



RESOLV EQUIPMENT RENTAL

USER MANUAL

Version 10.0

PRESENTED BY

VISTAVU SOLUTIONS



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SAP Business One Integration

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Resolv Equipment Rental is part of the Resolv Suite, which has been certified by SAP as conforming to SAP's standards for Business One add-on solutions.

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**RESOLV EQUIPMENT RENTAL DESKTOP
USER GUIDE**

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Setup

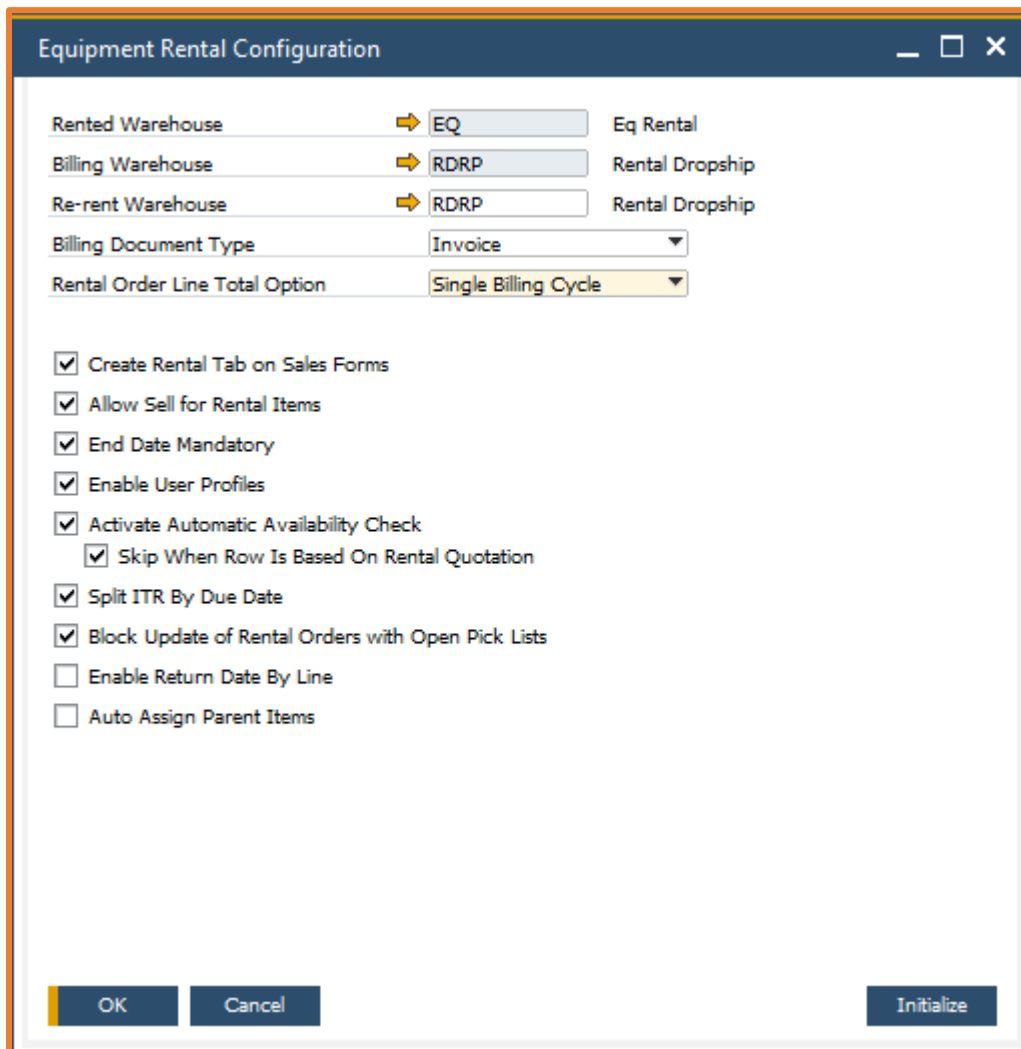
There is some setup involved before Equipment Rental can be used. The screens for configuration are located primarily under the *Administration > Resolv Setup > Resolv Equipment Rental* menu, however there are also some standard SAP screens that require setup.

Resolv Setups

In this section we will go over the various settings for Equipment Rental.

Equipment Rental Configuration

(Administration > Resolv Setup > Resolv Equipment Rental > ER Configuration)



Rented Warehouse	EQ	Eq Rental
Billing Warehouse	RDRP	Rental Dropship
Re-rent Warehouse	RDRP	Rental Dropship
Billing Document Type	Invoice	
Rental Order Line Total Option	Single Billing Cycle	

- Create Rental Tab on Sales Forms
- Allow Sell for Rental Items
- End Date Mandatory
- Enable User Profiles
- Activate Automatic Availability Check
 - Skip When Row Is Based On Rental Quotation
- Split ITR By Due Date
- Block Update of Rental Orders with Open Pick Lists
- Enable Return Date By Line
- Auto Assign Parent Items

Buttons: OK, Cancel, Initialize

Rented Warehouse – Specify a warehouse code to be used when items are rented and delivered to customers. This Warehouse will be set as a Regular warehouse (it cannot be a Drop-Ship warehouse). It is possible to enable Bin Locations for this warehouse.

Billing Warehouse – Specify a warehouse code to be used for rental invoicing purposes. This will be a Drop-Ship warehouse.

Re-Rent Warehouse – Specify a warehouse code in case you have the Re-Rent scenario: Renting items from a vendor to Re-Rent them to a customer. This must be set as Drop-Ship as well to manage Serial Numbers and Batches.

Billing Document Type – Specify which document will be created for Equipment Rental billing purposes: Delivery or AR Invoice.

Rental Order Line Total Option – Specify the total value of the rental document: Set to Zero, Single Billing Cycle or Expected Lifetime Value.

Create Rental Tab on Sales Forms – Check this if you want the system creates a tab in Sales Forms for Rental settings.

Allow Sell for Rental Items – Check this if you want to allow users to sell items set as Rental Items.

End Date Mandatory – Check this if you expect to know when your goods will come back from Rental.

Enable User Profiles – Used to define default Billing Cycles and Warehouses by Employee

Activate Automatic Availability Check - Check this to enable the availability check for Rental quantities.

Skip When Row Is Based On Rental Quotation – Enabled only when the option *Activate Automatic Availability Check* is checked. This option can be used to not trigger the Rental Availability Check when the order line is based on a Sales Quotation.

Split ITR By Due Date – Check this option if you want the Inventory Transfer split based on Due Dates of the rows.

Block Update or Rental Orders with Open Pick Lists – Check this option if you want to block the user to update a Rental Document when this has Open Pick Lists.

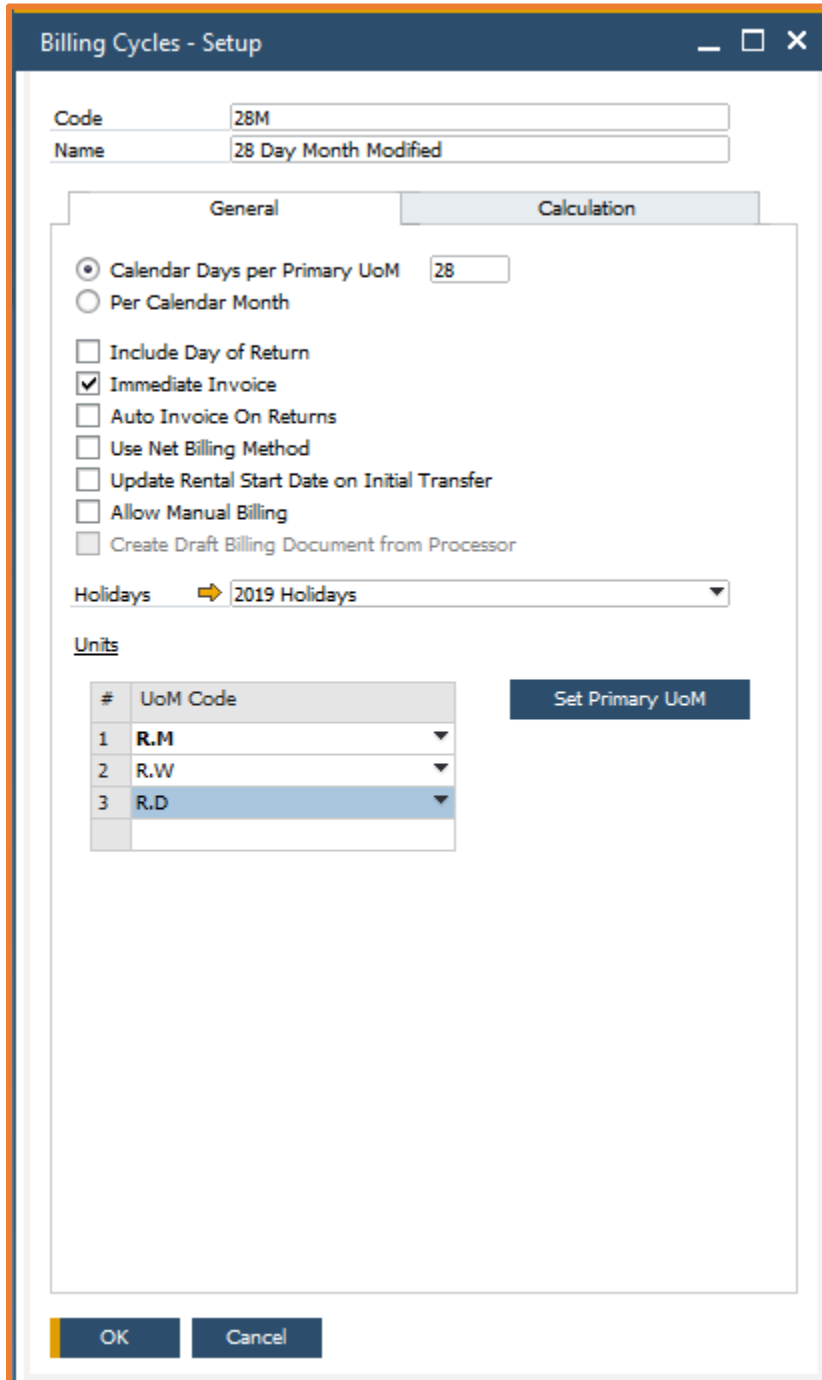
Enable Return Date By Line – Check this option if you want the return date by line.

Auto Assign Parent Items – Check this option if you want to rent no Inventory Items.

Initialize Button – To be used during Cut-over processes for Rental Sales Orders: This creates Inventory Transfer Requests for all open Rental Sales Orders (i.e., when Sales Orders are loaded via Data Transfer Workbench).

Billing Cycles – Setup

(Administration > Resolv Setup > Resolv Equipment Rental > ER Billing Cycles)



Billing Cycles - Setup

Code: 28M
Name: 28 Day Month Modified

Calculation

Calendar Days per Primary UoM: 28
 Per Calendar Month

Include Day of Return
 Immediate Invoice
 Auto Invoice On Returns
 Use Net Billing Method
 Update Rental Start Date on Initial Transfer
 Allow Manual Billing
 Create Draft Billing Document from Processor

Holidays: 2019 Holidays

Units

#	UoM Code
1	R.M
2	R.W
3	R.D

Set Primary UoM

OK Cancel

The Billing Cycle allows the setup of how the system will react for Rental billing.

Code - Enter a code or abbreviation for the Rental Billing Cycle (maximum 50 characters).

Name - Enter a name for the Rental Billing Cycle (maximum 100 characters).

Calendar Days per Primary UoM - Enter the number of Calendar days for this Billing Cycle.

Per Calendar Month – Choose this option to allow the system to consider the number of days in the month for the Billing Cycle instead of specifying a number of days.

Include Day of Return – Check this option if you want to include the Return day in the billing.

Immediate Invoice - Check this if you want to start invoicing at the beginning of the Billing Cycle (first day of rental). The subsequent Billing Documents will be created considering the invoicing process starts as soon as the Rental begins. (Example: If the Billing Cycle is set with *Calendar Days per Primary UoM* as 28, the First Billing Document will be created on day 1. The second Billing Document will be on day 29. The third Billing Document on day 57, and so on.) If this is unchecked, the first Billing Document would be created at the end of the Billing Cycle.

Auto Invoice On Returns - This option is to allow the system to create the Rental Billing Document automatically when the product is returned from the Rental Return screen

Use Net Billing Method – Check this option if you want the billing takes the exact quantities that went on rent and back during the billing cycle

Update Rental Start Date on Initial Transfer – Check this option if you want to update the rental Start Date when the Transfer is created.

Allow Manual Billing – Check this option if you want to bill manually the rental Order.

Create Draft Billing Document from Processor – Check this option if you want the processor creates a draft document instead the final document.

Holidays – Choose the Holidays from the list, the system will not bill these dates.

Units tab – A list of SAP Unit of Measures (UoMs) is displayed on this screen, since rental rates are set up by UoMs from Price Lists. One UoM will be assigned as the Billing Cycle Primary UoM, which is the one that will be used in the Billing Cycle Documents. In the example from the above screen shot, there are three UoMs configured as Rental rates in the Billing Cycle coded as M28: One for Monthly Rate (R.M), another one for Weekly Rate (R.W), and the last one for Daily Rate (R.D). The Monthly Rate is set up as the Billing Cycle Primary UoM.

Billing Cycles - Setup

Code: M28
 Name: Monthly 28 Days

General Calculation

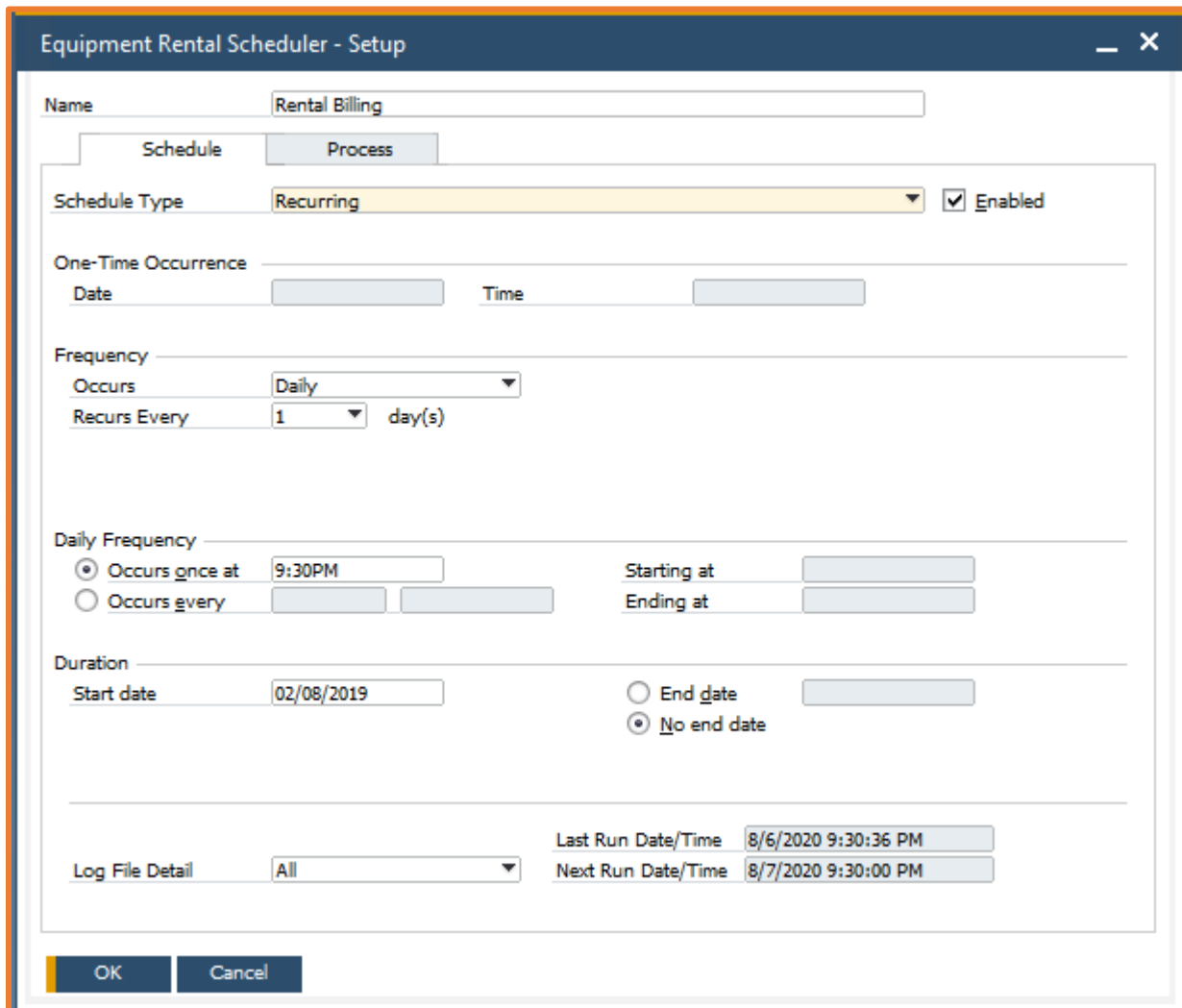
#	Day #	R.M	R.W	R.D
1	1			1
2	2			2
3	3			3
4	4			4
5	5			5
6	6			6
7	7		1	
8	8		1	1
9	9		1	2
10	10		1	3
11	11		1	4
12	12		1	5
13	13		2	6
14	14		2	
15	15		2	1
16	16		2	2
17	17		2	3
18	18		2	4
19	19		2	5
20	20		3	6
21	21		3	
22	22		3	1
23	23		3	2
24	24		3	3
25	25		3	4
26	26		3	5
27	27		3	6
28	28	1		

OK Cancel

Calculation tab – Allows designing how the system is going to calculate the Rental rates when the Rental Return Billing Document is posted in the middle of the Billing Cycle. Using the example from the above screen shot: In the case that the product is returned on day 15, the customer would be charged with 2 Rental Weekly rates and 1 Rental Daily rate.

Equipment Rental Scheduler – Setup

(Administration > Resolv Setup > Resolv Equipment Rental > ER Service Scheduler)



Utilizing the Equipment Rental Scheduler, along with the Resolv Processor (see the **Resolv 10.0 Installation and Setup Guide** to learn how to set the processor up), the system can generate Billing Cycle Documents automatically.

After giving your schedule a name, you will notice there are two tabs: Schedule and Process.

On the Schedule tab, choose the appropriate options for how often you would like the processor to run for Equipment Rental. This will dictate to the Resolv Processor when to execute. You should also choose what level of detail you want written out to the processor log. Your choices are All (which shows every bit of detail from the processor run; this is designed mostly for troubleshooting), Schedule and Transactions (which will show entries in the log each time the processor runs whether

Item Master Data

Item No. Manual A00006 Inventory Item
 Description Rainbow 1200 Laser Series Sales Item
 Foreign Name Purchase Item
 Item Type Items Is Quality Check Required ?
 Item Group Rainbow Printers
 UoM Group Each
 Price List Base Price
 Bar Code Each
 Unit Price Primary Curr 400.00 \$ Each
 Pricing Unit Each

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments Mobile Scan

Tax Liable
 Do Not Apply Discount Groups
 Manufacturer Rainbow
 Additional Identifier
 Shipping Type Fedex EM
Service Attributes
 Warranty Template Golden Warranty
Serial and Batch Numbers
 Manage Item by Serial Numbers
 Management Method On Every Transaction

General

Hide from Order To Cash No
 Rental Item Yes
 Require Internal Serial Scan Optional
 Require Manu Serial Scan Optional
 Require Lot Number Scan Optional
 Require Details Scan Optional
 WMS Batch 1 Label
 WMS Batch 2 Label
 WMS Detail Label
 Batch Attribute #1 Optional
 Batch Attribute #2 Optional
 Require Details Scan Optional
 Batch Expiration Date Optional
 Batch Manufacturing Date Optional
 Batch Admission Date Optional
 Transacted Upon No
 Relevant TO BC No
 Duplicate Global Item
 Distribution Code
 SetGlobalItem No
 Quality Required

Price Lists

(Inventory > Price Lists > Price Lists)

You can set prices in SAP for the Rental UoM Codes.

Regular Sales Price - UoM Prices						
Item: A00006						
#	UoM Code	UoM Name	Base Price	Reduce By %	Price	Auto
1	Each	Each	600.00 \$		600.00 \$	<input type="checkbox"/>
2	R.D	Rental Daily	600.000000 \$	96.667	20.00 \$	<input checked="" type="checkbox"/>
3	R.M	Rental Monthly	600.000000 \$	33.333	400.00 \$	<input checked="" type="checkbox"/>
4	R.W	Rental Weekly	600.000000 \$	81.667	110.00 \$	<input checked="" type="checkbox"/>
5				0.000		<input checked="" type="checkbox"/>

Special Prices for Business Partners

(Inventory > Price Lists > Special Prices > Special Prices for Business Partners)

Special Prices for Business Partners can also be used for Rental UoMs.

Period Discounts						
#	Valid From	Valid To	Price List	Discount %	Price after Disc...	A...
1	08/06/2020		Distributor Sales Pr	0.000	500.00 \$	<input checked="" type="checkbox"/>
2			Distributor Sales Pr	0.000	500.00 \$	<input checked="" type="checkbox"/>

Employee Master Data

(Human Resources > Employee Master Data > Special Prices > Special Prices for Business Partners)

User Code Home Phone

Sales Employee Fax

Cost Center E-Mail

Linked Vendor

Address Membership Administration **Personal** Finance Remarks Attachments Resolv Rental

Default Warehouse

Default Warehouse Override

#	Billing Cycle
1	14 days
2	1 Week Immediate
3	28 Days with Weekly Billing
4	28 Day Month Modified
5	28 Days Manual Draft
6	Monthly 28 Days
7	28 Days Manual

Delete

Set As Default

OK Cancel

Rental tab

If the option Enable User Profiles from Equipment Rental Configuration is checked in the Equipment Rental Configuration, a new tab called *Rental* appears in the Employee Master Data screen. There are some Rental fields here. A User Code must be linked to an Employee Master Data record.

Default Warehouse – This will be the default warehouse for the user when adding new Rental documents.

Default Warehouse Overwrite – When this box is checked, the user will be able to choose warehouses other than their default one. However, if this box is not checked, then the user will only be able create Rental documents for their default warehouse.

Billing Cycle – Allows the setup of a list of Billing Cycles that this user can choose when adding new Rental documents. You can set up a Billing Cycle to be defaulted for the user.

Procedures

The following sections describe the procedures used in Resolv Equipment Rental.

Sales Quotation

(Sales – A/R > Sales Quotation)

There are several User-Defined-Fields (UDFs) added in the Sales Quotation screen. Some standard SAP fields have a different behavior when working with the Rental Module.

Equipment Rental fields

Accounting tab

Rental Document – This determines if this is a Rental Document.

Rental Billing Cycle - The default Rental Billing Cycle. The value from this field will be replicated on the document lines

Header

The screenshot shows the 'Sales Quotation' window with the following fields:

- Customer: C26000
- Name: River Inc
- Contact Person: Lewis Beerman
- Customer Ref. No.:
- BP Currency: \$
- No.: Hardware 1230
- Status: Open
- Posting Date: 07/07/2020
- Valid Until: 07/07/2020
- Document Date: 07/07/2020
- Rental Start Date: 07/14/2020
- Rental End Date:

Below the header are tabs for Contents, Logistics, Accounting, Electronic Documents, and Attachments. A table with columns for Item No., Quantity, Unit Price, Disc..., Tax C..., Total (LC), Whse, Gross Profit B..., UoM Code, and CO... is visible.

Rental Start Date - The default Rental Start Date. The date from this field will be replicated on the document lines. When filling out this field, the document is automatically set as a Rental Document (Field Rental Document set as 'Yes').

Rental End Date - The default Rental End Date. The date from this field will be replicated on the document lines.

Logistics tab

The screenshot shows the 'Sales Quotation' window with the 'Logistics' tab selected. The fields are:

- Customer: C26000
- Name: River Inc
- Contact Person: Lewis Beerman
- Customer Ref. No.:
- BP Currency: \$
- No.: Hardware 1230
- Status: Open
- Posting Date: 07/07/2020
- Valid Until: 07/07/2020
- Document Date: 07/07/2020
- Rental Start Date: 07/14/2020
- Rental End Date:
- Language: English
- Procure Non Drop-Ship Items
- Procure Drop-Ship Items
- BP Channel Name:
- BP Channel Contact:
- Ship To: United Rd, NY 33521, USA
- Bill To: United Rd, NY 33521, USA
- Shipping Type: UPS Ground
- Rent From Warehouse: 01
- Sales Employee: Sales Manager
- Owner: Cuadra, Christine
- Rental Discount: %
- Total Before Discount:
- Discount: %
- Freight:
- Rounding: 0.00 \$
- Tax:
- Total: 0.00 \$

Rent From Warehouse - The default Rent From Warehouse. The value from this field will be replicated on the document lines.

Rental tab

If you checked the “Create Rental Tab on Sales Forms” box in the Equipment Rental Configuration, the system will show the Rental fields all together in a Rental tab.

Sales Quotation

Customer	C26000	No.	Hardware	1230
Name	River Inc	Status	Open	
Contact Person	Lewis Beerman	Posting Date	07/07/2020	
Customer Ref. No.		Valid Until	07/07/2020	
Local Currency		Document Date	07/07/2020	

Contents | Logistics | Accounting | **Rental** | Electronic Documents | Attachments

Rental Document

Rental Start Date: 07/14/2020

Rental End Date:

Rent From Warehouse: 05

Rental Billing Cycle: Monthly 28 Days

Rental Discount: %

Sales Employee	Sales Manager	Total Before Discount	530.00
Owner	Cuadra, Christine	Discount	%
		Freight	
		<input type="checkbox"/> Rounding	
		Tax	43.73
		Total	573.73

Content tab

The screenshot shows the SAP Sales Quotation interface. At the top, there are fields for Customer (C26000), Name (River Inc), Contact Person (Lewis Beerman), Customer Ref. No., and BP Currency (\$). On the right, there are fields for No. (Hardware 1230), Status (Open), Posting Date (07/07/2020), Valid Until (07/07/2020), Document Date (07/07/2020), Rental Start Date (07/14/2020), and Rental End Date.

The main table is titled 'Contents' and has tabs for Logistics, Accounting, Electronic Documents, and Attachments. The table columns are: #, Item No., Rental Type, Rental Quantity, Rental Start Date, Rental End Date, Rent from W..., Rental Billing Cycle, Re-rent Unit Cost, Unit Price, and Disc... (Discount). The table contains three rows:

#	Item No.	Rental Type	Rental Quantity	Rental Start Date	Rental End Date	Rent from W...	Rental Billing Cycle	Re-rent Unit Cost	Unit Price	Disc...
1	A00006	Rent	1	07/14/2020		01	Monthly 28 Days		400.00 \$	100.000
2	A00001	Re-rent	1	07/21/2020		01	Monthly 28 Days	50.00	130.00 \$	100.000
3		Sell						0.00		0.000

At the bottom, there are fields for Sales Employee (Sales Manager) and Owner (Cuadra, Christine). On the right, there is a summary section with the following values:

Total Before Discount	530.00 \$
Discount	%
Freight	
<input type="checkbox"/> Rounding	0.00 \$
Tax	43.73 \$
Total	573.73 \$

Rent Type - There are three possible values for this field. Rent, Re-Rent, or Sell. For items pre-configured as Rental in Rental documents, this field is automatically set as Rent. The user has the option to manually select Re-Rent. If Sales is allowed for Rental Items, the user can change this option to Sell. For non-Rental documents, this field is set as Sell.

Rental Quantity - The Rental Quantity is set in this User-Defined-Field – Not in the standard SAP field.

Rental Start Date - The default Rental Start Date. The date from this field will be replicated on the document lines. When filling out this field, the document is automatically set as a Rental Document (Field Rental Document set as 'Yes').

Rental End Date - The default Rental End Date. The date from this field will be replicated on the document lines.

Rent From Warehouse - The warehouse from where the Rental Quantity will be issued.

Rental Billing Cycle - The Billing Cycle option is by line and defines the billing method for the rental.

Re-Rent Unit Cost – The price that will be set in the Re-Rent Purchase Order.

Behavior of SAP fields

Standard SAP line fields have a different behavior for Rental Lines. Resolv Equipment Rental automatically sets values in the following fields:

Quantity - Set as 999,999. Billing Documents (Deliveries or AR Invoices) will be created based on the Sales Order. By following standard SAP Business One behavior, every time a Delivery or AR Invoice is created, the quantity will be deducted from the Sales Order line quantity.

Discount % - Set as 100.

Price – Set with the price from the Primary UoM as per Billing Cycle configuration.

Total - Set as 0 due to the Discount %.

Taxes – System will calculate taxes based on Billing Cycles, the system will take the total of the billing cycle by Tax % from the Sales Order and it will display the amount in the Rental Items Details

#	Item No.	Description	From Whse	Rental Qty	Re-Rent Cost	Start Date	End Date	Billing Cycle	Open Qty	Rented Qty	Exch Qty	Returned Qty	Total
1	A00001	J.B. Officeprint 1420	01	3,000	0.00	15/03/2021	15/03/2022	Monthly 28 Days	3,000	0,000	0,000	0,000	390.00

Billing Cycle	
Total Before Discount	390.00
Discount	0.00
Tax	32.17
Total	422.17

Whse – For lines with the Rent Type set to Rent: Set with the Billing Warehouse from Equipment Rental Configuration.

For lines with the Rent Type set to Re-Rent: Set with the Re-Rent Warehouse from Equipment Rental Configuration.

Gross Profit Base Price – Set as 0.

UoM Code – Set with the Primary UoM Code from Billing Cycle.

Availability Check

Item Availability Check for A00006

Item Number → A00006

Description Rainbow 1200 Laser Series

Warehouse → 01

Rental Quantity 2,000

Rental Start Date 07/14/2020

Available Quantity -184,000 Each

Select Action:

- Continue
- Change to Available Quantity
- Display Quantities in Other Warehouses
- Delete Row

OK

If Activate Automatic Availability Check is checked on the Equipment Rental Configuration, an Item Availability Check screen appears when moving out of the Rental Quantity field. This screen works the same way as the SAP Availability Check, but it considers Rental Quantities instead

Rental Prices

Double clicking on the Unit Price field opens a screen to edit Rental Prices per UoM Codes

Rental Prices

Item: A00006

UoM Code	Unit Price
Monthly	400.00
Daily	110.00
R.D	20.00

Update Cancel

Sales Order

(Sales – A/R > Sales Order)

After the Sales Quotation is added, the next step is to copy the document to the Sales Order. It is not mandatory to use Rental Sales Quotations so it is possible to start the process right in the Sales Order screen if preferred. Most of the Rental functionalities and behaviors are the same as in the Sales Quotations. There are a few exceptions:

Rental Item Details – Sales Orders

#	Item No.	Description	From Whse	Rental Qty	Re-Rent Cost	Start Date	End Date	Billing Cycle	Open Qty	Rented Qty	Exch Qty	Returned Qty	Total
1	A00006	Rainbow 1200 Laser Series	01	1.000	0.00	07/14/2020		Monthly 28 Days	1.000	0.000	0.000	0.000	400.00
2	A00001	J.B. Officeprint 1420	01	1.000	50.00	07/21/2020		Monthly 28 Days	0.000	0.000	0.000	0.000	130.00

Billing Cycle	
Total Before Discount	530.00
Discount	0.00
Tax	43.72
Total	573.72

The Rental Item Details screen has different Quantity columns.

- a. Open Qty: Items still need to be picked and shipped to customer
 - i. Lines with the Rent Type set to Rent: Inventory Transfer Request has been created
 - ii. Lines with the Rent Type set to Re-Rent: Purchase Order has been created
- b. Rented Qty: Items are shipped to customer
 - i. Lines with the Rent Type set to Rent: Inventory Transfer has been created
 - ii. Lines with the Rent Type set to Re-Rent: Delivery document has been created
- c. Exchange Qty: Serial/Batch numbers has been exchange and are pending for a new serial/batch to replace them
- d. Returned Qty: Items have been returned but the final bill hasn't yet been created

There is a Rental Order form, it needs to be setup in Reports and Layout Manager under Sales Orders > Order (Items).

It is possible to create a Service Contract from a button in the Rental Items Details screen. The user still has the chance to review and update the data before adding the Service Contract. The Rental Order No. field is populated along with some other Business Partner and Item fields.

Document Creation from Sales Order

For lines where the Rental Type is Rent: Once the Sales Order is added, the system considers that the Items are ready to be picked and prepared to be shipped to the customer. Inventory Transfer Requests are always created from Rent Sales Order lines for all rental quantities, regardless if the quantity is reserved or not. Updates on Item Codes and Rental Quantities from Sales Orders are reflected on Inventory Transfer Requests before the Inventory Transfer is created.

For lines where the Rental Type is Re-Rent: The Procurement Confirmation Wizard is triggered for Re-Rent items and quantities. As a result, a Purchase Order is created.

For un-approved Sales Orders, the system will create an Inventory Transfer Request, but the system will not allow the creation of a Pick List or an Inventory Transfer from this document.

Rent Process

The following steps will describe the procedure for the Rent Process: Items and quantities that will be rented belong to the company.

Inventory Transfer Request

(Inventory > Inventory Transactions > Inventory Transfer Request)

#	Item No.	Item Description	Fro...	To Ware...	Quantity	UoM Code	UoM Name	Rental Start Date	Rental End Date	Rental Unit Pri...	Re...
1	A00001	J.B. Officeprint 1420	01	09	5	Each	Each	27/01/2021	27/01/2026	0.00	
2	A00006	Rainbow 1200 Laser Set	01	09	3	Each	Each	27/01/2021	27/01/2026	0.00	
3			01	09							

As explained in a previous topic, Inventory Transfer Requests are created for Rental Quantities from Sales Orders. The document is populated with:

- 1) Business Partner Code, Name, Contact Person, and Ship To from Sales Order
- 2) Item Codes from Sales Order
- 3) From Warehouse: This is the Rent From Warehouse from the Sales Order lines
- 4) To Warehouse: This is the Rented Warehouse from Equipment Rental Configuration
- 5) Quantity: This is the same quantity as the Rental Quantity from the Sales Order lines
- 6) Rental Start and End Dates: These are the same dates as the Rental Dates from the Sales Order

Inventory Transfer to Rented Warehouse

(Inventory > Inventory Transactions > Inventory Transfer)

Once the Inventory Transfer based on the Inventory Transfer Request is added (Through the Copy To/Copy From button, Pick and Pack Manager, or DI API), the system considers that the Item is rented.

Equipment Card

(Service > Service Contract)

Equipment Card

Equipment Type: Sales Purchasing

Mfr Serial No. Status: Active

Serial Number: 85483 Previous SN:

Item No. → A00006 New SN:

Item Description: Rainbow 1200 Laser Series

Business Partner Code → C20000 Technician:

Business Partner Name: Maxi-Teq Territory:

Contact Person → Max Teq

Telephone No.: 555-0137

Address | Service Calls | Service Contracts | Sales Data | Transactions | Attachments

Street: 4417 Stonebridge Rd

Street No.:

Building/Floor/Room:

Zip Code: 18067

Block: Suite 500

City: Northampton

State: Pennsylvania

County: Northampton County

Country: USA

Location:

OK Cancel

An Equipment Card with status Active is automatically created in the background for Rented Quantities. The Business Partner from the Rental Sales Order is assigned to the Equipment Card.

For serialized items, the Serial Number field is populated with the Serial Number from the Inventory Transfer. In case the item is not serialized, the system fills in the Serial Number as “Sales Order Number-Line Number”.

Billing Cycle Documents

(Sales – A/R > Delivery)

(Sales – A/R > A/R Invoice)

A/R Invoice

Customer: C20000
 Name: Maxi-Teq
 Contact Person: Max Teq
 Customer Ref. No.:
 Local Currency:

No. Primary: 3090
 Status: Open
 Posting Date: 29/10/2019
 Due Date: 29/10/2019
 Document Date: 29/10/2019

#	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	Bin L...	UoM Code	COGS Branch	CO...	Cou...
1	A00006	1	400.00 \$	0.000	PA	400.00 \$		R.M			
2	A00001	1	131.00 \$	0.000	PA	131.00 \$		R.M			

Sales Employee: Sales Manager
 Owner: Butler, Jason

Payment Order Run:
 Remarks: Based On Sales Orders 1680.

Total Before Discount: 531.00 \$
 Discount: %
 Total Down Payment:
 Freight:
 Rounding:
 Tax: 31.86 \$
 Total: 562.86 \$
 Applied Amount:
 Balance Due: 562.86 \$

OK Cancel Copy From Copy To

Once Items are rented, Billing Cycle Documents will be automatically created according to the Billing Cycle configuration. The Billing Cycle document can be either a Delivery or an AR Invoice document, according to the ER Configuration.

If Immediate Invoice is turned on for the Billing Cycle, the first Billing Cycle Document will be automatically created for the Rented Items and Quantities as soon as the Inventory Transfer is added, and the Equipment Rental processor is run. (For instance, if a Rental Start Date for a Rental Sales Order line is set as 02/02/2019 and the Calendar Days per Primary UoM from the Billing Cycle setup is set as 30 days, the first Billing Cycle document would be automatically created on 02/02/2019, as soon as the Inventory Transfer is added. The next Billing Cycle document would be created on 03/04/2019, and so on, until the product is returned.) Resolv Equipment Rental will always use the Unit Price from the Sales Order for the creation of Billing Cycle Documents.

In the case that Immediate Invoice is turned off for the Billing Cycle, the first Billing Cycle Document will be automatically created for the Rented Items and Quantities at the end of the Billing Cycle. (For instance, if a Rental Start Date for a Rental Sales Order line is set as 02/02/2019 and the Calendar Days per Primary UoM from Billing Cycle setup is set as 30 days, the first Billing Cycle document would be automatically created on 03/04/2019. The next Billing Cycle document would be created on 04/03/2019, and so on, until the product is returned.)

Different from Sales Orders, Billing Cycle Document lines have a Line Total. The Quantity field is set as 1 for all lines. The Unit Price for each line is the Unit Price from the Sales Order multiplied by the Rented Quantity. Also, by following the standard SAP Business One behavior, the quantity from the Sales Order line (originally set as 999,999) is deducted.

The Billing Warehouse (Drop-Ship) set on the Sales Order lines is copied to the Billing Cycle Document: Billing Cycle documents do not affect Inventory GL Accounts and Quantities.

List of Rented Items for Customer C20000

#	Sel	Rental Doc	Customer Ref. No.	Doc Row	Item No.	Description	Rented Qty	Return Qty	Warehouse
	<input type="checkbox"/>	1619		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1620		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1622		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	05
	<input type="checkbox"/>	1627		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1647		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1647		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1648		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1648		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1649		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1649		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1650		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1650		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1651		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1651		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1652		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1652		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1654		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1654		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1655		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1655		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1668		1	A00001_batchnum	J.B. Officeprint 1420	1.00	1.00	05
	<input type="checkbox"/>	1672		1	A00001_batchnum	J.B. Officeprint 1420	5.00	5.00	05
	<input type="checkbox"/>	1672		2	A00006	Rainbow 1200 Laser Series	2.00	2.00	05
	<input type="checkbox"/>	1679		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1679		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1680		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input checked="" type="checkbox"/>	1680		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1681		1	A00006	Rainbow 1200 Laser Series	1.00	1.00	01
	<input type="checkbox"/>	1681		2	A00001	J.B. Officeprint 1420	1.00	1.00	01
	<input type="checkbox"/>	1723		1	A00001	J.B. Officeprint 1420	3.00	3.00	01
	<input type="checkbox"/>	1723		2	A00006	Rainbow 1200 Laser Series	1.00	1.00	01

Choose Cancel

After selecting the Customer, a button called Copy From is available. By clicking on this button, a list of Rental Sales Orders is displayed. Only Rented Items and Quantities are displayed. The system allows the user to change the Return Qty in case of a partial return. The Sales Order Line Rent From Warehouse is pre-populated, but it is possible to set a different Warehouse for the return if desired.

Rental Return Request
— □ ×

Business Partner → C20000

Name Maxi-Teq

Contact Person → Max Teq

Ship To Ship to

4417 Stonebridge Rd
 Suite 500
 Northampton PA 18067
 USA

No. Primary 978

Status Open

Posting Date 19/02/2021

Due Date 19/02/2021

Document Date 19/02/2021

Referenced Document ...

Price List Regular Sales Price

From Warehouse → 09

To Warehouse → 01

Contents		Attachments									
#	Item No.	Item Description	Fro...	To Ware...	Quantity	UoM Code	UoM Name	Rental Start Date	Rental End Date	Rental Unit Pri...	Re...
1	→ A00006	Rainbow 1200 Laser Set	→ 09	→ 01	1	Each	Each			0.00	
2	→ A00001	J.B. Officeprint 1420	→ 09	→ 01	1	Each	Each			0.00	
3										0.00	

Sales Employee Sales Manager

Journal Remarks Inventory Transfer Request - C20000

Pick and Pack Remarks

Remarks

Add Cancel

Copy From Copy To

Once items are added on the previous screen, the system goes back to the Rental Return Request. The From Warehouse is automatically populated with the Rented Warehouse.

Inventory Transfer from Rented Warehouse

(Inventory > Inventory Transactions > Inventory Transfer)

Once the Inventory Transfer based on the Rental Return Request (Inventory Transfer Request) is added through the Copy To/Copy From buttons, the Pick and Pack Manager, or the DI API, the system considers that the Item is returned. For Serialized items, the related Equipment Card status will be automatically changed to Terminated. For non-serialized items, the related Equipment Card status (which will be set to "Sales Order Number-Line Number") will remain Active unless the Rented Quantity reaches zero, in which case it will also be marked as Terminated. There is a Rental Return form for this document, the form is setup in Report and Layout Manager under Inventory Transfers.

Rental Return

(Resolv > Resolv Equipment Rental > Rental Return)

#	Sel	Rental Doc	Customer Ref. No.	Customer	Name	Type	Return Doc	Return Date	Return Qty	Return Whse	Item	Description	Last Bill
7	<input type="checkbox"/>	1230		C20000	Maxi-Teq	Rent	42	30/11/2018	1.000	01	A00001_serialized	J.B. Officeprint 1420	
8	<input type="checkbox"/>	1230		C20000	Maxi-Teq	Rent	72	11/12/2018	1.000	01	A00001_serialized	J.B. Officeprint 1420	
9	<input type="checkbox"/>	1246		C20000	Maxi-Teq	Rent	72	11/12/2018	2.000	01	A00001_serialized	J.B. Officeprint 1420	
10	<input type="checkbox"/>	1256		C20000	Maxi-Teq	Rent	74	11/12/2018	3.000	01	A00001_serialized	J.B. Officeprint 1420	
11	<input type="checkbox"/>	1261		C20000	Maxi-Teq	Rent	76	12/12/2018	1.000	01	A00001_serialized	J.B. Officeprint 1420	
12	<input type="checkbox"/>	1262		C20000	Maxi-Teq	Rent	78	12/12/2018	2.000	01	A00001_serialized	J.B. Officeprint 1420	
13	<input type="checkbox"/>	1290		C20000	Maxi-Teq	Rent	115	19/12/2018	1.000	01	A00001	J.B. Officeprint 1420	1085
14	<input type="checkbox"/>	1291		C20000	Maxi-Teq	Sell	1757	30/07/2019	1.000	09	A00002	J.B. Officeprint 1111	2118
15	<input type="checkbox"/>	1303		C20000	Maxi-Teq	Rent	129	21/12/2018	1.000	01	A00001_serialized	J.B. Officeprint 1420	
16	<input type="checkbox"/>	1304		C20000	Maxi-Teq	Rent	131	21/12/2018	1.000	01	A00001_serialized	J.B. Officeprint 1420	
17	<input type="checkbox"/>	1306		C20000	Maxi-Teq	Rent	135	21/12/2018	1.000	01	A00001	J.B. Officeprint 1420	1096
18	<input type="checkbox"/>	1306		C20000	Maxi-Teq	Rent	135	21/12/2018	1.000	01	A00006	Rainbow 1200 Laser Series	1096
19	<input type="checkbox"/>	1307		C20000	Maxi-Teq	Rent	137	21/12/2018	1.000	01	A00001	J.B. Officeprint 1420	
20	<input type="checkbox"/>	1307		C20000	Maxi-Teq	Rent	137	21/12/2018	1.000	01	A00006	Rainbow 1200 Laser Series	
21	<input type="checkbox"/>	1308		C20000	Maxi-Teq	Rent	139	21/12/2018	1.000	01	A00001	J.B. Officeprint 1420	
22	<input type="checkbox"/>	1308		C20000	Maxi-Teq	Rent	139	21/12/2018	1.000	01	A00006	Rainbow 1200 Laser Series	
23	<input type="checkbox"/>	1311		C20000	Maxi-Teq	Rent	142	21/12/2018	1.000	01	A00001	J.B. Officeprint 1420	
24	<input type="checkbox"/>	1311		C20000	Maxi-Teq	Rent	142	21/12/2018	1.000	01	A00006	Rainbow 1200 Laser Series	
25	<input type="checkbox"/>	1324		C40000	Earthshaker Corporation	Rent	150	17/01/2019	1.000	01	A00006	Rainbow 1200 Laser Series	
26	<input type="checkbox"/>	1325		C20000	Maxi-Teq	Rent	152	22/01/2019	4.000	01	A00001	J.B. Officeprint 1420	
27	<input type="checkbox"/>	1328		C20000	Maxi-Teq	Rent	156	25/01/2019	1.000	01	A00001	J.B. Officeprint 1420	1111
28	<input type="checkbox"/>	1359		C20000	Maxi-Teq	Re-rent	31	13/02/2019	1.000	07	A00001	J.B. Officeprint 1420	1140
29	<input type="checkbox"/>	1495		C20000	Maxi-Teq	Rent	299	24/05/2019	2.000	01	A00001	J.B. Officeprint 1420	1916
30	<input type="checkbox"/>	1502		C20000	Maxi-Teq	Rent	309	31/05/2019	1.000	01	A00001_serialized	J.B. Officeprint 1420	1941
31	<input type="checkbox"/>	1525		C20000	Maxi-Teq	Rent	344	14/06/2019	4.000	01	A00001	J.B. Officeprint 1420	2011
32	<input type="checkbox"/>	1531		C20000	Maxi-Teq	Rent	342	14/06/2019	1.000	01	A00001_serialized	J.B. Officeprint 1420	
33	<input type="checkbox"/>	1553	tete	C20000	Maxi-Teq	Rent	362	05/07/2019	1.000	01	A00006	Rainbow 1200 Laser Series	
34	<input type="checkbox"/>	1557		C20000	Maxi-Teq	Sell	1756	03/07/2019	1.000	09	A00001	J.B. Officeprint 1420	
35	<input type="checkbox"/>	1602		C20000	Maxi-Teq	Rent	399	26/08/2019	2.000	01	A00006	Rainbow 1200 Laser Series	
36	<input type="checkbox"/>	1671		C23900	Parameter Technology	Rent	458	02/03/2020	1.000	01	A00006	Rainbow 1200 Laser Series	
37	<input type="checkbox"/>	1674		C25000	Star Company	Rent	470	31/03/2020	2.000	05	A00006	Rainbow 1200 Laser Series	
38	<input checked="" type="checkbox"/>	1680		C20000	Maxi-Teq	Rent	530	19/02/2021	1.000	01	A00006	Rainbow 1200 Laser Series	3090
39	<input checked="" type="checkbox"/>	1680		C20000	Maxi-Teq	Rent	530	19/02/2021	1.000	01	A00001	J.B. Officeprint 1420	3090
40	<input type="checkbox"/>	1697		ABC3	ABC3	Rent	505	27/04/2020	1.000	01	A00001	J.B. Officeprint 1420	
41	<input type="checkbox"/>	1703		C20000	Maxi-Teq	Rent	517	09/06/2020	1.000	01	Dumper	Dumper	2049
42	<input type="checkbox"/>	1703		C20000	Maxi-Teq	Rent	517	09/06/2020	1.000	01	MiniExc	Mini Excavadora	2049
43	<input type="checkbox"/>	1703		C20000	Maxi-Teq	Rent	517	09/06/2020	1.000	01	HECM2800	Grupos Electrogenos Portatiles	2049
44	<input type="checkbox"/>	1708		ABC2	ABC2	Rent	522	20/10/2020	1.000	01	Rental NDUBE	Rental NDUBE	

This screen creates a Rental Return Billing Document. This document can be an additional charge or a credit which relates to the dollar amount from the last day a Delivery/AR Invoice was issued and the day that the product was returned.

The filters on the document header are optional.

On the line level, documents can be selected in batch by double clicking on the Sel field. The Return Date is an open field, but it is pre-populated with the date that the Inventory Transfer from the Rented Warehouse was posted.

On the footer, the button Find is used to display records based on the header filters. The button Save allows the Return Date to be saved: When accessing the Rental Return screen again or pressing Find, the saved date will be kept.

Rental Return Billing Document

(Sales – A/R > A/R Invoice)

(Sales – A/R > Delivery)

(Sales – A/R > A/R Credit Memo)

(Sales – A/R > Return)

A/R Invoice

Customer: C20000
 Name: Maxi-Teq
 Contact Person: Max Teq
 Customer Ref. No.:
 BP Currency: \$

No. Primary: 3097
 Status: Open
 Posting Date: 19/02/2021
 Due Date: 19/02/2021
 Document Date: 19/02/2021

Contents | Logistics | Accounting | Attachments

Item/Service Type: Item

#	Type	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	Bin L...	UoM Code	COGS Branch
1		A00006	1	400.00 \$	0.000	PA	400.00 \$		R,M	
2	T	Unit Price calculated as follows: Rental Quantity of 1 bills for 1 R.M. @ 400.00								
3		A00001	1	131.00 \$	0.000	PA	131.00 \$	1	R,M	
4	T	Unit Price calculated as follows: Rental Quantity of 1 bills for 1 R.M. @ 131.00								
5					0.000					

Sales Employee: Sales Manager
 Owner: Cuadra, Christine

Total Before Discount: 531.00 \$
 Discount: %
 Total Down Payment:
 Freight:
 Rounding: 0.00 \$
 Tax: 31.86 \$
 Total: 562.86 \$

Payment Order Run

When selecting the lines and pressing the Process button, the system will create a Delivery/AR Invoice or Return/AR Credit Memo (depending on the Billing Document Type from ER Configuration).

To calculate the Unit Price from the Rental Return Billing Document lines, the system looks to the Calculation tab of the Billing Cycle for each Sales Order line (as explained in the above topic Billing Cycles – Setup). A Text Type line with an explanation of how the Unit Price is calculated is added for each Sales Order line.

The most common scenario is that a Delivery/AR Invoice will be created for Sales Orders lines with a Billing Cycle not configured to generate an Immediate Invoice. Usually, the system would create a Return/AR Credit Memo for Sales Orders lines with an Immediate Invoice Billing Cycle. However, there are some instances where the opposite could happen. The system will always compare the dollar amount Invoiced with the dollar amount calculated (as per the calculation tab from Billing Cycle) on the day of the Return to determine which document will be created.

Re-Rent Process

The following steps will describe the procedure for the Re-Rent: When items need to be rented from a vendor so that they can be Re-Rented to a customer.

Purchase Order

(Purchasing – A/P > Purchase Order)

Purchase Order

Vendor: V10000
 Name: Acme Associates
 Contact Person: Sarah Kierl
 Vendor Ref. No.:
 Local Currency:

No. Primary: 1297
 Status: Open
 Posting Date: 28/01/2021
 Delivery Date: 28/01/2021
 Document Date: 28/01/2021

#	Item No.	Item Descripti...	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	UoM Code	Country of Origin	Summary Type	Blan...	Standard It...	Co...
1	NSV74900	Re-Rent item	5		0.000	NY		R,M		No Summary			
2	NSV74900	Re-Rent item	999,999		0.000	NY		R,M					
3					0.000								

Buyer: James Chan
 Owner: Cuadra, Christine

Remarks: Based On Sales Orders 1725.

Total Before Discount:
 Discount: %
 Freight:
 Rounding:
 Tax:
 Total Payment Due: 0.00 \$

Buttons: OK, Cancel, Copy From, Copy To

A Purchase Order document will be created from the Procurement Confirmation Wizard for Sales Order lines with a Re-Rent Rental Type. The Procurement Confirmation Wizard will be triggered as soon as the Sales Order is added.

For each Sales Order line, two lines will be included in the Purchase Order for the same item.

- 1) The first line will be set with the original Rental Quantity from the Sales Order, Unit Price 0. The Re-Rent warehouse (from ER Configuration) will be automatically set. Inventory Receiving will be posted against this line.
- 2) For Invoicing purposes, the second line will be set with the quantity 999,999. The Billing Warehouse (from ER Configuration) will be automatically set.

Delivery

(Sales – A/R > Delivery)

As soon as the Goods Receipt PO is posted, a standalone Delivery document is automatically created by the system. The Re-Rent warehouse is assigned to the document. This Delivery is created for the original Rental Sales Order customer, with a Price set to 0 to reflect that the product has been delivered to the customer. The system interprets that the item is Rented.

For better tracking, the system links the Delivery document to the Goods Receipt PO via the SAP Business One feature Referenced Document.

Billing Cycle Documents

(Sales – A/R > Delivery)

(Sales – A/R > A/R Invoice)

Once Items are rented, Billing Cycle Documents will be automatically created according to the Billing Cycle configuration. The Billing Cycle document can be either a Delivery or an AR Invoice document, according to the ER Configuration. This is the same as explained in the Rent Process section.

AP Invoice

(Purchasing – A/P > A/P Invoice)

The screenshot shows the SAP A/P Reserve Invoice form. At the top, the title is "A/P Reserve Invoice". The form is divided into several sections:

- Vendor Information:** Vendor (V10000), Name (Acme Associates), Contact Person (Sarah Kierl), Vendor Ref. No., and Local Currency.
- Invoice Details:** No. (Primary 1170), Status (Open), Posting Date (19/02/2021), Due Date (22/03/2021), and Document Date (19/02/2021).
- Item Table:** A table with columns: #, Item No., Quantity, Unit Price, Disc..., Tax C..., Total (LC), UoM Code, and Country of Origin. The first row shows Item No. NSV74900, Quantity 999,999, Disc... 0.000, Tax C... NY, and UoM Code R.M.
- Buyer/Owner Information:** Buyer (James Chan), Owner (Cuadra, Christine).
- Summary Fields:** Total Before Discount, Discount (%), Total Down Payment, Freight, and Rounding (0.00 \$).

An AP Invoice will be posted by the user. This document will be posted against the Purchase Order line that has the Quantity 999,999: It represents the bill that the vendor issued.

Rental Return

(Resolv > Resolv Equipment Rental > Rental Return)

This screen creates a Rental Return Billing Document. This document can be an additional charge or a credit which relates to the dollar amount from the last day a Delivery/AR Invoice was issued and the day that the product was returned. This is the same as explained in the Rent Process.

Line	Item	Code	Description	Type	Rate	Start Date	End Date	Qty	Unit	Item	Description	Rate
18	1306	C20000	Maxi-Teq	Rent	135	21/12/2018		1.000	01	A00006	Rainbow 1200 Laser Series	1096
19	1307	C20000	Maxi-Teq	Rent	137	21/12/2018		1.000	01	A00001	J.B. Officeprint 1420	
20	1307	C20000	Maxi-Teq	Rent	137	21/12/2018		1.000	01	A00006	Rainbow 1200 Laser Series	
21	1308	C20000	Maxi-Teq	Rent	139	21/12/2018		1.000	01	A00001	J.B. Officeprint 1420	
22	1308	C20000	Maxi-Teq	Rent	139	21/12/2018		1.000	01	A00006	Rainbow 1200 Laser Series	
23	1311	C20000	Maxi-Teq	Rent	142	21/12/2018		1.000	01	A00001	J.B. Officeprint 1420	
24	1311	C20000	Maxi-Teq	Rent	142	21/12/2018		1.000	01	A00006	Rainbow 1200 Laser Series	
25	1324	C40000	Earthshaker Corporation	Rent	150	17/01/2019		1.000	01	A00006	Rainbow 1200 Laser Series	
26	1325	C20000	Maxi-Teq	Rent	152	22/01/2019		4.000	01	A00001	J.B. Officeprint 1420	
27	1328	C20000	Maxi-Teq	Rent	156	25/01/2019		1.000	01	A00001	J.B. Officeprint 1420	1111
28	1359	C20000	Maxi-Teq	Re-rent	31	13/02/2019		1.000	07	A00001	J.B. Officeprint 1420	1140
29	1495	C20000	Maxi-Teq	Rent	299	24/05/2019		2.000	01	A00001	J.B. Officeprint 1420	1916
30	1502	C20000	Maxi-Teq	Rent	309	31/05/2019		1.000	01	A00001_serialized	J.B. Officeprint 1420	1941
31	1525	C20000	Maxi-Teq	Rent	344	14/06/2019		4.000	01	A00001	J.B. Officeprint 1420	2011
32	1531	C20000	Maxi-Teq	Rent	342	14/06/2019		1.000	01	A00001_serialized	J.B. Officeprint 1420	
33	1553	C20000	Maxi-Teq	Rent	362	05/07/2019		1.000	01	A00006	Rainbow 1200 Laser Series	
34	1557	C20000	Maxi-Teq	Sell	1756	03/07/2019		1.000	09	A00001	J.B. Officeprint 1420	
35	1602	C20000	Maxi-Teq	Rent	399	26/08/2019		2.000	01	A00006	Rainbow 1200 Laser Series	
36	1671	C23900	Parameter Technology	Rent	458	02/03/2020		1.000	01	A00006	Rainbow 1200 Laser Series	
37	1674	C25000	Star Company	Rent	470	31/03/2020		2.000	05	A00006	Rainbow 1200 Laser Series	
38	1697	ABC3	ABC3	Rent	505	27/04/2020		1.000	01	A00001	J.B. Officeprint 1420	
39	1703	C20000	Maxi-Teq	Rent	517	09/06/2020		1.000	01	Dumper	Dumper	2049
40	1703	C20000	Maxi-Teq	Rent	517	09/06/2020		1.000	01	MiniExc	Mini Excavadora	2049
41	1703	C20000	Maxi-Teq	Rent	517	09/06/2020		1.000	01	HECM2800	Grupos Electrogenos Portatiles	2049
42	1708	ABC2	ABC2	Rent	522	20/10/2020		1.000	01	Rental NDUBE	Rental NDUBE	
43	1726	C25000	Star Company	Re-rent	37	19/02/2021		1.000	08	NSV74900	Re-Rent Item	

Manual Billing

(Resolv > Resolv Equipment Rental > Rental Manual Billing)

Billing Cycle Cutoff Date		
	09/03/2021	
Customer Code	From	To
Rental Doc No.		
Billing Cycle		
Rent From Warehouse		

Enter the Billing Cycle Cutoff Date, by default the system will open with the current date. You can filter the documents by Customer code, Rental Doc No., Billing Cycle and Rent from Warehouse. The system will open the list of documents based on the filters.

#	Sel	Rental Doc	Customer Ref. No.	Customer	Name	Type	Item	Description	Quantity	Start	End Date	Billing Cycle	From Wh	UoM Code	Unit Price	Draft No.	Line Total
1	<input type="checkbox"/>	1647		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
2	<input type="checkbox"/>	1647		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
3	<input type="checkbox"/>	1648		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
4	<input type="checkbox"/>	1648		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
5	<input type="checkbox"/>	1649		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
6	<input type="checkbox"/>	1649		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
7	<input type="checkbox"/>	1650		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00	2529	400.00
8	<input type="checkbox"/>	1650		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00	2529	131.00
9	<input type="checkbox"/>	1651		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00	2529	400.00
10	<input type="checkbox"/>	1651		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00	2529	131.00
11	<input type="checkbox"/>	1652		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
12	<input type="checkbox"/>	1652		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
13	<input type="checkbox"/>	1654		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual Draft	01	R.M	400.00	3060	7,200.00
14	<input type="checkbox"/>	1654		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual Draft	01	R.M	131.00	3060	2,358.00
15	<input type="checkbox"/>	1655		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual Draft	01	R.M	400.00	2534	7,200.00
16	<input type="checkbox"/>	1655		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual Draft	01	R.M	131.00	2534	2,358.00
17	<input type="checkbox"/>	1679		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
18	<input type="checkbox"/>	1679		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
19	<input type="checkbox"/>	1698		ABC3	ABC3	Rent	A00001	J.B. Officeprint 1420	1.000	29/11/2020	29/11/2020	28D Manual	05	R.M	130.00		
20	<input type="checkbox"/>	1699		ABC3	ABC3	Rent	A00001	J.B. Officeprint 1420	1.000	29/11/2019	29/11/2020	28D Manual Draft	05	R.M	130.00	1885	130.00
21	<input type="checkbox"/>	1731		C25000	Star Company	Rent	A00001	J.B. Officeprint 1420	1.000	01/01/2021	01/01/2022	28D Manual	01	R.M	130.00		
22	<input type="checkbox"/>	1732		C25000	Star Company	Rent	A00001	J.B. Officeprint 1420	1.000	01/01/2021	01/01/2022	28D Manual	01	R.M	130.00		

Total Selected Drafts: 0.00

[Process](#) [Cancel](#) [Create Billing Docs](#) [Summarized Billing](#)

Select the documents that you want to process, click in the Process button, the document will disappear from the screen and the Document Processor will create a draft Delivery/Invoice in the next run.

#	Sel	Rental Doc	Customer Ref. No.	Customer	Name	Type	Item	Description	Quantity	Start	End Date	Billing Cycle	From Wh	UoM Code	Unit Price	Draft No.	Line Total
1	<input checked="" type="checkbox"/>	1647		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
2	<input checked="" type="checkbox"/>	1647		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
3	<input checked="" type="checkbox"/>	1648		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
4	<input checked="" type="checkbox"/>	1648		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
5	<input checked="" type="checkbox"/>	1649		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
6	<input checked="" type="checkbox"/>	1649		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
7	<input checked="" type="checkbox"/>	1650		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00	2529	400.00
8	<input checked="" type="checkbox"/>	1650		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00	2529	131.00
9	<input checked="" type="checkbox"/>	1651		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00	2529	400.00
10	<input checked="" type="checkbox"/>	1651		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00	2529	131.00
11	<input checked="" type="checkbox"/>	1652		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
12	<input checked="" type="checkbox"/>	1652		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
13	<input checked="" type="checkbox"/>	1654		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual Draft	01	R.M	400.00	3060	7,200.00
14	<input checked="" type="checkbox"/>	1654		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual Draft	01	R.M	131.00	3060	2,358.00
15	<input checked="" type="checkbox"/>	1655		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual Draft	01	R.M	400.00	2534	7,200.00
16	<input checked="" type="checkbox"/>	1655		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual Draft	01	R.M	131.00	2534	2,358.00
17	<input checked="" type="checkbox"/>	1679		C20000	Maxi-Teq	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		28D Manual	01	R.M	400.00		
18	<input checked="" type="checkbox"/>	1679		C20000	Maxi-Teq	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		28D Manual	01	R.M	131.00		
19	<input checked="" type="checkbox"/>	1698		ABC3	ABC3	Rent	A00001	J.B. Officeprint 1420	1.000	29/11/2020	29/11/2020	28D Manual	05	R.M	130.00		
20	<input checked="" type="checkbox"/>	1699		ABC3	ABC3	Rent	A00001	J.B. Officeprint 1420	1.000	29/11/2019	29/11/2020	28D Manual Draft	05	R.M	130.00	1885	130.00
21	<input checked="" type="checkbox"/>	1731		C25000	Star Company	Rent	A00001	J.B. Officeprint 1420	1.000	01/01/2021	01/01/2022	28D Manual	01	R.M	130.00		
22	<input checked="" type="checkbox"/>	1732		C25000	Star Company	Rent	A00001	J.B. Officeprint 1420	1.000	01/01/2021	01/01/2022	28D Manual	01	R.M	130.00		

Total Selected Drafts: 0.00

[Process](#) [Cancel](#) [Create Billing Docs](#) [Summarized Billing](#)

You can find the draft document under Sales Reports – Document Drafts Report, or you can open the Rental Manual Billing and the system will show the draft document on the row.

After the system created the draft document, you can choose the Rental Documents, and create the final Delivery/Invoice clicking in Create Billing Docs button.

#	Qty	Rental Doc	Customer Ref. No.	Customer	Name	Type	Item	Description	Quantity	Start	End Date	Billing Cycle	From Vth	UoM Code	Unit Price	Draft No.	Line Total
1		1647		C2000	Maxi-Tec	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		280 Manual	01	R.M	400.00		
2		1647		C2000	Maxi-Tec	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		280 Manual	01	R.M	131.00		
3		1648		C2000	Maxi-Tec	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		280 Manual	01	R.M	400.00		
4		1648		C2000	Maxi-Tec	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		280 Manual	01	R.M	131.00		
5		1649		C2000	Maxi-Tec	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		280 Manual	01	R.M	400.00		
6		1649		C2000	Maxi-Tec	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		280 Manual	01	R.M	131.00		
7		1650		C2000	Maxi-Tec	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		280 Manual	01	R.M	400.00	2529	400.00
8		1650		C2000	Maxi-Tec	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		280 Manual	01	R.M	131.00	2529	131.00
9		1651		C2000	Maxi-Tec	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		280 Manual	01	R.M	400.00	2529	400.00
10		1651		C2000	Maxi-Tec	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		280 Manual	01	R.M	131.00	2529	131.00
11		1652		C2000	Maxi-Tec	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		280 Manual	01	R.M	400.00		
12		1652		C2000	Maxi-Tec	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		280 Manual	01	R.M	131.00		
13		1654		C2000	Maxi-Tec	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		280 Manual Draft	01	R.M	400.00	3060	7,200.00
14		1654		C2000	Maxi-Tec	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		280 Manual Draft	01	R.M	131.00	3060	2,358.00
15		1655		C2000	Maxi-Tec	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		280 Manual Draft	01	R.M	400.00	2534	7,200.00
16		1655		C2000	Maxi-Tec	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		280 Manual Draft	01	R.M	131.00	2534	2,358.00
17		1679		C2000	Maxi-Tec	Rent	A00006	Rainbow 1200 Laser Series	1.000	01/10/2019		280 Manual	01	R.M	400.00		
18		1679		C2000	Maxi-Tec	Rent	A00001	J.B. Officeprint 1420	1.000	01/10/2019		280 Manual	01	R.M	131.00		
19		1698		ABC3	ABC3	Rent	A00001	J.B. Officeprint 1420	1.000	29/11/2019	29/11/2020	280 Manual	05	R.M	130.00		
20		1699		ABC3	ABC3	Rent	A00001	J.B. Officeprint 1420	1.000	29/11/2019	29/11/2020	280 Manual Draft	05	R.M	130.00	1885	130.00

Process Cancel Total Selected Drafts: 19,116.00 Create Billing Docs Summarized Billing

The Rental Document will disappear from the window.

The Summarized Billing button will be used to trigger the processor to summarize rental billing. The processor will create a new draft billing document. If the Summarized Billing option is used in the middle of a billing cycle, only full billing cycles will be considered, and remaining days from the last billing cycle up to billing cycle cutoff date will be disregarded for billing cycle documents created from the Rental Manual Billing screen.

Sell to Return

If a rented item is lost, damaged, or consumed after it was rented, the system allows to sell the item from the Rented Warehouse.

Create a new Sales Order or Delivery document for the same customer and item.

The screenshot shows a 'Sales Order' window. At the top, there are fields for Customer (C26000), Name (River Inc), Contact Person (Levis Beerman), and Currency (\$). A summary table on the right shows: No. 1738, Status Open, Posting Date 11/03/2021, Delivery Date 11/03/2021, and Document Date 11/03/2021. The main table has columns for Item/Service Type, Item No., Item Description, Rent from W..., Rental Type, UoM Code, Rental Quantity, Rental Start Date, Rental End Date, Rental Billing Cycle, Re-rent Unit..., Unit Price, Discount %, Quantity, Tax C..., and Total (LC). Two rows are visible, both for item A00001 (J.B. Officeprint 1420) with a unit price of 2,000.00 \$ and a quantity of 1. Below the table, there are fields for Sales Employee (Sales Manager) and Owner (Cuadra, Christine). A summary table at the bottom right shows: Total Before Discount 2,000.00 \$, Discount %, Freight, Rounding 0.00 \$, Tax 165.00 \$, and Total 2,165.00 \$.

Change the warehouse to rented Warehouse, the system will open the list of open Rental Orders

The screenshot shows a dialog box titled 'List of Rented Items for Customer C26000'. It contains a table with the following data:

#	Sel	Rental Doc	Customer Ref. No.	Doc Row	Item No.	Description	Rented Qty	Warehouse
	<input type="checkbox"/>	1709		2	A00001	J.B. Officeprint 1420	1.00	01
	<input type="checkbox"/>	1715		1	A00001	J.B. Officeprint 1420	1.00	01
	<input type="checkbox"/>	1719		1	A00001	J.B. Officeprint 1420	1.00	01
	<input type="checkbox"/>	1735		1	A00001	J.B. Officeprint 1420	1.00	01
	<input type="checkbox"/>	1736		1	A00001	J.B. Officeprint 1420	1.00	01

At the bottom of the dialog, there are 'Choose' and 'Cancel' buttons.

Choose the row and add the Sales Order.

After adding the Delivery, the system will decrease the item quantities in Rental Warehouse, the document will show the Rental Order based document.

Delivery

Customer → C26000
 Name River Inc
 Contact Person → Lewis Beerman
 Customer Ref. No.
 Local Currency

Contents
Logistics
Accounting
Attachments

Item/Service Type		Item									
#	Type	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	Rental Base D...	Bin Location Allocation	UoM Code	COGS Branch
1		→ A00001	1	2,000.00 \$	0.000	→ NY	2,000.00 \$	→ 1719	→ 1	Each	

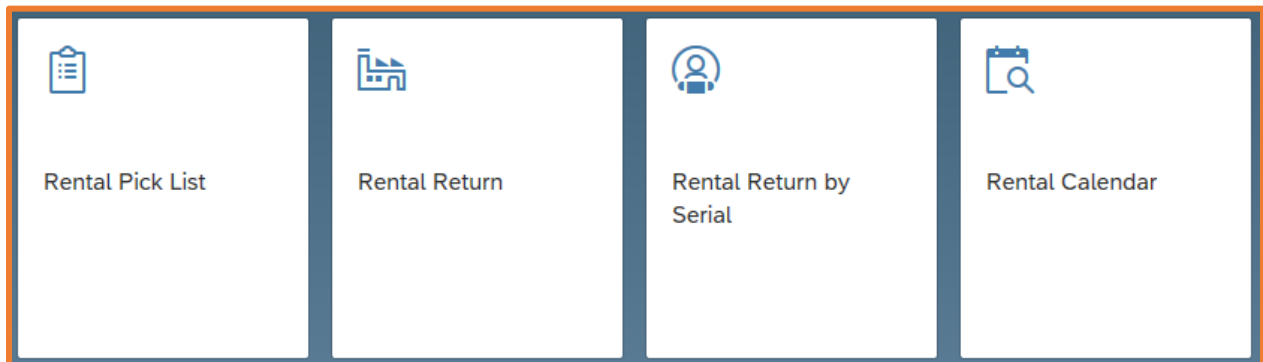
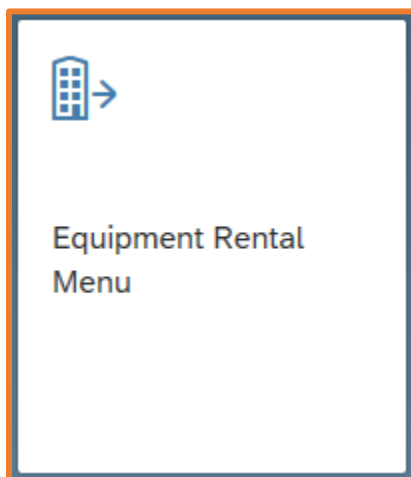
Sales Employee Sales Manager
 Owner → Cuadra, Christine

Integration with Resolv Mobile

Using Equipment Rental in Resolv Mobile, in addition to inside SAP allows your warehouse users to pick and receive returned items from rental by means of the handheld devices. It also can give you some reporting and analytic tools such as Rental Calendars to help you maintain your overall rental workflow.

Equipment Rental Menu

Main Menu > Equipment Rental



Rental Pick List

Once the Rental Pick List is generated in SAP Business One, you can go to your mobile device and pick it. This will transfer the items from the picking warehouse to the rental warehouse.

Start by selecting your warehouse and scanning your rental pick list number. If you do not know the pick list number, you can use the lookup button to find it. After you select your pick list, items from that pick list will be displayed on the bottom grid.

Bin	Item	Ord Qty	Picked Qty	UOM	Description	Whse	Line	Picked Bin	Alt Sort
01-SYSTEM-BIN-LOCATION	A00001	1.000	0.000	Each	J.B. Officeprint 1420	01	1		>
01-SYSTEM-BIN-LOCATION	A00006	1.000	0.000	Each	Rainbow 1200 Laser Series	01	2		>

Next, scan the bin location and the item you want to pick first. If you do not have barcodes for the bins or items, you can enter them manually or select the row from the bottom grid to pull it up. You can also use the lookup option in the bin field to get a list of bins to choose from.

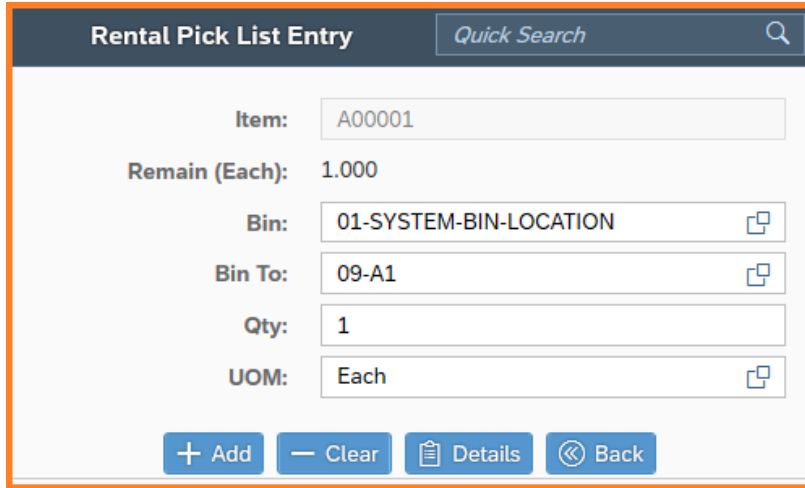
You can also enter a value into the Bin To field, which will be the Rental Warehouse bin that this item will be transferred to, but because most setups will only have 1 bin in their Rental Warehouses, the system will automatically fill it in for you.

Bin: 01-SYSTEM-BIN-LOCATION

Bin To: 09-A1

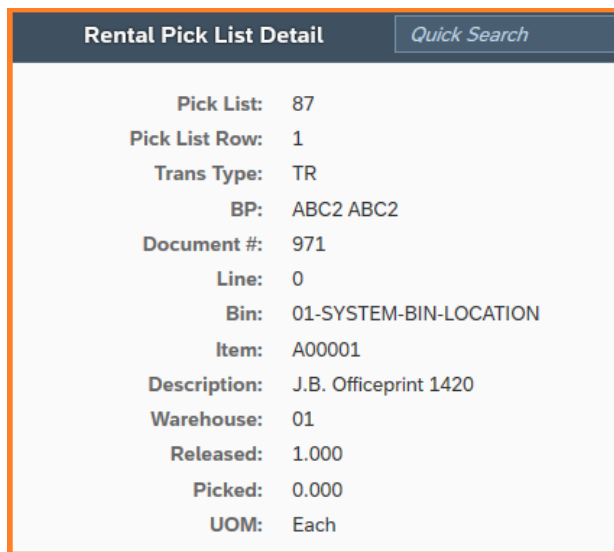
Item: A00001

After your item is selected you will be brought to the Rental Pick List Entry screen. In here it will show you how much of the selected item is remaining to be picked. It will also let you change (or choose if you did not already on the previous screen) the bin you want to pick this item from (and transfer it to). Next, enter the quantity and UoM you are picking for this item and hit Add.



After you hit Add, if the item is not Batch or Serial managed, it will come back to the main Rental Pick List screen and it will show the Picked Qty in the row.

There are a few other buttons on this screen as well; Clear will remove all the data in the current fields, Back will bring you to the previous screen without saving, and Details will show you a bit more information about the selected item.



If, however, your item is Batch or Serial Managed, it will instead bring you to Serial or Batch Entry Out screen where you will select the batch or serial numbers you are picking for the selected item.

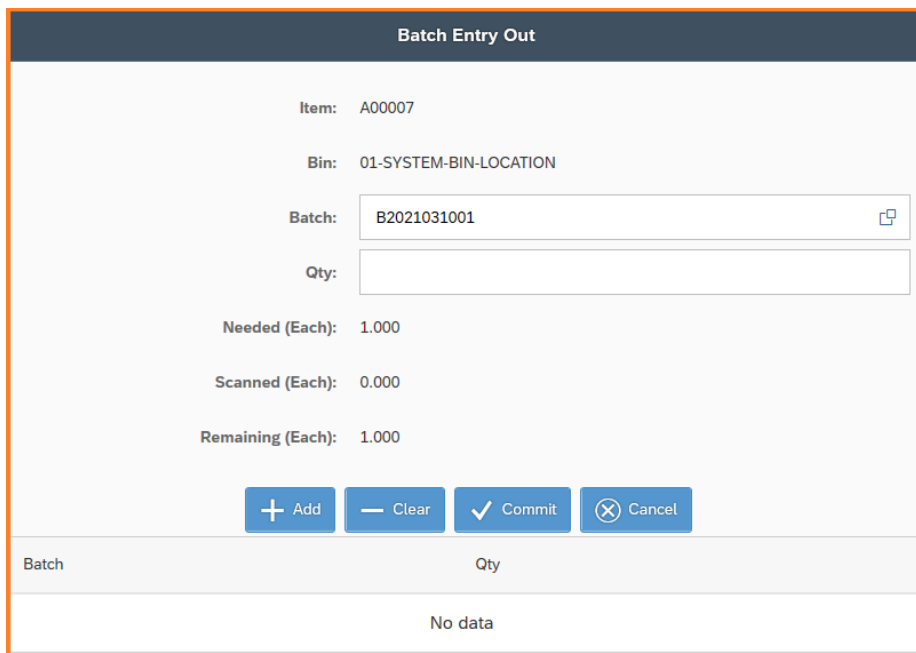
Batch/Serial Managed Items

The Batch and Serial Entry Out screens are the same throughout the mobile device. You will see them when you are taking a serial or batch managed item from inventory via documents such as pick lists and goods issues. We will first look at the Batch Entry Out screen.

Batch Entry Out

Start by entering/scanning your first batch number and quantity for the current item (note that the quantity in this screen will be recorded in the Inventory UoM).

Below the Batch and Qty fields you will see fields called Needed, Scanned, and Remaining. These will show the batch quantity that is needed, how many have already been scanned, and how many are left to be scanned for this item and document.



Batch	Qty
No data	

As you finish scanning each batch they will be added to the bottom grid.

You will continue scanning batches and quantities until you are finished, and the system returns you to the main Rental Pick List screen. If you are only partially shipping the current item, then you can hit the Commit button whenever you are finished, which will also bring you back to the main screen.

Now let us look at the Serial Entry Out screen.

Serial Entry Out

Start by entering/scanning your first serial number for the current item (note that the quantity in this screen will be recorded in the Inventory UoM). Since serial numbers are unique you do not have to enter a quantity; the system automatically sets each number as 1.

Below the Serial # field you will see fields called Needed, Scanned, and Remaining. These will show the number of serial numbers that are needed, how many have already been scanned, and how many are left to be scanned for this item and document.

Serial Entry Out

Item: A00006

Bin: 01-SYSTEM-BIN-LOCATION

Serial #:

Needed (Each): 1.000

Scanned (Each): 0

Remaining (Each): 1.000

+ Add
- Clear
✓ Commit
⊗ Cancel

Serial #	Mfr Ser #	Lot #	Details
No data			

As you finish scanning each serial number they will be added to the bottom grid.

You will continue scanning serial numbers until you are finished, and the system returns you to the main Rental Pick List screen. If you are only partially shipping the current item, then you can hit the Commit button whenever you are finished, which will also bring you back to the main screen.

Let us now return to complete the Rental Pick List process

Rental Pick List Cont'd

Back on the main Rental Pick List screen you will see the Picked Qty column update with the quantities that you have picked.

<
Rental Pick List
Quick Search

Warehouse:

Pick List:

Bin:

Bin To:

Item:

Clear
Finish
Cancel

⚙️
↕️
📄 Details
 Quick Scan
 Hide Finished

Bin	Item	Ord Qty	Picked Qty	UOM	Description	Whse	Line	Picked Bin	Alt Sort
01-SYSTEM-BIN-LOCATION	A00001	1.000	1.000	Each	J.B. Officeprint 1420	01	1	01-SYSTEM-BIN-LOCATION	>
01-SYSTEM-BIN-LOCATION	A00006	1.000	1.000	Each	Rainbow 1200 Laser Series	01	2	01-SYSTEM-BIN-LOCATION	>

Once you are done picking select the Finish button and the system will ask if you want to finish this document.

⚠️
Rental Pick List

Do you want to Finish this document?

Finish
Cancel

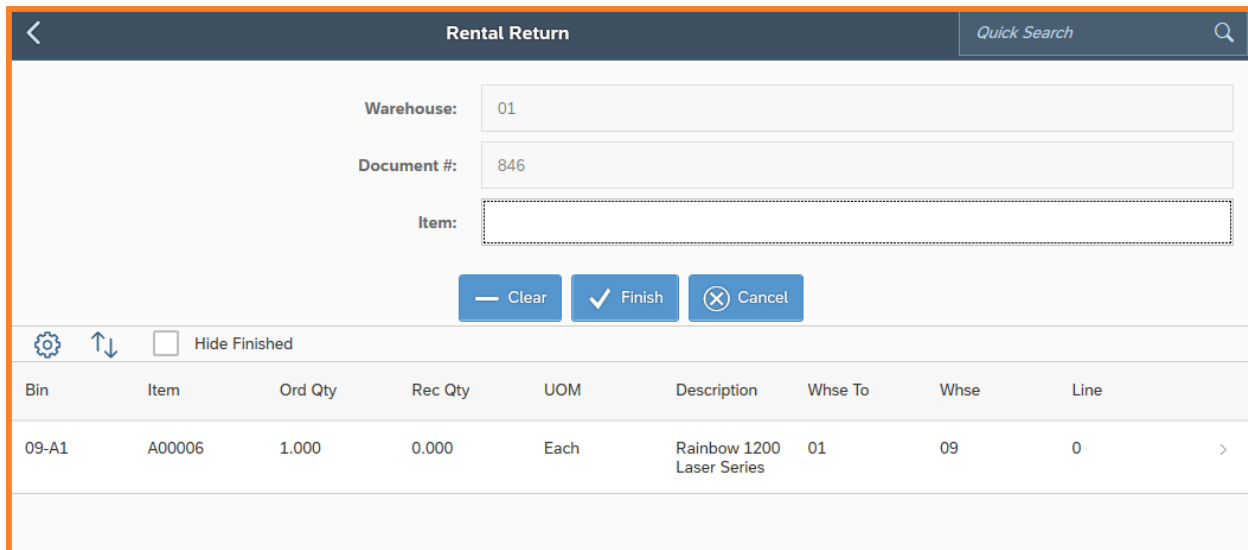
If you decide you are not done and need to go back, you can choose Cancel and it will bring you back to the Rental Pick List screen. If you choose Finish, it will complete the Rental Picking session, update your pick list document, and create an Inventory Transfer inside of SAP.

Rental Return

When items are received back from rental, you need to receive them back into inventory from the rental warehouse.

To begin, select your warehouse and scan/enter, or select from the document lookup, your Rental Order number. This will display the items from your Rental Order on the bottom grid.

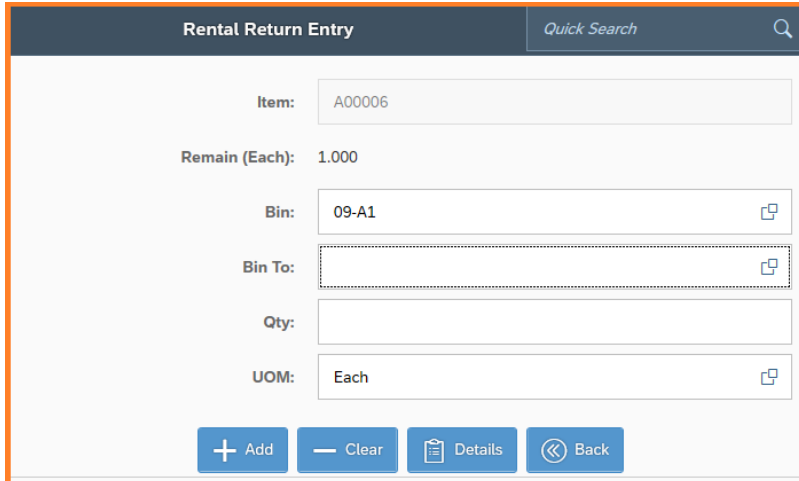
Note, the warehouse you select is the warehouse you are receiving the items into not the rental warehouse.



Bin	Item	Ord Qty	Rec Qty	UOM	Description	Whse To	Whse	Line
09-A1	A00006	1.000	0.000	Each	Rainbow 1200 Laser Series	01	09	0

Next, scan the item code you are receiving. If you do not have barcodes for the item, you can enter it manually or select the row from the bottom grid to pull it up.

After your item is selected you will be brought to the Rental Return Entry screen. In here, it will show you how much of the item is left to be received. It will also let you change the bin you want to receive the item into (or transfer from). Then enter/confirm the quantity and the UoM for the item.



Once all that information is entered in, click on Add.

There are a few other button options on this screen as well; Clear will remove all the data in the current fields, Back will bring you to the previous screen without saving, and Details will show you a bit more information about the selected item.



After you hit Add, if the item is not Batch or Serial managed, it will bring you back to the main Rental Return screen.

If, however, your item is Batch or Serial Managed, it will instead bring you to Serial or Batch Entry Out screen (which we covered earlier in this document) where you will select the batch or serial numbers you are returning for the selected item.

<
Rental Return
Quick Search

Warehouse:

Document #:

Item:

Clear
Finish
Cancel

Hide Finished

Bin	Item	Ord Qty	Rec Qty	UOM	Description	Whse To	Whse	Line
09-A1	A00006	1.000	1.000	Each	Rainbow 1200 Laser Series	01	09	0 >

Once you are done receiving the rental items, select the Finish button and the system will ask if you want to finish this document.

⚠ **Rental Return**

Do you want to Finish this document?

Finish
Cancel

If you decide you are not done and need to go back, you can choose Cancel and it will bring you back to the Rental Return screen. If you choose Finish, it will complete the Rental Return session and create an Inventory Transfer inside of SAP.

Rental Return by Serial

When items are received back from rental, you need to receive them back into inventory from the rental warehouse. Use Rental Return by Serial when want to just scan the return item’s serial number and let the system determine the Rental Order number.

To begin, select your warehouse and scan/enter, or select from the document lookup, your Rental Order number. This will display the items from your Rental Order on the bottom grid.

Note, the warehouse you select is the warehouse you are receiving the items into not the rental warehouse.

The screenshot shows the 'Rental Return by Serial' interface. At the top, there is a title bar with a back arrow, the text 'Rental Return by Serial', and a 'Quick Search' button with a magnifying glass icon. Below the title bar are four input fields: 'Warehouse:' with the value '01', 'Serial:' with a vertical bar cursor, 'Item:', and 'Bin:'. Each field has a copy icon to its right. Below the input fields are four buttons: '+ Add', '- Clear', '✓ Finish', and '✗ Cancel'. At the bottom left, there are icons for settings (gear) and sort (up/down arrows). Below these icons is a table header with the following columns: Serial #, Mfr Ser #, Lot #, Item, Transfer, Tran Date, SO, SO Line, Customer, Customer Name, Customer Reference#, and Return Request. The table body contains the text 'No data'.

Next, scan the serial number you are returning. If you do not have barcodes for the serial number, you can enter it manually or select from the serial lookup.

After your serial number is selected, if there is only one open rental item for that serial number, the item field will automatically be populated. If there are multiple items, you can manually enter the item or select the item from the item lookup. Next you need to enter then bin you are returning the serial number to.

Once everything is entered, click Add. This will add the information to the grid below and you can continue with the next serial number to return.

<
Rental Return by Serial
>

Warehouse: 🔍

Serial: 🔍

Item: 🔍

Bin: 🔍

+ Add
— Clear
✓ Finish
✕ Cancel

⚙️
↕️

Serial #	Mfr Ser #	Lot #	Item	Transfer	Tran Date	SO	SO Line	Customer	Customer Name	Customer Reference	Return Request
1234	1234	1234	A00006	527	10/03/20 21	1719	1	ABC2	ABC2		>

Once you are done receiving the rental serial numbers, select the Finish button and the system will ask if you want to post these records.

❓ Rental Return by Serial

Are you sure you want to POST these records?

Yes
No

If you decide you are not done and need to go back, you can choose No and it will bring you back to the Rental Return by Serial screen. If you choose Yes, it will complete the Rental Return by Serial session and create an Inventory Transfer inside of SAP.

Rental Calendar

The Rental Calendar gives you the ability to see what items or items groups are out for rent and when they are expected to be returned.

To begin, select/scan/enter the item or item group you want to view. Lookups are available for both fields and will be limited to items that are marked as rental items in SAP Business Item Master. Click display to populate the calendar. The Clear button will clear the item and item group fields.

The rental calendar has two views, one for item and other for item group. The item view will display just rental information for the selected item. Whereas the item group view will display totals for all the rental items in that group.

Rental Calendar Item View

	Wed	Thu	Fri	Sat	Sun	Mon	Tue
	10	11	12	13	14	15	16
A00008 Rainbow 2200 L...	28.000 In Stock	28.000 In Stock	28.000 In Stock	28.000 In Stock	28.000 In Stock	28.000 In Stock	28.000 In Stock
	3.000 Rented	3.000 Rented	3.000 Rented	3.000 Rented	3.000 Rented	3.000 Rented	2.000 Rented
	0.000 Returned	0.000 Returned	0.000 Returned	0.000 Returned	0.000 Returned	0.000 Returned	1.000 Returned

The rental calendar dates are based on the rental orders rental start and rental end dates. If the rental end date is prior to today it will always show up on the calendar for today's date. Also, if there is no rental end date on the rental order, 12/31/2049 will be used.

There are three numbered/colored boxes for each day and each box can be selected to see the details behind each number displayed.

In Stock - This is the current inventory for all warehouses that this item is in.

Warehouse Quantities

Whse Records: 3

Whse	Whse Name	In Stock	Committed	Ordered	Available
01	General Warehouse	9.000	0.000	0.000	9.000
02	West Cost Warehouse	12.000	0.000	0.000	12.000
05	Bin Warehouse	7.000	0.000	0.000	7.000

Rented - This is the rental orders that have a start date as of or prior to the date selected and an end date after the date selected. Here are the details for March 10th. If you select a row, it will display the rental order.

Rented

Sales Order Records: 3

Sales Order	Line	Start Date	End Date	Serial	Qty
1721	1	03/01/2021	03/15/2021	2021030100	1.000 >
1722	0	03/10/2021	04/10/2021	2021030101	1.000 >
1723	0	03/09/2021	03/10/2022	2021030102	1.000 >

If you select a row, it will display the rental order details.

<
Sales Order 1721

BP: ABC2
 Name: ABC2
 Contact Person: Max Teq
 Customer Reference#:
 Branch:
 Status: Open
 Posting Date: 03/10/2021
 Delivery Date: 03/10/2021
 Document Date: 03/10/2021

Item	Item Description	Whse	Qty	UOM	Unit Price	Ship-To	Ship Type
A00008	Rainbow 2200 Laser Series	07	999999.000	R.M	0.00 \$	Ship to	Fedex EM

Sales Employee: Sales Manager
 Remarks:
 Total Before Discount: 220.00 \$
 Discount: 0.00 \$
 Freight: 0.00 \$
 Tax: 13.20 \$
 Total: 233.20 \$

Rental Items
Cancel

Selecting the Rental Item button will display the rental information for all rental items on the order.

<
Rental Items

Item	Whse From	Rental Qty	Re-Rent Cost	Start Date	End Date	Billing Cycle	Open Qty	Rented Qty	Exch Qty	Returned Qty
A00008	01	1.000		03/01/2021	03/15/2021	M28	0.000	1.000	0.000	0.000

Returned - This is the rental orders that have an end date as of or prior to the date selected. Here are the details for March 16th where it shows 1 returned. If you select the row, it will display the rental order details and rental information like it does for rented.

<
Returned

Sales Order 🔍 ⚙️ ↕️ Records: 1

Sales Order	Line	Start Date	End Date	Serial	Qty
1721	1	03/01/2021	03/15/2021	2021030100	1.000

Rental Calendar Item Group View

The item group view work just like the item view with a few exceptions.

The item group view display how many rental items are in the item group.

The rented and returned details shows the item code and selecting a row will load that item in the calendar.

Item	Sales Order	Line	Start Date	End Date	Qty	
A00006	1221	1	11/16/2018	11/16/2018	1.000	>
A00006	1673	0	03/06/2020	03/20/2020	2.000	>
A00006	1627	0	10/14/2019	10/16/2019	1.000	>
A00006	1517	0	06/10/2019	06/10/2019	2.000	>
A00006	1706	1	06/06/2020	08/06/2020	2.000	>
A00006	1672	1	03/06/2020	03/13/2020	2.000	>

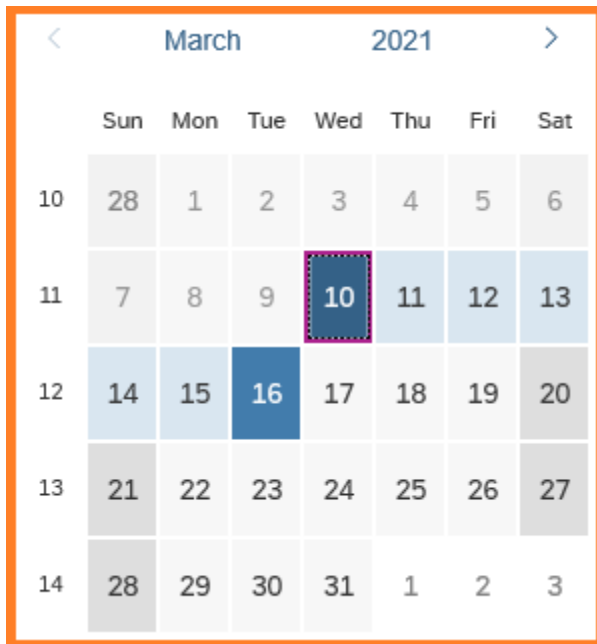
Rental Calendar Cont'd

Here are other options available on the Rental Calendar.

You can choose the format of the calendar; 1 week, Days, 1 Month, or Months



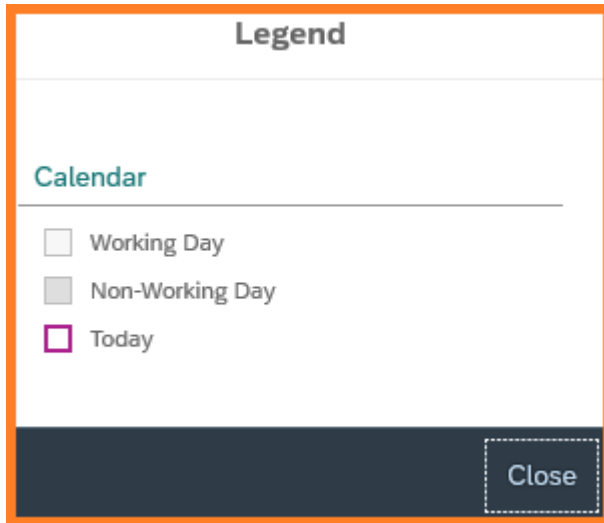
There is a date selection drop-down calendar with left and right arrows for you to either choose a specific date, or arrow to move forwards or backwards from the dates currently on the screen.



On the bottom left you will see several menu options.



The first icon will launch the Legend for the calendar.



The second icon will hide the row headers that list the Item/Item Group. This can be useful when using a smaller device.

The second to last icon will add a week number to the top of the calendar.

Wed	Thu	Fri	Sat	Sun	Mon	Tue
10	11	12	13	14	15	16
Week 10			Week 11			

And finally, the last icon will shrink the height of the calendar rows. This also can be useful when using a smaller device.

	Wed	Thu	Fri	Sat	Sun	Mon	Tue
	10	11	12	13	14	15	16
A00008 Rainbow 2200 Las...	28.000 In Stock	28.000 In Stock	28.000 In Stock	28.000 In Stock	28.000 In Stock	28.000 In Stock	28.000 In Stock
	3.000 Rented	3.000 Rented	3.000 Rented	3.000 Rented	3.000 Rented	3.000 Rented	2.000 Rented
	0.000 Returned	0.000 Returned	0.000 Returned	0.000 Returned	0.000 Returned	0.000 Returned	1.000 Returned