

# RENTAL ORDER PROCESSING

AcuRental streamlines your rental operations from generation of quotes or rental contracts in Sales Orders, CRM, Customer Portal, Service Orders, Mobile App or POS transactions. Schedule crew, create project tasks, project budgets (revenue and expense), or production work orders from rental order entry. Track time-based availability and multiple reservation of a S/N. Setup for each equipment check in/out inspections and scheduled services. Track equipment ROI, the purchase cost, revenue and expenses for repairs and maintenance by cost code using A/P Bills & repair Work Orders entry.

## COMPLETE RENTAL MANAGEMENT SOFTWARE

- **Flexible Invoicing Options.** Generate invoices upfront, periodically, upon return, set day of the month, set billing schedule, or project's billing terms. Exclude billing for holidays, weekends, or hiatus for billing by customer.
- **Time Based Availability.** View quantity available, on rental orders and on rent by item and drill down to orders to ship or return from rental dashboard.
- **User Defined Bill Code.** Price rentals based on user defined bill codes – daily, weekly, monthly, contractor month or based on hours / meter used. Auto calculate best price based on customer setting and rental period. Manage hourly rental billing based on time of the day rented and returned.
- **Inspections and Scheduled Services.** Ability to define required inspections (checklist) by rental equipment for rentals returned and to generate a repair document based on inspection results and set scheduled services settings.
- **Scan Shipments and Returns.** Track products staged/shipped by box and boxes loaded in each truck. Track time to stage and ship products by job.
- **Deposit and Damage Waiver Processing –** Setup deposit and damage waiver requirements by customers and deposit and waiver amount by item.

## KEY BENEFITS

### MORE OPPORTUNITIES

- Offers a complete solution using Sales, Crewing, Service, CRM, Project Accounting, Fixed Asset, Payroll and Financials in a cloud based multi-company and multi-currency platform
- Track status of each rental equipment, track inspection results and repair expenses for each equipment
- Generate rental orders from Field Service work orders. Process rentals on Field Service mobile app
- Generate work orders for repairs and scheduled services

### AUTO GENERATE INVOICES

- Auto generate invoices based on rental contract's billing term
- Show details of charges on the invoice – rate for month, week, day, metered usage, S/N, etc.

### PREPARE FOR THE DAY

- Use dashboard to view / drill down to orders to ship, invoice or to be returned for the entered date range.
- Support crew clock in/out and crew manager approval of timecards for field service orders, staging of jobs, and production work orders. Load data captured into Payroll.

**MISSING/DAMAGED RENTALS**

Order Type	Order No.	Customer	Customer Name	Location	Location Name	Inventory ID	Description	Status	UOM	Quantity	Rate	Item Price	Total
SO	5000045	ABWENTNCS	USA Barabending School	MAN	Primary Location	FR3CANTAL	Control Panel - Push Buttons	Missing	EA	1.00	100.00		100.00
SO	5000045	ABWENTNCS	USA Barabending School	MAN	Primary Location	7330	SBV Winding Screws - McCloskey	Missing	EA	1.00	2,200.00		2,200.00
SO	5000045	ABWENTNCS	USA Barabending School	MAN	Primary Location	5300	Tractor Machine	Missing	EA	1.00	2,200.00		2,200.00

**ITEMS ON RENT**

Inventory ID	Warehouse	Qty. On Rent	Qty. On Hand	Qty. Avail.
ABCMP101	BETL	1.00	3.00	200.00
ABCMP102	INCUSABLE	0.00	10.00	340.00
ABCMP103	INCUSABLE	1.00	4.00	20.00
ABCMP104	BETL	0.00	2.00	700.00
ABCMP105	INCUSABLE	0.00	0.00	900.00
ABCMP106	INCUSABLE	1.00	4.00	20.00
ABCMP107	BETL	3.00	11.00	13.00
ABCMP108	BETL	0.00	1.00	5.00

**ORDERS TO SHIP**

Order Type	Order No.	Status	Date	Sched. Shipment	Customer	Customer Name	Quantity	Amount	Currency
SO	5000042	Open	5/20/2021	5/20/2021	ABWENTNCS	USA Barabending School	2.00	619.20	USD
SO	5000043	Open	5/20/2021	5/20/2021	ABWENTNCS	USA Barabending School	1.00	120.00	USD
SO	5000044	Open	5/18/2021	5/18/2021	ABCUSLANS	ABC Holdings Inc	1.00	500.00	USD
SO	5000047	Open	5/18/2021	5/18/2021	ABWENTNCS	USA Barabending School	3.00	0.00	USD

**ORDERS TO RETURN**

Order Type	Order No.	Status	Date	Sched. Shipment	Customer	Customer Name	Quantity	Amount	Currency	Created On
SO	5000041	Shipping	6/11/2021	6/11/2021	ABWENTNCS	USA Barabending School	1.00	30,000.00	USD	6/11/2021
SO	5000039	Completed	5/20/2021	5/20/2021	ABWENTNCS	USA Barabending School	1.00	13.28	USD	5/20/2021

## RENTAL ORDER PROCESSING FEATURES AND CAPABILITIES

<b>Track Meter Reading for each Equipment</b>	Enter starting and ending meter reading for each equipment. Ability to force entry of meter reading during rental shipment and return entries.
<b>Equipment ROI</b>	Track purchase cost, expenses from AP and Service Orders and Revenue generated for each equipment.
<b>Cost Posting to GL &amp; Project Accounting</b>	Ability to post cost for rentals to GL and Project Accounting. Ability to generate invoices based on cost plus markup using project accounting.
<b>Manage Rental Check in / out &amp; Scheduled Services</b>	Ability to define needed inspections for check in/out and scheduled services. Manage the inspection process and track the result of each inspection.
<b>Crew Scheduling</b>	Schedule crew for each rental order line based on crew availability, skill and license requirements when integrated with Field Service module.
<b>View Order Activity and Swap Items, S/N and Billing Rates</b>	View when each line is entered, shipped, invoiced and returned. Swap item or serial numbers on rental contracts and change rental rates on existing rentals (price increases).
<b>Sell and Rent the Same Item</b>	Allows for selling and renting the same item. Ability to sell items on rent to customers. Swap defective product on rent.
<b>Create Projects and Production Work Orders</b>	Create projects and production work orders from rental contract entry based on project templates, and defined production options and routing steps.
<b>Invoice Missing and Damaged Items</b>	Generate an invoice to bill for missing and damaged items. Provide a grace period before billing customers for missing and damaged
<b>Rental Packages</b>	Create rental packages grouping rental, sales (consumable) and crewing (services / labor). Ability to price by package or individually.
<b>Process Sub-Rentals</b>	Ability to enter sub-rental amount, vendor and non-stock item during rental contract entry. Generate RTV document for rental returns.
<b>Rental Revenue Displays</b>	View rental revenue generated for any date range by item, customer or item class.
<b>Track information by Equipment</b>	Tracking return notes including pictures, days on rent, utilization and Acumatica's fixed asset and equipment IDs for each rental equipment.

### THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution today.

#### STREAMLINE OPERATIONS

**Manage your business more efficiently:**

- Automate processes
- Control workflows
- Access the system from anywhere on any device – including mobile
- Promote collaboration with all-inclusive user licensing

#### ADAPTABLE SOLUTION

**Add and extend:**

- Deploy in-house or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

#### YOUR BUSINESS ACCELERATED

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per user pricing – system scales as your business grows