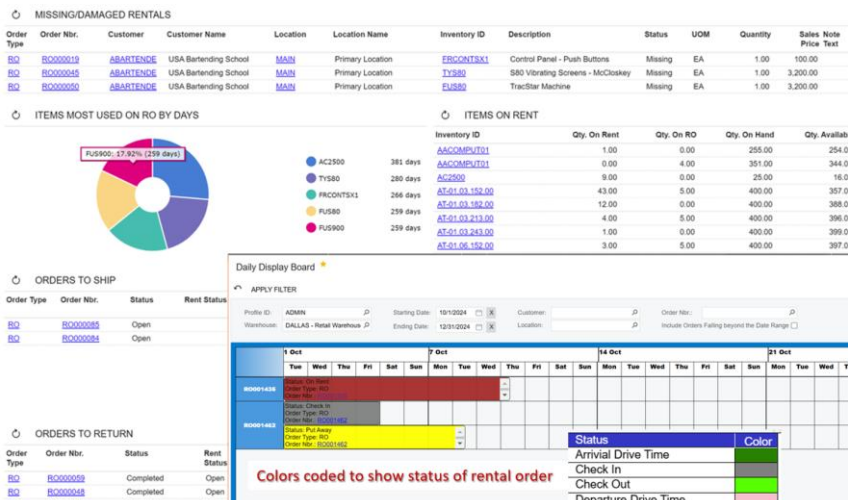# RENTAL ORDER PROCESSING

Streamlines your operations from generation of both quotes and rental contracts in Sales Orders, CRM, Customer Portal, Service Orders or Mobile App. Track time-based availability and multiple reservation of a S/N. Process rental shipments & returns using bar code scanners or RFID. Using optional features, setup for each equipment check in/out inspections and scheduled services, track equipment ROI (by tracking purchase cost, AP bills paid for the equipment, rental revenue and expenses for repairs and maintenance), schedule crew to operate machinery, and generate rental contracts by scanning equipment in the warehouse (showroom / rental yard).

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.
- **Hourly and Daily Dashboards.** View status of returns and shipments on dashboard with ability to view and adjust time by function - setup, put-away, stage, tear down, drive time, check in & check-out.
- **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 (Bar Code /RFID).** Track products staged/shipped by box and boxes loaded in each truck. Track time to stage and ship products by job.
- **CPQ Processing.** Streamlined configuring and pricing of jobs. Allocation of equipment and creation of quotes and rental contracts.

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.

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 Integration	Track purchase cost, expenses from AP and Service Orders and Revenue generated for each equipment (as part of AcuEquipROI Integration).
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.
Rental Check in/out & Scheduled Services	Ability to define needed inspections for check in/out and scheduled services when installed with AcuQC.
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 renal contracts and change rental rates on existing rentals (price increases).
Deposit & Damage Waiver Processing	Setup deposit and damage waiver requirements by customer and item.
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