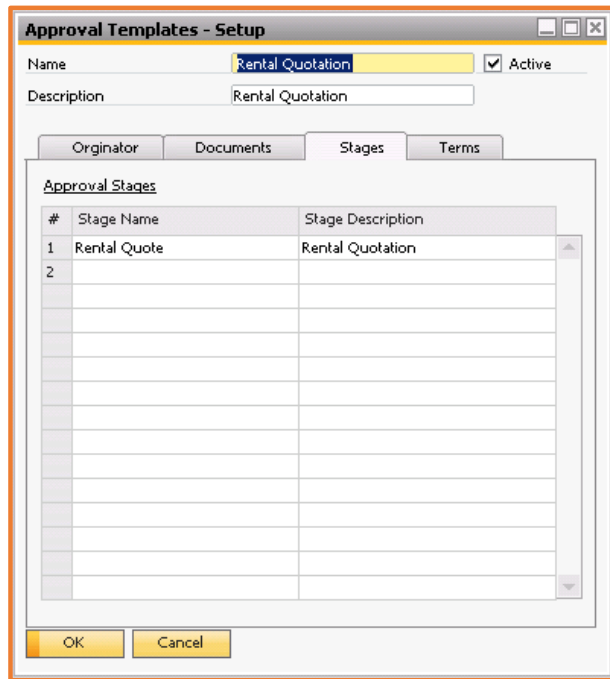


Figure Rental 17.2.2 Documents Tab

**Approval Procedures –Setup - Stages Tab**

User can set the stages which will take part in the current approval procedure. The various fields in the Approval Templates – Setup – Stages Tab are as follows:

- **Stage Name:** Select stage name which would be applied on current approval template.
- **Stage Description:** Description of the selected stage.



**Figure Rental 17.2.3 Stages Tab**

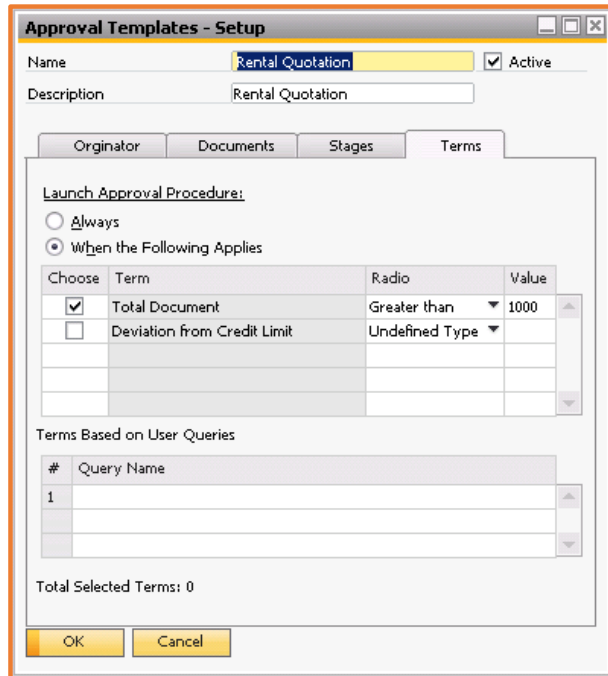
**Approval Procedures –Setup - Terms Tab**

User can set the terms for current approval procedure. The various fields in the Approval Templates – Setup – Terms Tab are as follows:

- **Launch Approval Procedure:** This setting would be used when approval procedure would be applied on rental documents. There are two options:
  - **Always:** Always launch this approval procedure.
  - **When the following applies:** User can set the conditions here on which this approval procedure would be launch on related rental document.



- **Terms based on User Queries:** User can specify user queries here to launch this approval procedure.



**Approval Templates - Setup**

Name: Rental Quotation  Active

Description: Rental Quotation

Originator Documents Stages **Terms**

Launch Approval Procedure:

Always

When the Following Applies

Choose	Term	Radio	Value
<input checked="" type="checkbox"/>	Total Document	Greater than	1000
<input type="checkbox"/>	Deviation from Credit Limit	Undefined Type	

Terms Based on User Queries

#	Query Name
1	

Total Selected Terms: 0

OK Cancel

**Figure Rental 17.2.4 Terms Tab**

### Approval/Rejection of a rental document draft

When a user adds a new rental document, the system will pick an appropriate approval procedure and prompt it to the user, after submission of the users system will create a Rental Document draft and will send an alert to the approver defined in the Approval Stages – Setup.

The approver will receive an alert to approve/reject the document as shown in the Figure Rental 17.3.1 Message/Alerts Overview.

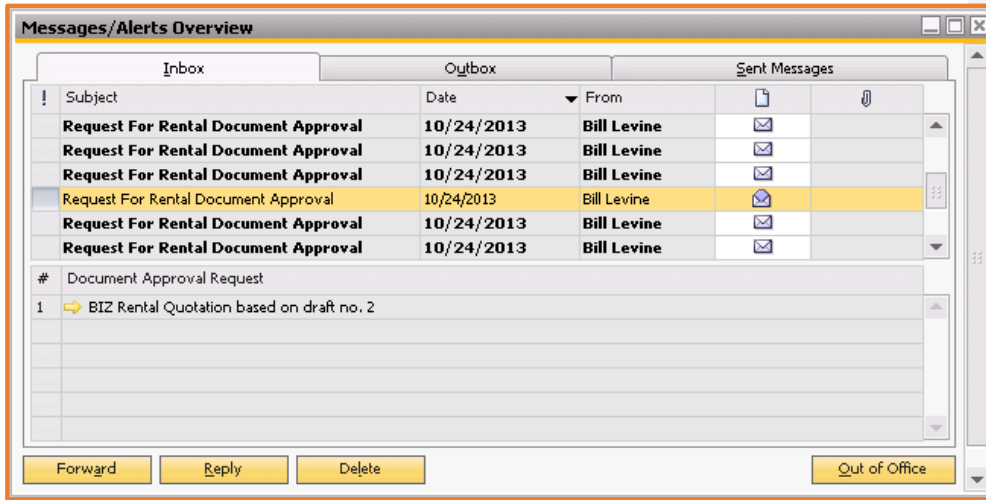
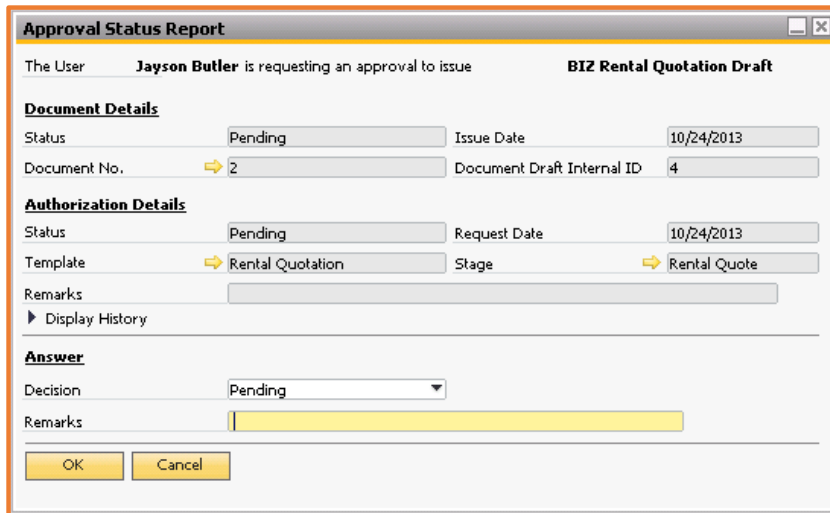


Figure Rental 17.3.1 Message/Alerts Overview

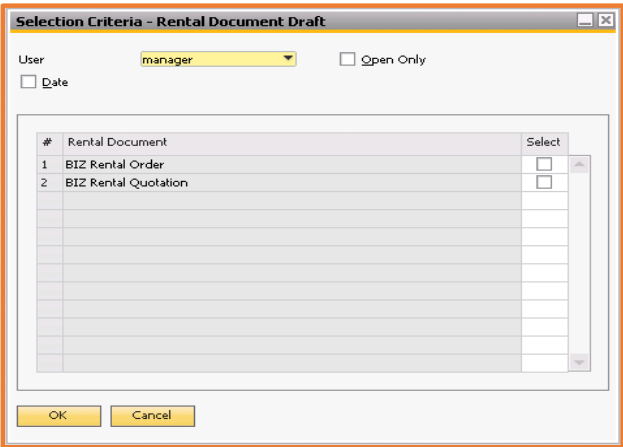
When the approver clicks on Document Approval Request's yellow arrow, a window will be opened to approve/reject rental document as shown in Figure Rental 17.3.2 Approval Status Report.



**Figure Rental 17.3.2 Approval Status Report**

**Rental Document Draft**

After requesting approval for the rental document, sthe system will create rental document draft, which can be displayed by choosing *Rental > Rental Reports > Document Draft Report*.



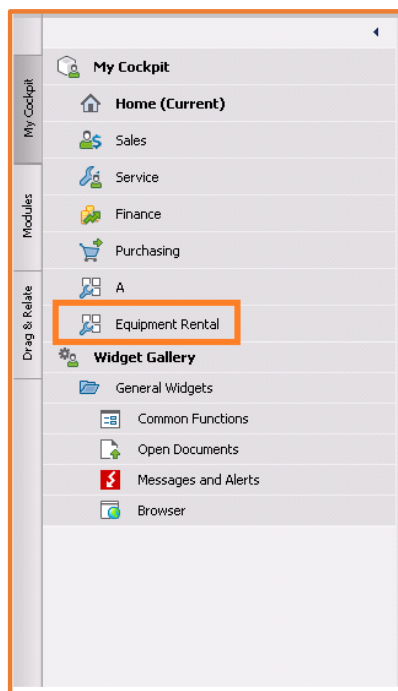
**Figure Rental 17.4 Selection Criteria – Rental Document Draft**

Rental Document Draft										
#	Doc Entry	BP Code	Create Date	Posting Date	Status	Discount Percent	Discount Amount	Exp Amount	Doc Total	Remarks
1	→ 7	Parameter Technology	10/25/2013	10/25/2013	O	0.00	\$ 0	\$ 0	\$ 1,590.00	
2	→ 8	Norm Thompson	10/25/2013	10/25/2013	O	0.00	\$ 0	\$ 0	\$ 1,590.00	
3	→ 1	Norm Thompson	10/23/2013	10/23/2013	C	0.00	\$ 0	\$ 0	\$ 116.60	

Figure Rental 17.4 Rental Document Draft

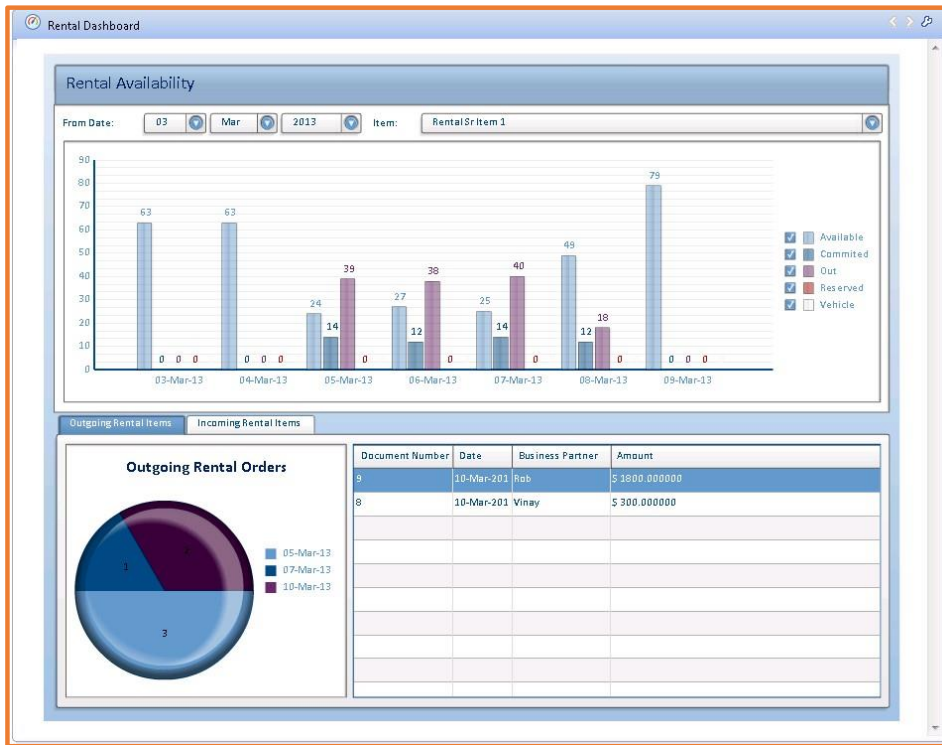
## Rental Dashboard

The Rental Dashboard displays Rental Availability, Outgoing rental items, Incoming rental items, Rental Orders of the Incoming / Outgoing Rental Orders for the selected item on the basis of selected date. It displays only 7 days data from the selected date. To view Rental Dashboard click on My Cockpit, select Rental and drag Dashboard on the screen.



**Figure Rental 17.1 My Cockpit**

**Rental Dashboard would be displayed:**

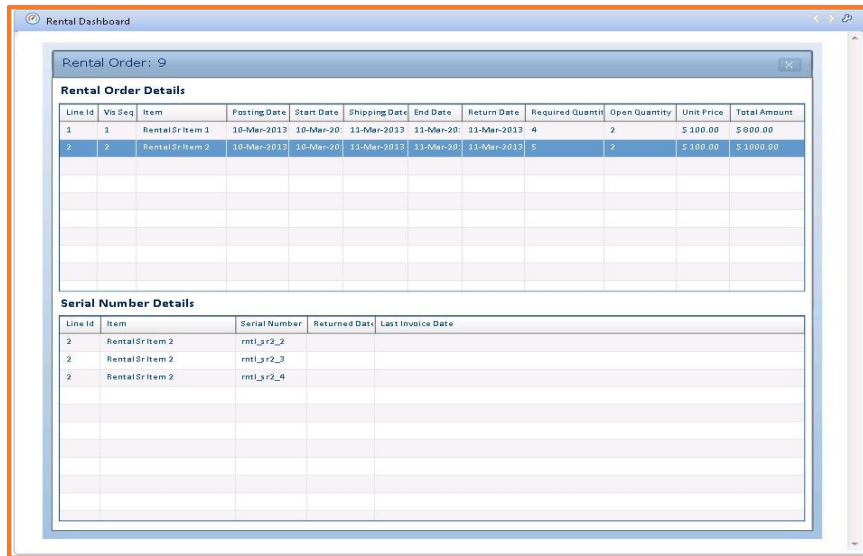


**Figure Rental 16.2 Rental Dashboard**

The various areas in the rental dashboard are as follows:

1. **Rental Availability:** It displays rental availability of the item selected in the item list box. 7 days data would be displayed in the rental dashboard from the selected date. User can select the “from date” by selecting the date combo boxes. User can also choose the availability parameter to display in the bar chart.

2. **Outgoing Rental Items:** It displays the outgoing rental item within 7 days from the selected dates. The pie chart displays the date wise Rental Orders which are going to be rented in 7 days. User can display the date with Rental Order details in the matrix by clicking on the Pie.
3. **Incoming Rental Items:** It displays the incoming rental item within 7 days from the selected dates. The pie chart displays the date wise Rental Orders which are coming back in next 7 days. User can display the date with Rental Order details in the matrix by clicking on the Pie.
4. User can see the line detail of the Rental Order by clicking on the Matrix row (Figure Rental 16.2 Rental Dashboard).
5. After clicking on the matrix in Figure Rental 16.2. Dashboard will display line wise Rental Order detail in the other matrix (Figure Rental 16.3 Rental Order Details).
6. User can also see the serial number details by clicking on the line level of the Rental Order details shown in Fig 16.3 Rental Order Details.



Rental Order: 9											
Rental Order Details											
Line Id	Vis Seq	Item	Posting Date	Start Date	Shipping Date	End Date	Return Date	Required Quantity	Open Quantity	Unit Price	Total Amount
1	1	RentalSrItem 1	10-Mar-2013	10-Mar-20	11-Mar-2013	11-Mar-20	11-Mar-2013	4	2	\$ 100.00	\$ 600.00
2	2	RentalSrItem 2	10-Mar-2013	10-Mar-20	11-Mar-2013	11-Mar-20	11-Mar-2013	5	2	\$ 100.00	\$ 1000.00
Serial Number Details											
Line Id	Item	Serial Number	Returned Date	Last Invoice Date							
2	RentalSrItem 2	rnt1_s+r2_2									
2	RentalSrItem 2	rnt1_s+r2_3									
2	RentalSrItem 2	rnt1_s+r2_4									

**Figure Rental 16.3 Rental Order Details**