

RENTAL ORDER PROCESSING

AcuRental streamlines your rental operations from generation of quotes or rental contracts in Sales Orders, CRM, Customer Portal, Service Orders or POS transactions. Schedule crew, create project tasks, budgets (both for revenue and expense), or production work orders from rental order entry. Track time based availability and reserve specific S/N for a rental. Setup for each equipment inspections (check in/out), scheduled service requirements and track expenses for repairs (A/P and repair work orders) in addition to original purchase cost and rental revenue by cost code and period.

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 customers what they are being invoiced for – rates, quantities and serial numbers

PREPARE FOR THE DAY

- Use dashboard to view orders to ship, to be returned or invoice for the entered range of dates. Drill down to rental transactions from rental dashboard
- Process multiple shipments for a rental order, set 1st order's ship date as billing date for all shipments

MISSING/DAMAGED RENTALS

Order Type	Order No.	Customer	Customer Name	Location	Location Name	Inventory ID	Description	Status	UOM	Quantity	Rate	Item Price	Total
SA	8200042	ABWENTNCS	USA Barworking School	MAN	Primary Location	FR3CANTAL	Control Panel - Push Buttons	Missing	EA	1.00	100.00		100.00
SA	8200043	ABWENTNCS	USA Barworking School	MAN	Primary Location	72300	SBM Winding Screws - MCClosure	Missing	EA	1.00	2,200.00		2,200.00
SA	8200045	ABWENTNCS	USA Barworking School	MAN	Primary Location	52800	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
8200042	BETEL	1.00	3.00	200.00
8200043	INCUSURGE	0.00	10.00	340.00
8200045	INCUSURGE	1.00	4.00	20.00
8200046	BETEL	0.00	2.00	700.00
8200047	INCUSURGE	0.00	0.00	800.00
8200048	INCUSURGE	1.00	4.00	20.00
8200049	BETEL	3.00	11.00	15.00
8200050	BETEL	0.00	1.00	5.00

ORDERS TO SHIP

Order Type	Order No.	Status	Date	Sched. Shipment	Customer	Customer Name	Quantity	Amount	Currency
SA	8200042	Open	5/20/2021	5/20/2021	ABWENTNCS	USA Barworking School	2.00	619.20	USD
SA	8200043	Open	5/20/2021	5/20/2021	ABWENTNCS	USA Barworking School	1.00	120.00	USD
SA	8200045	Open	5/19/2021	5/19/2021	ABCUSURGE	ABC Holdings Inc	1.00	500.00	USD
SA	8200047	Open	5/19/2021	5/19/2021	ABWENTNCS	USA Barworking 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
SA	8200042	Shipping	6/11/2021	6/11/2021	ABWENTNCS	USA Barworking School	1.00	30,000.00	USD	6/11/2021
SA	8200043	Completed	5/20/2021	5/20/2021	ABWENTNCS	USA Barworking School	1.00	13.28	USD	5/20/2021

RENTAL ORDER PROCESSING FEATURES AND CAPABILITIES

Track Meter Reading for each Equipment	Enter starting and ending meter reading for each equipment. Ability to force entry of meter reading during rental shipment and return entries.
Equipment ROI	Track purchase cost, expenses from AP and Service Orders and Revenue generated for each equipment.
Cost Posting to GL & Project Accounting	Ability to post cost for rentals to GL and Project Accounting. Ability to generate invoices based on cost plus markup using project accounting.
Inspect Items Returned	Ability to define inspection checklist by item, set equipment status based on inspection status.
Crew Scheduling	Schedule crew for each rental order line based on crew availability, skill and license requirements when integrated with Field Service module.
View Order Activity and Swap Items, S/N and Billing Rates	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).
Sell and Rent the Same Item	Allows for selling and renting the same item. Ability to sell items on rent to customers. Swap defective product on rent.
Create Projects and Production Work Orders	Create projects and production work orders from rental contract entry based on project templates, and defined production options and routing steps.
Invoice Missing and Damaged Items	Generate an invoice to bill for missing and damaged items. Provide a grace period before billing customers for missing and damaged
Rental Packages	Create rental packages grouping rental, sales (consumable) and crewing (services / labor). Ability to price by package or individually.
Process Sub-Rentals	Ability to enter sub-rental amount, vendor and non-stock item during rental contract entry. Generate RTV document for rental returns.
Rental Revenue Displays	View rental revenue generated for any date range by item, customer or item class.
Track information by Equipment	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