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	September 28, 2025
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1. ODTRMSM Connector Overview

1.1. ODTRMSM Connector Overview

The ODTRMSM Connector is designed for use with ODT Rentals 365 and ODT Service 365, and users who regularly use both applications. You can use the Connector to access new functionality that takes advantage of features in both Rentals and Service, allowing for a more seamless experience when performing business operations.

Features available for use with the Connector include:

- The ability to link a Rental Unit with a Service Unit
- Synchronise Metered Usage with a Service Meter
- Create Service Tickets for a Rental Unit from a Rental Contract
- Charge service performed on a Rental Unit back to a related Rental Contract

Please note that this user help document assumes that all necessary setups for ODT Rentals 365 and ODT



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Service 365 have already been performed, and that data such as Rental Units and Service Units already exist. Please refer to the ODT Rentals and ODT Service help documents if you require assistance with the setup of these applications.

1.2. ODTRMSM Connector Permission Setup

In order to setup the application, permission modeling is required to apply the proper level of security.

ODTRMSM Connector has no application specific permission sets. To use the Connector users must have both the ODT Service permission set and the ODT Rentals permission set.

All users require the D365 BASIC Permission Set as this is a required assignment for Microsoft Dynamics 365 Business Central.

In addition to the D365 BASIC, ODT Service, and ODT Rentals permission sets, users will as well need to have other Dynamics 365 Business Central Permission Sets assigned to them in order to setup or process Rentals and Service.

For information on assigning Permission Sets to Users or User Groups, see the Dynamics 365 Business Central help.

2. Linked Units

2.1. How to Link a Rental Unit and Service Unit

2.1.1. Overview

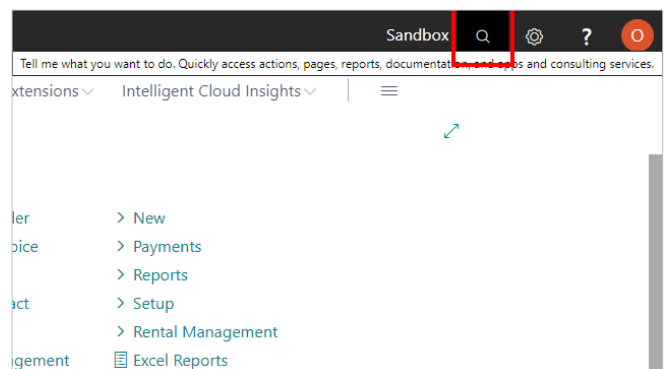
The ODTRMSM Connector allows for a Rental Unit and a Service Unit to be linked together. Linked units share certain information between them, and many features require that a Rental and Service Unit are linked.

Units can be linked by filling in the required fields, or they can be linked automatically when creating a new Service Unit from a Rental Unit.

2.1.2. How to Link Units Automatically

The following demonstrates how to link units automatically.

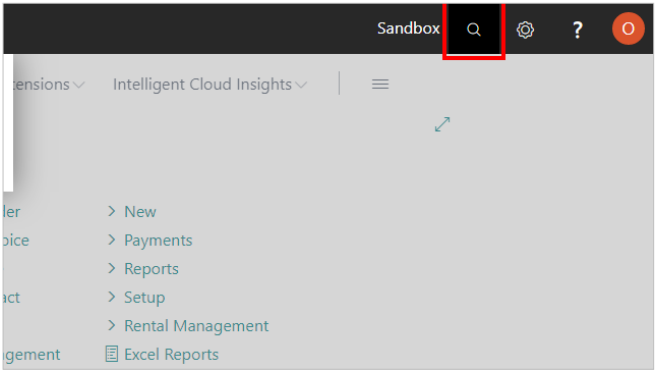
Click on the link **Tell me what you want to do.**
Quickly access actions, pages, reports, documentation, and apps and consulting services.



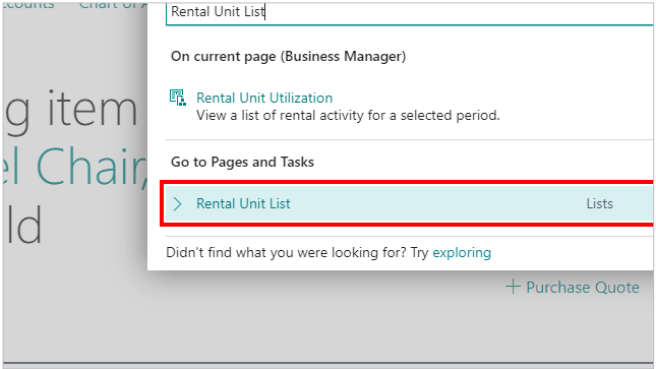


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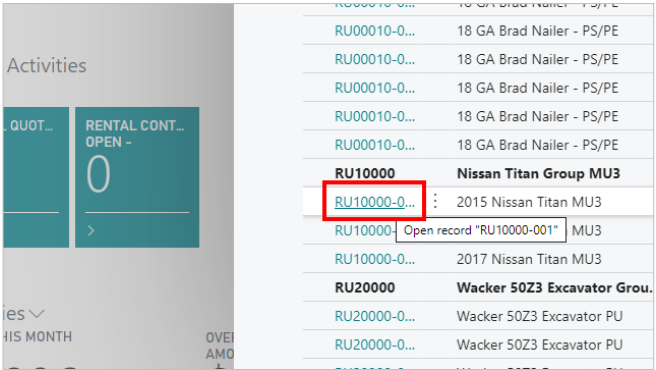
Enter the text **Rental Unit List**.



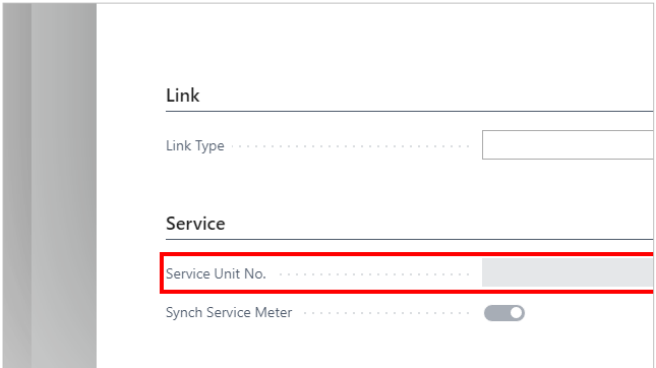
Click on **Rental Unit List Lists** ☐



Click on the link in cell **No.** with the value **RU10000-001**



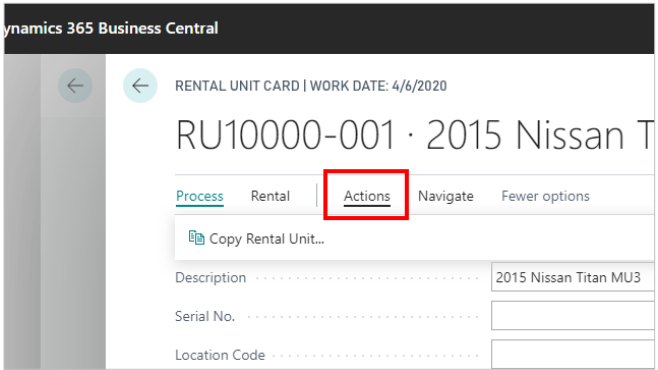
Notice that the field Service Unit No. is blank when the unit is not linked.





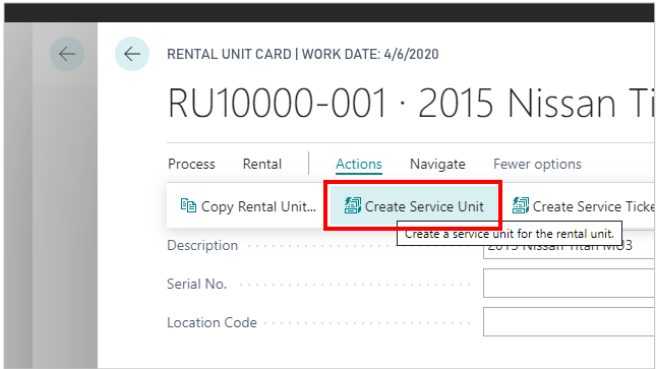
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Click on the navigation menu item popup **Actions**

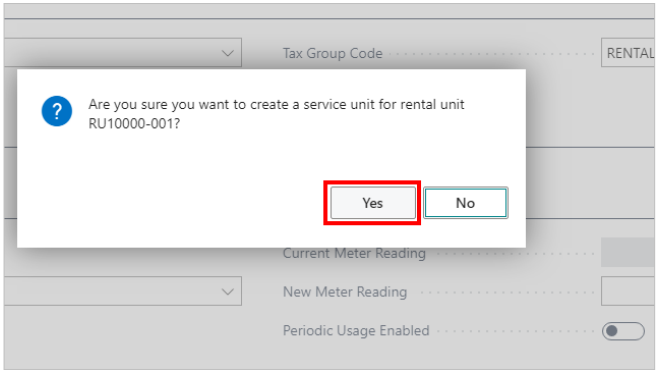


Click on the navigation menu item **Create Service Unit**

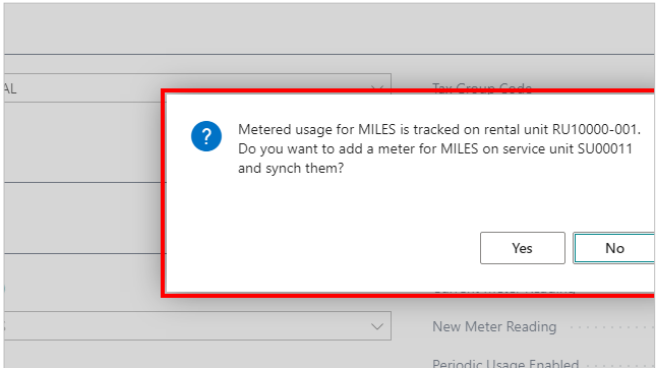
Selecting the option Create Service Unit will create a new service unit using information from the selected Rental Unit. This will also cause both units to become linked.



Click on the button **Yes**



If the selected Rental Unit requires Metered Usage, you will be given the option to create a matching Service Meter on the new Service Unit and link it with the Metered Usage of the Rental Unit.





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Click on the button **Yes**

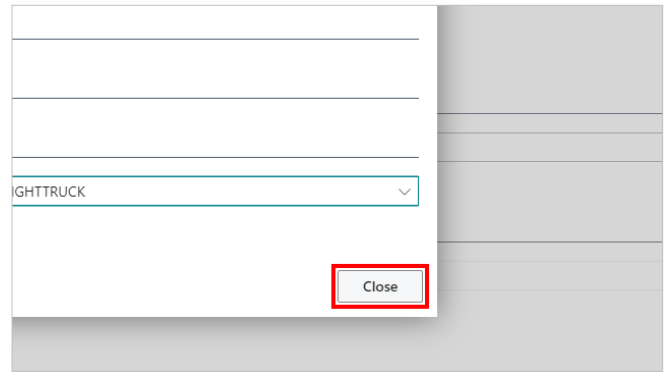
Information from the selected Rental Unit will be used to create the new Service Unit. Additional information may be added or modified as needed.

Please ensure that the new Service Unit has a Maintenance Group assigned to it, as this is a requirement for ODT Service 365 features.

Click on the lookup button **Maintenance Group Code**

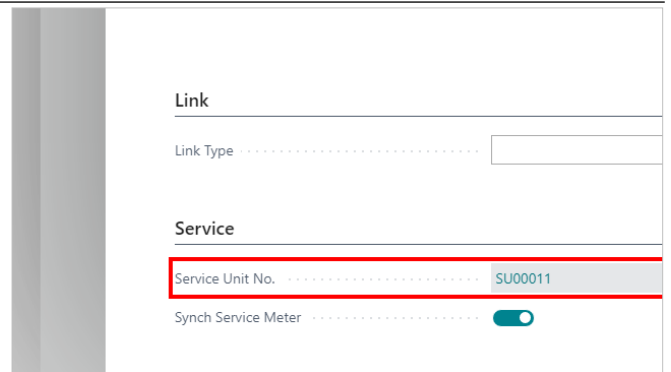
Click on the link in cell **Group Code** with the value **LIGHTTRUCK**

Click on the button **Close**



A modal window is displayed with a 'Close' button highlighted in a red box. The modal contains a dropdown menu with 'IGHTTRUCK' selected and a 'Close' button at the bottom right.

Notice that the Service Unit No. field no contains the number of the Service Unit that is linked to this Rental Unit.

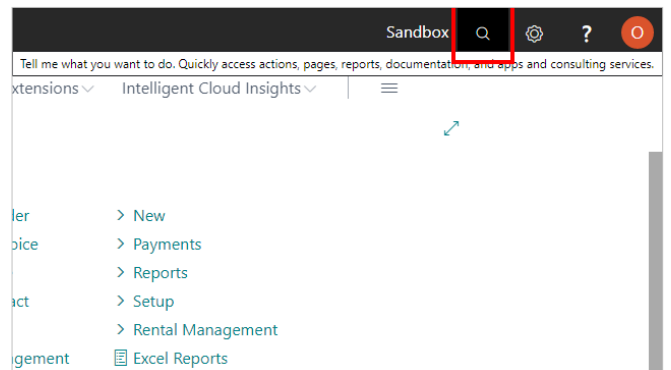


A 'Link' form is shown with fields for 'Link Type', 'Service', 'Service Unit No.', and 'Synch Service Meter'. The 'Service Unit No.' field is highlighted in a red box and contains the value 'SU00011'.

2.1.3. How to Link Units Manually

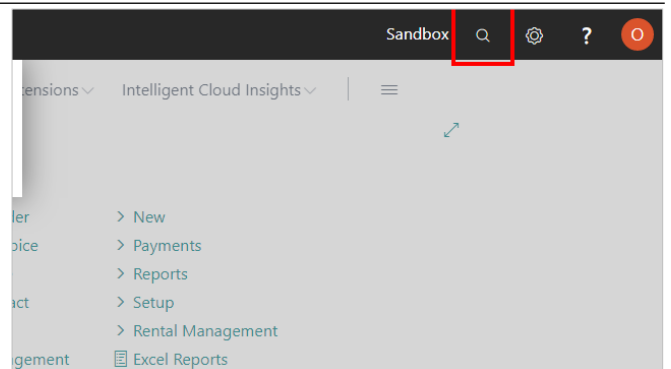
The following demonstrates how to link units manually.

Click on the link **Tell me what you want to do.**
Quickly access actions, pages, reports, documentation, and apps and consulting services.



A software interface is shown with a search bar highlighted in a red box. The search bar contains the text 'Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.' Below the search bar is a list of items including 'New', 'Payments', 'Reports', 'Setup', 'Rental Management', and 'Excel Reports'.

Enter the text **Service Units**.



The same software interface is shown, but the search bar is now empty and highlighted in a red box. The list of items below the search bar remains the same.

Click on **Service Units Administration** ☐

g item
el Chair
ld

Open the list of service units.

Service Units
Open the list of service units.

Service Units
Open the list of service units.

Go to Pages and Tasks

> Service Units Administra

> Service Unit Meters Lists

> Service Unit Usage List Lists

Go to Reports and Analysis

Click on the link in cell **Service Unit No.** with the value **SU00004**

Search + New Manage Open in

Service Unit No. ↑	Description
SU00001	2015 NISSAN Titan
SU00002	2016 NISSAN Titan
SU00003	2015 NISSAN Frontier
SU00004	2016 NISSAN Frontier
SU00005	Open record "SU00004" rd F150
SU00006	2016 Ford F150
SU00007	2017 Bobcat S70 Skid-Steer ..
SU00008	2017 Bobcat S450 Skid-Steer.

Click on the action toggle **edit/view**

UNIT CARD | WORK DATE: 4/6/2020

SU00004

Make changes on the page.

ions Navigate

neral

Service Unit No.	SU00004	Link Description2	
Description	2016 NISSAN Frontier	Service Status	

Click on the field **Link Type**

2015 N
2016 N
2015 N
2016 N
2015 F
2016 F
2017 B
2017 B
2018 B
2018 B

General

Service Unit No.	SU00004	Link Desc
Description	2016 NISSAN Frontier	Service St
Serial No.		Default M
Link Type		Current M
No.		

Customer

Customer No.	10000	ZIP Code
-------------------	-------	----------



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A new link type called Rental Unit is now available.
Click on the item **Rental Unit** in the list

General

Service Unit No. SU00004 Link Desc

Description 2016 NISSAN Frontier Service St

Serial No. Default M

Link Type Rental Unit Current M

No.

Customer Rental Unit

Customer No. 10000 ZIP Code

Customer Name Adatum Corporation Contact

Click on the lookup button **No.**

Service Unit No. SU00004 Link Description2

Description 2016 NISSAN Frontier Service Status

No. Default Meter Code

Type Rental Unit Current Meter Reading

No. Look up value

Customer

Customer No. 10000 ZIP Code 31772

Customer Name Adatum Corporation Contact Robert Town

Select the Rental Unit you want to link to the selected Service Unit.

Click on the link in cell **No.** with the value **SRU00100**

No.

Customer

Customer No. SRU00001 Power Shovel - End/Start EN

Customer Name SRU00002 Portable Generator - Opt-Pro SC

Address SRU00004 Bobcat - Hybrid Hourly 2H

Address 2 SRU00100 2016 Nissan Frontier MU3 PE

City Atlanta Internal Locat

State GA

If the selected Rental Unit requires Metered Usage, you will be given the option to create a matching Service Meter on the new Service Unit and link it with the Metered Usage of the Rental Unit.

Link Type Rental Unit Current Meter Reading

No.

Customer

Customer No.

Customer Name Atlanta Internal Locat

Address GA

Address 2 Atlanta Internal Location Note

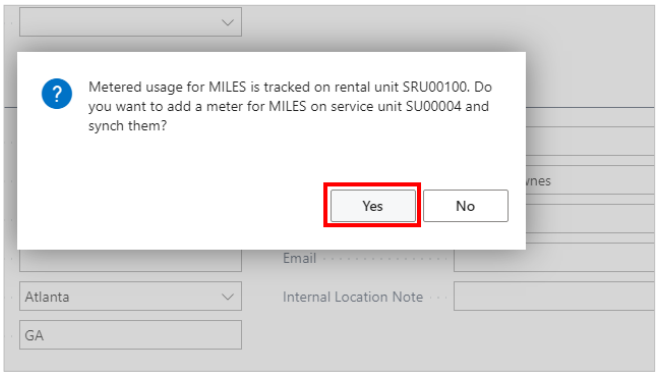
City GA

State Atlanta Internal Location Note

Metered usage for MILES is tracked on rental unit SRU00100. Do you want to add a meter for MILES on service unit SU00004 and synch them?

Yes No

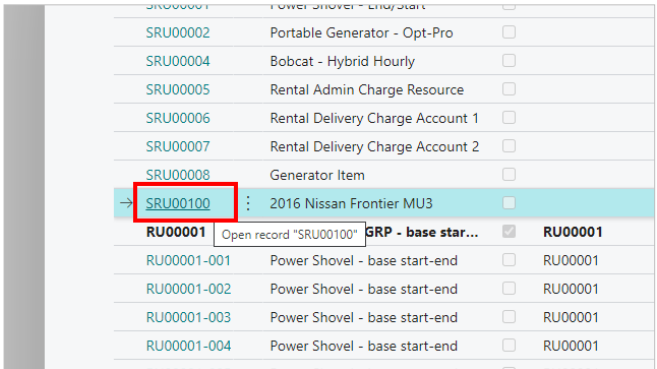
Click on the button **Yes**



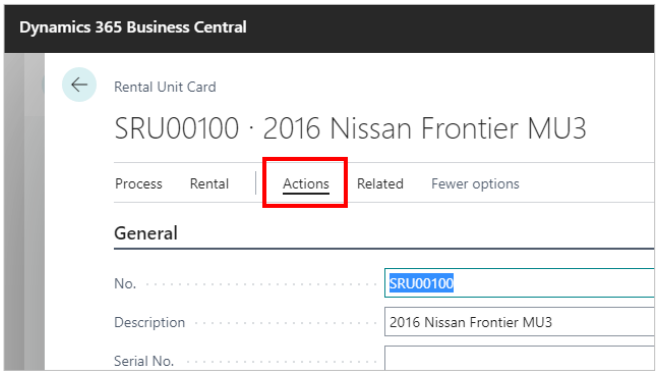
2.1.4. How to Copy Units

The following demonstrates how to link units while copying a rental unit.

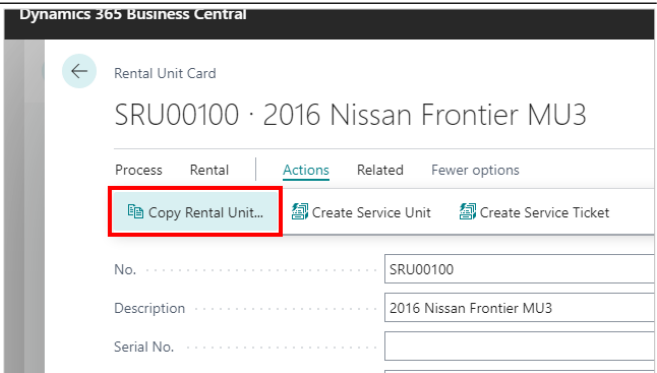
Click on the link in cell **No.** with the value **SRU00100**



Click on the navigation menu item popup **Actions**



Click on the navigation menu item **Copy Rental Unit...**





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Click on the field **First RU No.**

The screenshot shows the 'Options' section of the RUXRMSM Connector Help. The 'First RU No.' field is highlighted with a red box. The 'Copy from RU No.' field is set to 'SRU00100'. The 'No. of Copies' field is set to '1'. The 'Use RU No. Series' toggle is turned on. The 'Create Fixed Asset' toggle is turned on. The 'Fixed Asset Templates' field is empty. The 'Create Service Unit' toggle is turned on.

Enter the text **SRU00100-999**.

The screenshot shows the 'Options' section of the RUXRMSM Connector Help. The 'First RU No.' field is highlighted with a red box and contains the text 'SRU00100-999'. The 'Copy from RU No.' field is set to 'SRU00100'. The 'No. of Copies' field is set to '1'. The 'Use RU No. Series' toggle is turned on. The 'Create Fixed Asset' toggle is turned on. The 'Fixed Asset Templates' field is empty. The 'Create Service Unit' toggle is turned on.

The Create Service Unit option can be used to create and link a new service unit to the copied rental unit.

The screenshot shows the 'Options' section of the RUXRMSM Connector Help. The 'Create Service Unit' toggle is highlighted with a red box. The 'First RU No.' field is set to 'SRU00100-999'. The 'No. of Copies' field is set to '1'. The 'Use RU No. Series' toggle is turned on. The 'Create Fixed Asset' toggle is turned on. The 'Fixed Asset Templates' field is empty. The 'Customer No.' field is empty. The 'Maintenance Group Code' field is empty. The 'Advanced' section is expanded.

Click on the toggle field

The screenshot shows the 'Options' section of the RUXRMSM Connector Help. The 'Create Service Unit' toggle is highlighted with a red box and is turned on. The 'First RU No.' field is set to 'SRU00100-999'. The 'No. of Copies' field is set to '1'. The 'Use RU No. Series' toggle is turned on. The 'Create Fixed Asset' toggle is turned on. The 'Fixed Asset Templates' field is empty. The 'Customer No.' field is empty. The 'Maintenance Group Code' field is empty. The 'Advanced' section is expanded.



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Click on **Customer No.**

First RU No. SRU00100-999

Use RU No. Series ☐

Create Fixed Asset ☐

Fixed Asset Templates

Create Service Unit ☒

Customer No.

Maintenance Group Code

Advanced >

Click on the lookup button **Customer No.**

SRU00100-999

☐

☐

☒

Attachm
Document

0.00

0.00

0.00

Click on the link in cell **No.** with the value **10000**

Fixed Asset Templates

Create Service Unit ☒

Customer No.

Maintenance Group Code

Advanced >

No. ↑	Name	ZIF
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Reledcloud	31

+ New

Click on **Maintenance Group Code**

Use RU No. Series ☐

Create Fixed Asset ☐

Fixed Asset Templates

Create Service Unit ☒

Customer No. 10000

Maintenance Group Code

Advanced >

OK



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Click on the lookup button **Maintenance Group Code**

Review or update the value for Maintenance Group Code

Click on the link in cell **Group Code** with the value **LIGHTTRUCK**

Group Code ↑ Description
→ LIGHTTRUCK Light Truck
SKIDSTEER Skid Steer
+ New

Click on the button **OK**

OK Cancel

Click on the button **OK**

OK Cancel



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If the unit being copied has Metered Usage enabled, a prompt to create and synch a new service unit meter will appear.

Search Description 2016 NISSAN FRONTIER

Inactive ☐

Sales Price

Metered usage for MILES is tracked on rental unit SRU00100-999. Do you want to add a meter for MILES on service unit SRU00100-999 and synch them?

Yes No

Click on the button **Yes**

Metered usage for MILES is tracked on rental unit SRU00100-999. Do you want to add a meter for MILES on service unit SRU00100-999 and synch them?

Yes No

Group Qty. To Rent

Group Qty. On Rent

Group Qty. To Return

Click on the back button

Dynamics 365 Business Central

Rental Unit Card

SRU00100 · 2016 Nissan Frontier MU3

Process Rental Actions Related Fewer options

General

No. SRU00100

Description 2016 Nissan Frontier MU3

Serial No.

Click on the link in cell **No.** with the value **SRU00100-999**

SRU00002	Portable Generator - Open...	<input type="checkbox"/>
SRU00004	Bobcat - Hybrid Hourly	<input type="checkbox"/>
SRU00005	Rental Admin Charge Resource	<input type="checkbox"/>
SRU00006	Rental Delivery Charge Account 1	<input type="checkbox"/>
SRU00007	Rental Delivery Charge Account 2	<input type="checkbox"/>
SRU00008	Generator Item	<input type="checkbox"/>
→ SRU00100	2016 Nissan Frontier MU3	<input type="checkbox"/>
SRU00100-999	2016 Nissan Frontier MU3	<input type="checkbox"/>
RU00001	Open record "SRU00100-999" - base star...	<input checked="" type="checkbox"/> RU00001
RU00001-001	Power Shovel - base start-end	<input type="checkbox"/> RU00001
RU00001-002	Power Shovel - base start-end	<input type="checkbox"/> RU00001
RU00001-003	Power Shovel - base start-end	<input type="checkbox"/> RU00001
RU00001-004	Power Shovel - base start-end	<input type="checkbox"/> RU00001



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Notice that the rental unit has been copied, and is already linked to the new service unit that was created.

SRU00100-999 · 2016 Nissan Frontier MU3

Process Rental Actions Related Fewer options

General

No. SRU00100-999

Description 2016 Nissan Frontier MU3

Serial No.

Location Code

Temporary Location

Click on the field **Service Unit No.**

SRU00100-999

Link Code

Synch Service

Notice that the service unit contains information matching the linked rental unit, as well as the customer and maintenance group code that were specified during the copy.

SRU00100-999

Actions Related

General

Service Unit No. SRU00100-999

Description 2016 Nissan Frontier MU3

Serial No.

Link Type Rental Unit

No. SRU00100-999

3. Connector Metered Usage

3.1. How to Track Metered Usage

3.1.1. Overview

Some Rental Units will use Metered Usage as a way to bill the customer and track usage information. By linking a Rental Unit with a Service Unit the Metered Usage reading can be synchronised with a matching Service Meter. This allows usage to be easily tracked across both unit types, and allows Metered Usage on a contract to be used to trigger Planned Maintenance functions in ODT Service.

3.1.2. How to configure synced meters

Ensure that the Synch Service Meter toggle is enabled in your linked Rental Units.

Link

Link Type Fixed Asset

Service

Service Unit No. SU00015

Synch Service Meter ☒

If the Rental and Service units have meters with different readings, a message will appear asking which one to use for synching, and both meters will be updated to that reading.

On Rent No

On Rent Doc. No. -

Choose which meter you want to use as the master:

☐ Rental Meter: 1000

☒ Service Meter: 4300

OK **Cancel**

New Meter Reading

The option Rental Unit-Auto Service Unit No. Series will allow you to change the number series that is used when Service Units are created from a Rental unit or when selling a Fixed Asset

Show Journal and Post Manually Item Expense ☒

Consolidate Delivery/Return Inspections ☒

Update Rental Unit Status on creation of Delivery I... ..

Update Rental Unit Status on creation of Return Ins... ..

Del/Rtn Inspection Customer Rental Contract Cust

Rental Unit-Auto Service Unit No. Series Linked Entity No.

Allow Active Rentals Metered Usage ☒

In Service Management Setup, the Allow Active Rentals Metered Usage option will allow you to update metered usage from Service Units and Service Tickets when the linked Rental Unit is on rent.

Consolidate Delivery/Return Inspections ☒

Update Rental Unit Status on creation of Delivery I... ..

Update Rental Unit Status on creation of Return Ins... ..

Del/Rtn Inspection Customer Rental Contract Cust

Rental Unit-Auto Service Unit No. Series Linked Entity No.

Allow Active Rentals Metered Usage ☒

Work Start Time 8:00:00 AM



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Click on the toggle field **Allow Active Rentals Metered Usage**

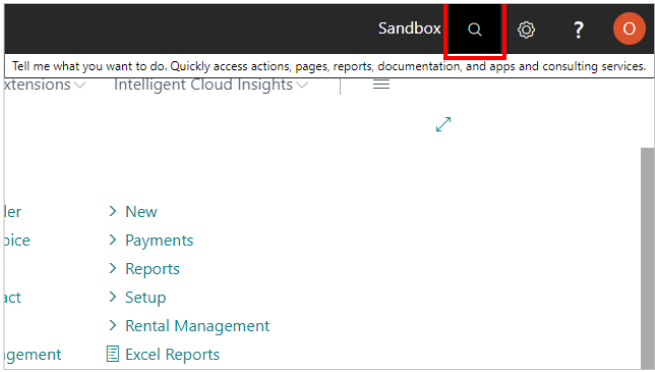
Associate Delivery/Return Inspections	
Associate Rental Unit Status on creation of Delivery I...	
Associate Rental Unit Status on creation of Return Ins...	
Return Inspection Customer	Rental Contract Customer
Rental Unit-Auto Service Unit No. Series	Linked Entity No.
Allow Active Rentals Metered Usage	<input checked="" type="checkbox"/>
Link Start Time	8:00:00 AM

3.1.3. **How to synchronise Metered Usage and Service Meters**

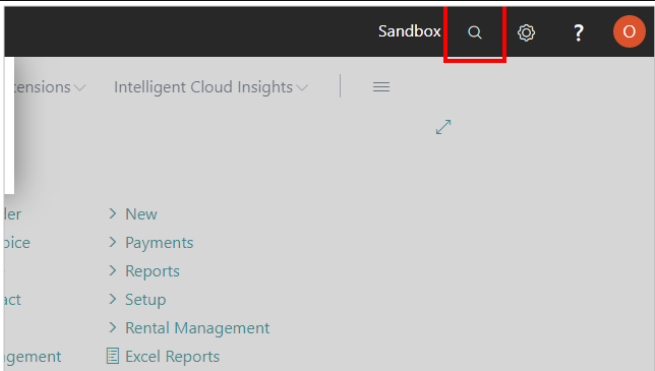
A Rental Unit Metered Usage and a Service Unit Service Meter can be synchronised in two ways. The two meters can be synchronised automatically if a Rental Unit with Metered Usage enabled is linked to a Service Unit. The system will create a new Service Meter and synchronise it with Metered Usage. This process is demonstrated in the help section How to Link a Rental Unit and a Service Unit.

If Metered Usage was not enabled, or if the user said No when prompted during the linked unit setup, then the meters must be synchronised manually. The following will demonstrate this process, using a Service Unit that already has a Service Meter and has already been linked to a Rental Unit.

Click on the link **Tell me what you want to do.**
Quickly access actions, pages, reports, documentation, and apps and consulting services.



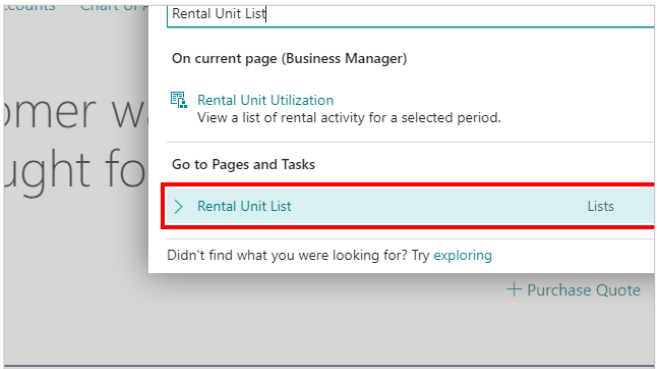
Enter **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services..**






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Click on **Rental Unit List Lists** 



Rental Unit List

On current page (Business Manager)

 Rental Unit Utilization
View a list of rental activity for a selected period.

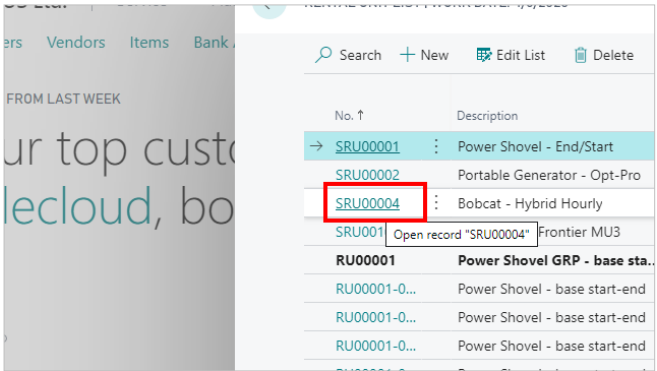
Go to Pages and Tasks

> Rental Unit List Lists

Didn't find what you were looking for? Try [exploring](#)

[+ Purchase Quote](#)

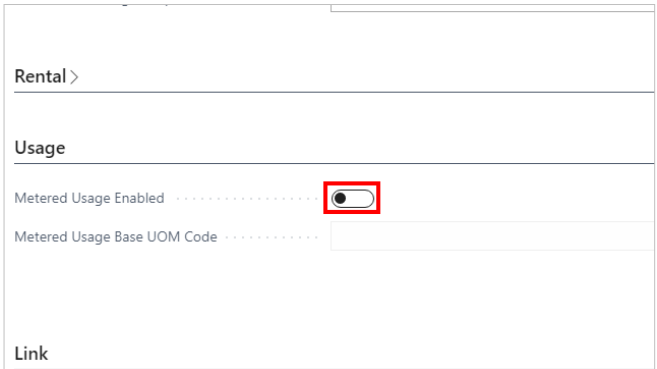
Click on the link in cell **No.** with the value **SRU00004**



No. ↑	Description
→ SRU00001	Power Shovel - End/Start
SRU00002	Portable Generator - Opt-Pro
SRU00004	Bobcat - Hybrid Hourly
SRU001	Open record "SRU00004" Frontier MU3
RU00001	Power Shovel GRP - base sta..
RU00001-0...	Power Shovel - base start-end
RU00001-0...	Power Shovel - base start-end
RU00001-0...	Power Shovel - base start-end


First, Metered Usage must be enabled for the selected Rental Unit.

Click on the toggle field **Metered Usage Enabled**



Rental >

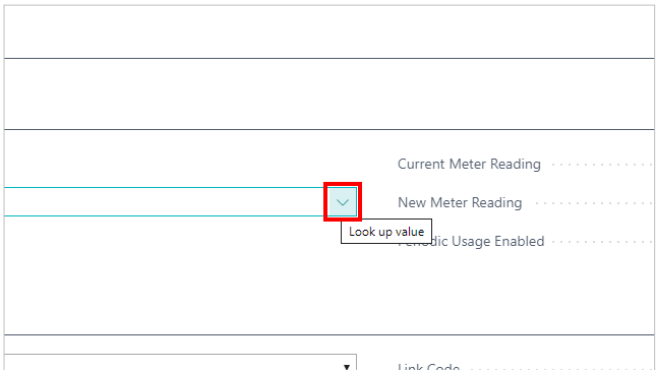
Usage

Metered Usage Enabled 


Metered Usage Base UOM Code

Link

Click on the lookup button **Metered Usage Base UOM Code**



Current Meter Reading

New Meter Reading 

Look up value

Metered Usage Enabled

Link Code



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Click on the link in cell **Code** with the value **HOURL**

Usage Enabled ☒

Usage Base UOM Code

Code ↑

CAN

DAY

HOURL

KG

KM

MILES

+ New

Unit No. SU00007

Next, the option to synchronise meters must be enabled.

Click on the toggle field **Synch Service Meter**

Link

Link Type

Service

Service Unit No. SU00007

Synch Service Meter ☐

Click on the lookup button **Synch Service Meter**

Look up value

Select the Service Meter you want to synchronise with Metered Usage. Please note that the Unit of Measurement for both the Service Meter and Metered Usage must be identical. In this example, they are both set to Hours.

Click on the link in cell **Meter Code** with the value **HOURL**

RENTAL UNIT CARD | WORK DATE: 4/6/2020

SRU00004 · Bob

Process Rental Actions Naviga

No. Description Serial No. Location Code

Meter Code Description

HOURL : HOURL Meter

Select record "HOURL"

3.1.4. How to update synchronised meters

The following demonstrates how to update synchronised meters.



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Note that the Current Meter Reading field is 0.

Click on the field **New Meter Reading**

Enter the text **10**. Press the **Enter** key.

You may change the date if you wish. For this example we will use 4/6/2020



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Click on the field **Usage Transaction Description**

EDIT - RENTAL USAGE TRANSACTION DETAILS

Entry Type Adjustment

Usage Transaction Date 4/6/2020

Usage Transaction Descript... * [Red Box]

Enter the text **First Reading**.

EDIT - RENTAL USAGE TRANSACTION DETAILS

Entry Type Adjustment

Usage Transaction Date 4/6/2020

Usage Transaction Descript... * First Reading [Red Box]

Click on the button **OK**

EDIT - RENTAL USAGE TRANSACTION DETAILS

Usage Transaction Descript... First Reading

OK Cancel

Notice the Current Meter Reading field is now 10.

Current Meter Reading

10.00



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The Service Unit No. field can be used as a link to the corresponding Service Unit.

Link

Link Type

Service

Service Unit No. SU00007

Synch Service Meter

Click on the field **Service Unit No.**

Service Unit No. SU00007

Open details for "Service Unit No." "SU00007"

Click on the navigation menu item popup **Navigate**

Navigation menu item popup **Navigate**

Service Unit No. SU00007

Description 2017 Bobcat S70 Skid-Steer L...

Click on the navigation menu item **Service Unit Meters**

Navigation menu item **Service Unit Meters**

Service Unit No. SU00007

Description 2017 Bobcat S70 Skid-Steer L...



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Notice there is a meter matching the one specified on the Rental Unit Card.

Actions	Search	New	Edit List	Delete	Open in Excel
General	Meter Code	Description	Maintenance Sub-Group Code	Unit of Measure	
Service Unit	→ HOUR	: HOUR Meter			HOUR
Description					
Serial Number					
Link Type					
No.					
Custom					

Notice the Current Meter Reading matches the reading from the Rental Unit.

ers	Delete	Open in Excel	Actions	Fewer options	
Maintenance Sub-Group Code	Unit of Measure	Def...	Current Meter Reading	Expected Usage per Day	
HOUR			10.00	6.00	

Click on the link **Actions**

2020	Unit Meters	Edit List	Delete	Open in Excel	Actions	Fewer options	
Description	Maintenance Sub-Group Code	Unit of Measure	Def...	Current Meter Reading	Expected Usage per Day		
HOUR Meter		HOUR		10.00	6.00		

Click on the navigation menu item **Update Meter Reading**

←

...ICE UN

←

SU00007 | WORK DATE: 4/6/2020

SU00007

Service Unit Meters

Actions

🔍

Search

+

New

📄

Edit List

🗑️

Delete

📊

Open in Excel

General

Show Meter Reading

Update Meter Reading

Update Meter Reading

Service Unit

Meter Code

Description

Code

Measure

Description

Serial Number

→

HOUR

:

HOUR Meter

HOUR



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Click on the cell **Activity Date Time** with the value **2/19/2020 11:00 AM**

No.	Meter Code	Activity Type	Activity Date Time	Last Meter Reading	New Meter Reading
	HOUR	Adjustment	2/19/2020 11:00 AM	10.00	

Ensure that the date is set correctly. A meter update cannot use a date that is earlier than the most recent update.
Enter the text **4/6/2020 11:00PM**. Press the **Enter** key.

No.	Meter Code	Activity Type	Activity Date Time	Last Meter Reading	New Meter Reading
	HOUR	Adjustment	2/19/2020 11:00 AM	10.00	

Click on the cell **New Meter Reading** with the value **10.00**

Activity Date Time	Last Meter Reading	New Meter Reading	Unit of Measure
4/6/2020 11:00 PM	10.00	10.00	HOUR

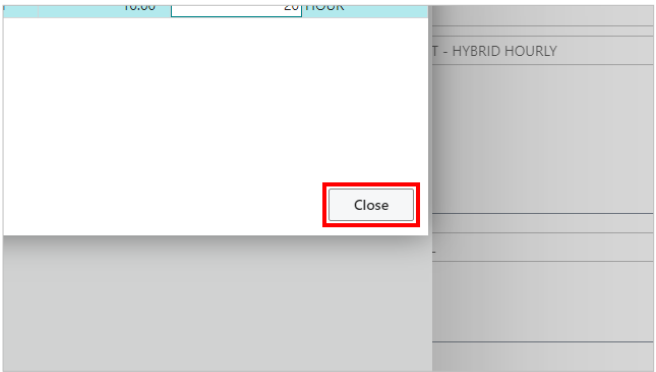
Enter the text **20**.

Activity Date Time	Last Meter Reading	New Meter Reading	Unit of Measure
4/6/2020 11:00 PM	10.00	20	HOUR

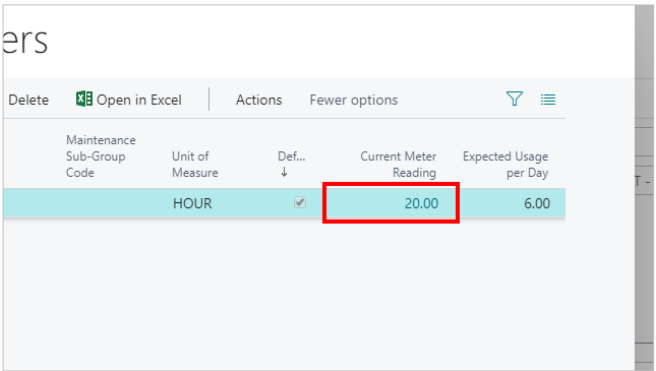


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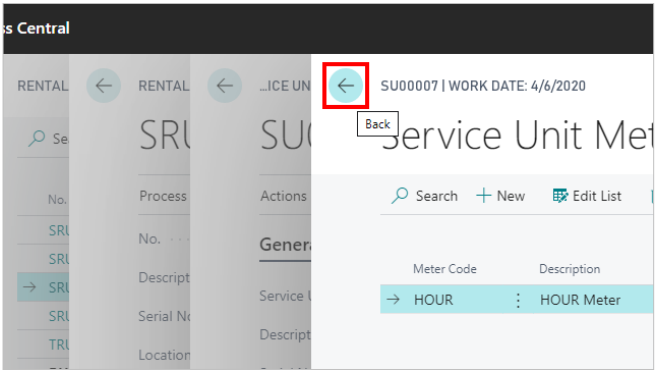
Click on the button **Close**



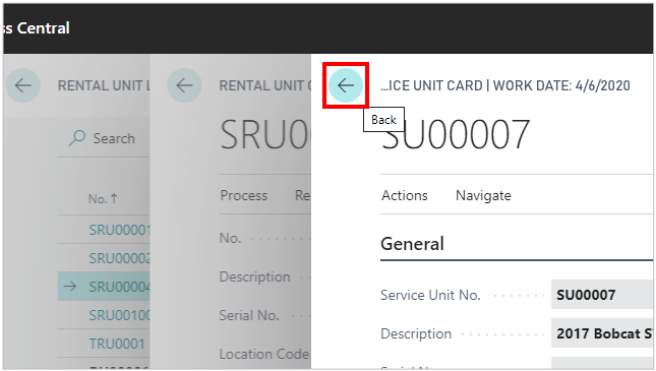
Notice that Current Meter Reading is now 20.



Click on the back button



Click on the back button





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Notice that Current Meter Reading has the same reading as the Service Unit Meter.

A screenshot of a software interface showing a form with several input fields. The field for 'Current Meter Reading' is highlighted with a red rectangular box and contains the value '20.00'. Below it, the 'Service Unit Meter' field also contains the value '20.00'. There is a toggle switch below these fields.

4. Connector Processing

4.1. How to Create Service Tickets from Rental Contracts

4.1.1. Overview

The ODT RMSM Connector allows for users working with Rental Contracts to create Service Tickets for linked units without having to leave the contract. In addition to being more convenient, this also allows you to easily see if a unit is undergoing maintenance.

4.1.2. How to create a Service Ticket in a Rental Contract

The following demonstrates creating a Service Ticket from a Rental Contract.

Click on the navigation menu item **Rental Contract**

A screenshot of a software interface showing a navigation menu. The 'Rental Contract' option is highlighted with a red rectangular box. The menu is titled 'ACTIONS' and lists various options: Service Ticket Quote, Service Ticket, Service Unit, Service Template, Sales Quote, Sales Order, Sales Invoice, Purchase Quote, Purchase Order, Purchase Invoice, Rental Quote, Rental Contract, Rental Unit, Service Management, Service, and Planned Maintenance. There are also links for 'New', 'Payments', 'Reports', 'Setup', and 'Excel Report'.

Setup the Rental Contract as you would normally.

Click on the lookup button **Sell-to Customer Name**

A screenshot of a software interface showing a form with several input fields. The 'Look up value' button is highlighted with a red rectangular box. The form includes fields for 'External Document No.', 'Rental Terms Code', 'Deposit Amount', 'Contract Total', and 'Outstanding Amount'.



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Click on the link in cell **No.** with the value **10000**

Process Contract Rental More options

General

Bill-to Customer Name

Quote No.

Posting Date → 10000 Adatum Corporation 31

Order Date 200 Select record "10000"rch 61

Document Date 30000 School of Fine Art 37

40000 Alpine Ski House 31

50000 Relecloud 31

Rental Lines Manage Line Function + New

Click on the cell **Rental Unit No.**

Document Date 4/6/2020

Rental Lines Manage Line Functions Fewer options

Rental Unit No. Standard Text Code Description

→ [] Look up value

Sales Lines Manage More options

Click on the lookup button in the cell **Rental Unit No.**

Document Date 4/6/2020

Rental Lines Manage Line Functions Fewer options

Rental Unit No. Standard Text Code Description

→ [...] Look up value

Sales Lines Manage More options

Click on the link in cell **No.** with the value **SRU00004**

Rental Contract

Process Contract Rental More

General

Sell-to Customer Name

Quote No.

Posting Date

Order Date

Document Date

RENTAL UNIT LIST

No. ↑	Description
SRU00001	Power Shovel - End/Start
SRU00002	Portable Generator - Opt-Pro
SRU00004	Bobcat - Hybrid Hourly
SRU00100	2016 Nissan Frontier MU3
TRU0001	Bobcat - Hybrid Hourly
RU00001	Power Shovel GRP - base sta..
RU00001-0...	Power Shovel - base start-end
RU00001-0...	Power Shovel - base start-end

Once your contract is setup, select the Rental Unit you want to create a ticket for.



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Click on the navigation menu item popup **Functions**

Quote No.

Posting Date 4/6/2020

Order Date 4/6/2020

Document Date 4/6/2020

Rental Lines | Manage | Line | **Functions** | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ SRU00004 ...		Bobcat - Hybrid Hourly	2HR

Click on the navigation menu item **Create Service Ticket**

Contract Total

Outstanding Amount

Phase Order | Rental Periodic Usage Calendar | **Create Service Ticket** | View Service Ticket

Create a service ticket for the rental unit

		4/6/2020	4/7/2020	25.00	0.00

A new Service Ticket will be created using information from the Service Unit linked to the selected Rental Unit.

WORK DATE: 4/6/2020

Contract

Rental | More

me

Manage | Process | Report | More options

EDIT - SERVICE TICKET - ST00001 - SERVICE TICKET #ST00001 - ADATUM C

General

Customer No. 10000

Customer Name Adatum Corporation

Description Service Ticket #ST00001 - Adatum Cor

Order Date 4/6/2020

Service Date 4/6/2020

Click on the button **Close**

Discount % | Currency Code | Qty

0 | |

Type	No.	Description
view)		

Close



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RUXRMSM Connector Help	28/48

Notice that the Service Ticket No. field now shows the ticket that the selected unit is part of.

Line Discount %	Allow Zero Usa...	Ret... Day Billa...	Partial Return Date	Service Ticket No.
0	<input type="checkbox"/>	<input checked="" type="checkbox"/>		ST00001

Click on the link **Functions**

Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code
→ SRU00004	0.00	0.00		RENTAL

Click on the navigation menu item **View Service Ticket**

This option will let you view the ticket that is assigned to the selected Rental Unit.

Line Discount %	Allow Zero Usa...	Ret... Day Billa...	Partial Return Date	Service Ticket No.
0	<input type="checkbox"/>	<input checked="" type="checkbox"/>		ST00001

4.2. How to use Service Ticket Chargeback

4.2.1. Overview

When working with Rental Units it sometimes becomes necessary to perform maintenance during the rental process. When a Rental unit and Service unit are linked together using the ODT RMSM Connector, any service performed on the unit can be charged to a rental contract instead of a separate invoice. This provides a more convenient way to perform maintenance when working with rental units.

4.2.2. How to use Service Ticket Chargeback

The following demonstrates how to charge service lines to a rental contract.



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Click on the navigation menu item **Rental Contract**

Rental Terms Rental Units Rental Packages

ACTIONS

+ Service Ticket Quote	+ Purchase Order	> New
+ Service Ticket	+ Purchase Invoice	> Payments
+ Service Unit	+ Rental Quote	> Reports
+ Service Template	+ Rental Contract	> Setup
+ Sales Quote	+ Rental Unit	> CAL Test Tool
+ Sales Order	> Service Management	> Rental Management
+ Sales Invoice	> Service	> Excel Report
+ Purchase Quote	> Planned Maintenance	

Click on the lookup button **Sell-to Customer Name**

External Document No.

Look up value

Deposit Amount

Contract Total

Outstanding Amount

Click on the link in cell **No.** with the value **10000**

Process Contract Rental More options

General

Sell-to Customer Name

Quote No.

Posting Date

Order Date

Document Date

No.	Name	ZIP
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

Rental Lines Manage Line Function + New

Click on the cell **Rental Unit No.**

Document Date

Rental Lines Manage Line Functions Fewer options

Rental Unit No.	Standard Text Code	Description
<input type="text"/>		

Sales Lines Manage More options



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Click on the lookup button in the cell **Rental Unit No.**

Document Date 5/5/2020

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description
→ [lookup button] ...		

Sales Lines | Manage | More options

Click on the link in cell **No.** with the value **SRU00004**

Rental Contract

Process Contract Rental More

General

Sell-to Customer Name

Quote No.

Posting Date

Order Date

Document Date

RENTAL UNIT LIST

No. ↑	Description
→ SRU00001	Power Shovel - End/Start
SRU00002	Portable Generator - Opt-Pro
SRU00004	Bobcat - Hybrid Hourly
SRU0010	Select record "SRU00004" frontier MU3
TRU0001	Bobcat - Hybrid Hourly
RU00001	Power Shovel GRP - base sta..
RU00001-0...	Power Shovel - base start-end
RU00001-0...	Power Shovel - base start-end

Click on the link **Functions**

Quote No.

Posting Date 5/5/2020

Order Date 5/5/2020

Document Date 5/5/2020

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ SRU00004 ...		Bobcat - Hybrid Hourly	2HR

Click on the navigation menu item **Create Service Ticket**

Contract Total

Outstanding Amount

Phase Order Rental Periodic Usage Calendar Create Service Ticket View Service Ticket

Create a service ticket for the rental unit c

Start Date	End Date	Amount	Balance
5/5/2020	5/6/2020	25.00	0.00



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The Rental Contract No. field displays which contract this ticket is assigned to, and is filled in automatically.

This screenshot shows a 'Service Ticket' form. The 'Rental Contract No.' field is highlighted with a red rectangle and contains the value 'RC00003'. Other visible fields include 'Service Ticket Type', 'Assigned Technician', 'Default Service Unit No.' (SU00007), and a 'Chargeback' toggle switch.

The Chargeback field must be enabled to allow for service lines to be billed to a contract.

This screenshot shows the same 'Service Ticket' form, but the 'Chargeback' toggle switch is highlighted with a red rectangle and is currently turned on. The 'Rental Contract No.' field still shows 'RC00003'.

Click on the toggle field **Chargeback**

This screenshot is identical to the previous one, showing the 'Chargeback' toggle switch highlighted with a red rectangle and turned on.

Click on the navigation menu item popup **Process**

This screenshot shows a navigation menu with three items: 'Manage', 'Process', and 'Report'. The 'Process' item is highlighted with a red rectangle. Below the menu, a 'General' section displays contract details: Customer No. 10000, Customer Name Adatum Corporation, Description Service Ticket #ST00005 - Ada, and Order Date 5/5/2020.



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Click on the navigation menu item **Add Service Template**

The screenshot shows the 'Rental Contract' form with the 'Process' tab selected. The 'Add Service Template' button is highlighted with a red box. The form includes fields for Customer No. (10000), Customer Name (Adatum Corporation), Description (Service Ticket #ST00005 - Ada), and Order Date (5/5/2020).

Click on the link in cell **Template No.** with the value **OILCHANGE-SS**

The screenshot shows the 'SERVICE TEMPLATES' table. The 'Template No.' column contains the value 'OILCHANGE-SS', which is highlighted with a red box. The table also shows 'Template Type' (All) and 'Description' (Oil Char).

Click on the navigation menu item popup **Process**

The screenshot shows the 'Rental Contract' form with the 'Process' button highlighted with a red box. The form includes fields for Customer No. (10000), Customer Name (Adatum Corporation), Description (Service Ticket #ST00005 - Ada), and Order Date (5/5/2020).

Click on the navigation menu item **Confirm Actuals**

The screenshot shows the 'Rental Contract' form with the 'Confirm Actuals' button highlighted with a red box. The form includes fields for Customer No. (10000), Customer Name (Adatum Corporation), Description (Service Ticket #ST00005 - Ada), and Order Date (5/5/2020).



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Click on the navigation menu item popup **Post/Print**

The screenshot shows the 'Post/Print' menu item highlighted in a red box. The interface includes a navigation bar with 'Manage', 'Process', 'Prepare', 'Post/Print', 'Job', 'Line', and 'More options'. Below the navigation bar, there is a section for 'EDIT - JOB JOURNALS - KYLE - 0DT\KYLE JOURNAL'. A table lists journal lines with columns for Line Type, Posting Date, Document No., Job No., and Job Task No. The first line is highlighted in blue.

Line Type	Posting Date	Document No.	Job No.	Job Task No.	Type
→ Both Budget	5/5/2020	DOCST00005	ST00005	0020000	Re
Both Budget...	5/5/2020	DOCST00005	ST00005	0020000	It
Both Budget...	5/5/2020	DOCST00005	ST00005	0020000	It
Both Budget...	5/5/2020	DOCST00005	ST00005	0020000	It

Click on the navigation menu item **Post**

The screenshot shows the 'Post' menu item highlighted in a red box. The interface includes a navigation bar with 'Manage', 'Process', 'Prepare', 'Post/Print', 'Job', 'Line', and 'More options'. Below the navigation bar, there is a section for 'Rental Contract'. A table lists journal lines with columns for Line Type, Posting Date, Document No., Job No., and Job Task No. The first line is highlighted in blue.

Line Type	Posting Date	Document No.	Job No.	Job Task No.	Type
→ Both Budget	5/5/2020	DOCST00005	ST00005	0020000	Re
Both Budget...	5/5/2020	DOCST00005	ST00005	0020000	It
Both Budget...	5/5/2020	DOCST00005	ST00005	0020000	It
Both Budget...	5/5/2020	DOCST00005	ST00005	0020000	It

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Do you want to post the journal lines?'. The 'Yes' button is highlighted in a red box. The background shows the 'Rental Contract' section.

Click on the button **OK**

The screenshot shows a success message dialog box with the text 'The journal lines were successfully posted.' The 'OK' button is highlighted in a red box. The background shows the 'Rental Contract' section.



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Click on the button **Close**

A screenshot of a software interface showing a dialog box with the text "ACCOUNT NAME" and a "Close" button highlighted with a red rectangle. Below the dialog box, a table with columns "Serv...", "Start Date", "End Date", and "Co" is partially visible, showing data for "5/5/2020" and "39".

Click on the navigation menu item popup **Process**

A screenshot of a software interface showing a navigation menu with the "Process" button highlighted with a red rectangle. The menu also includes "Manage", "Report", and "More options". Below the menu, a form titled "General" contains fields for "Customer No." (10000), "Customer Name" (Adatum Corporation), "Description" (Service Ticket #ST00005 - Ada), and "Order Date" (5/5/2020).

Click on the navigation menu item **Chargeback Invoice Lines To Rental**

A screenshot of a software interface showing a navigation menu with the "Chargeback Invoice Lines To Rental" button highlighted with a red rectangle. The menu also includes "Process", "Report", and "More options". Below the menu, a form contains fields for "Customer No." (10000), "Customer Name" (Adatum Corporation), "Service Ticket #ST00005 - Adatum Cor", "Order Date" (5/5/2020), "Service Ticket Type", "Assigned Technician", "Default Service Unit No." (SU0000), and "Chargeback" (checked).

A message will appear notifying you that lines have been moved to the assigned contract.

A screenshot of a software interface showing a message box with the text "4 lines have been added to Rental Contract RC00003." and an "OK" button. The message box is highlighted with a red rectangle. In the background, a table with columns "Units/Lines", "Manage", and "More options" is visible, showing data for "SU00007" and "SU00007".



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Click on the button **OK**

Lines have been added to Rental Contract RC00003.

OK

Click on the button **Close**

Type	No.	Description
Resource	LABOR	Labor - Oil Change
Item	OIL FILTER	Filter, Oil

Close

Notice that the sales lines of the rental contract now contain lines for the service performed.

Type	No.	Description	Loc
Resource	LABOR	Labor - Oil Change	
Item	OILFILTER	Filter, Oil	
Item	OILGASKET	Gasket, Oil	
Item	MOBIL15W30	Mobil 1 5W30	

Since service was performed before shipping, we will now ship and invoice this unit as normal.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 5/5/2020

Rental Contract · RC00003

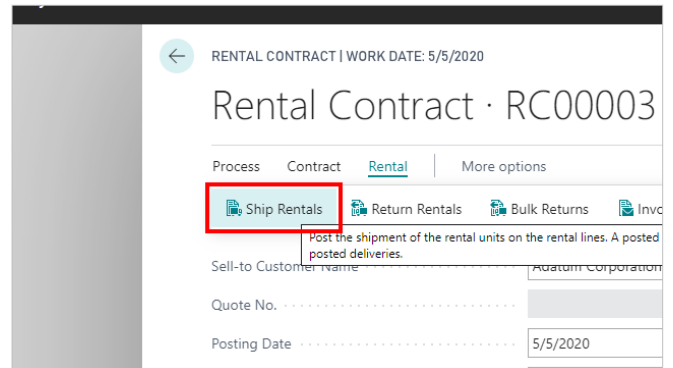
Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Ship Rentals**



RENTAL CONTRACT | WORK DATE: 5/5/2020

Rental Contract · RC000003

Process Contract Rental More options

Ship Rentals Return Rentals Bulk Returns Invo

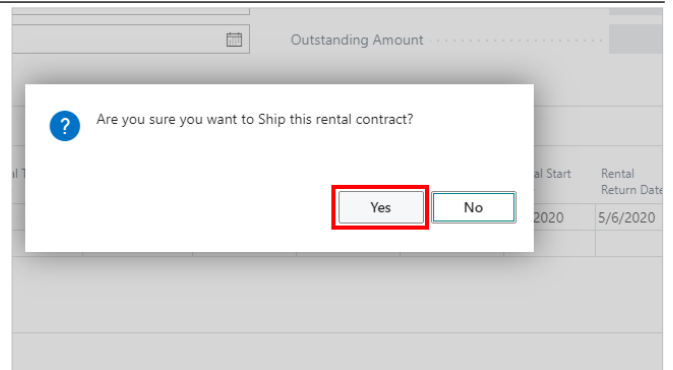
Post the shipment of the rental units on the rental lines. A posted delivery.

Sell-to Customer name Aquatum Corporation

Quote No.

Posting Date 5/5/2020

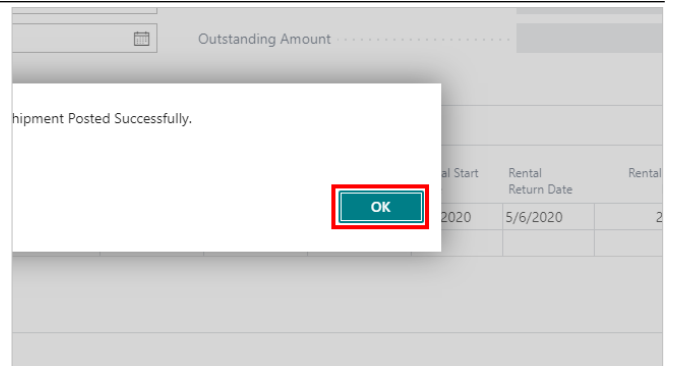
Click on the button **Yes**



Are you sure you want to Ship this rental contract?

Yes No

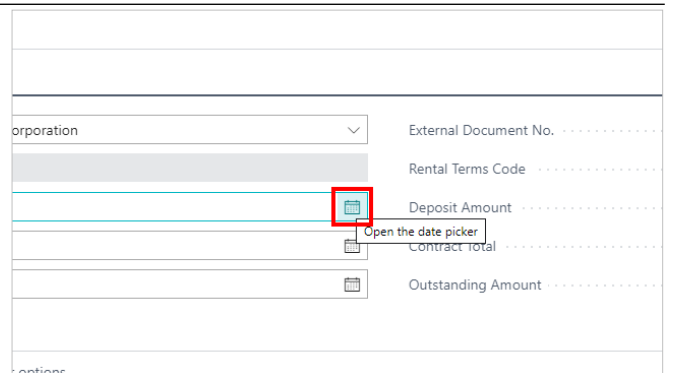
Click on the button **OK**



Shipment Posted Successfully.

OK

Click on the link **Open the date picker**



corporation

External Document No.

Rental Terms Code

Deposit Amount

Contract total

Outstanding Amount

Options.



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Click on a date in the calendar

Customer Name Adatum Corporation

5/5/2020

May 2020

Su	Mo	Tu	We	Th	Fr	Sa
			1	2		
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Manage Line Function

Standard Text Code Description Today Done Rental Quantity Location

Bobcat - Hybrid Hourly 2HR 1

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 5/5/2020

Rental Contract · RC00003

Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Invoice**

CONTRACT | WORK DATE: 5/5/2020

Rental Contract · RC00003

Contract **Rental** More options

Rentals **Invoice**

Customer Name Adatum Corporation

Date 5/6/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

Rental Start	Rental Return Date
2020	5/6/2020



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Click on the button **OK**

Invoice Posted Successfully.

OK

Notice that the Quantity Invoiced field on the sales lines now shows that the lines have been invoiced.

%	Currency Code	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced
0		0	1	0	1
0		0	1	0	1
0		0	1	0	1
0		0	6	0	6

Click on the navigation menu item popup **Functions**

Posting Date: 5/6/2020

Order Date: 5/5/2020

Document Date: 5/6/2020

Rental Lines | Manage | Line | **Functions** | Fewer options

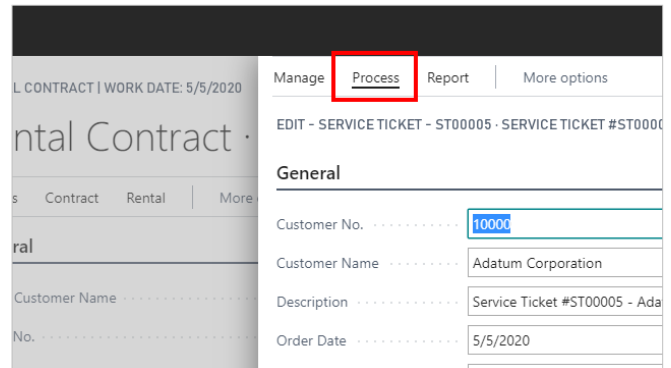
Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ SRU00004	:	Bobcat - Hybrid Hourly	SOPT-T-DAY

Click on the navigation menu item **View Service Ticket**

Periodic Usage Calendar | Create Service Ticket | **View Service Ticket**

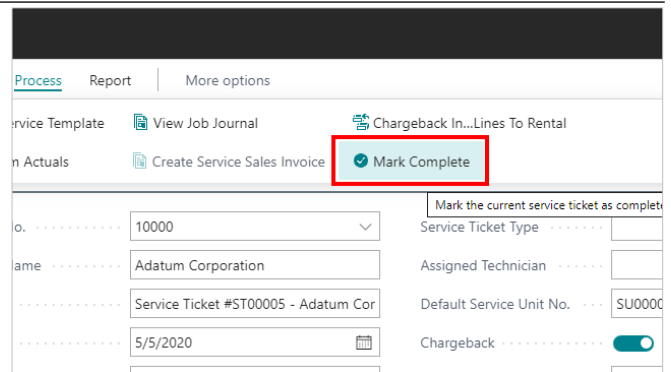
WEEK	5/5/2020	5/6/2020	150.00	3,500.00
------	----------	----------	--------	----------

Click on the navigation menu item popup **Process**



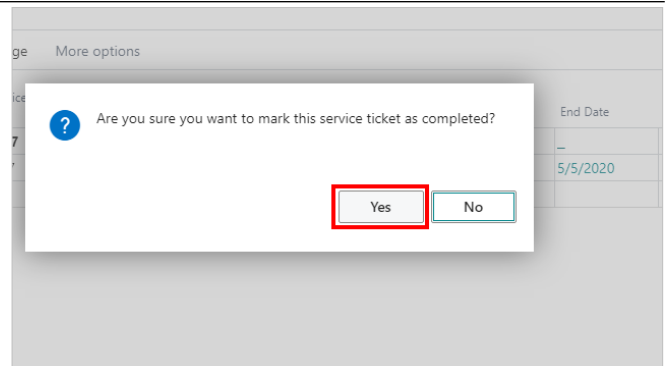
The screenshot shows the 'Process' button highlighted in a red box. The interface includes a top navigation bar with 'Manage', 'Process', 'Report', and 'More options'. Below this, there's a section for 'General' with fields for Customer No. (10000), Customer Name (Adatum Corporation), Description (Service Ticket #ST00005 - Ada), and Order Date (5/5/2020).

Since the service lines have now been invoiced on the contract, the ticket can be marked as complete. Click on the link **Mark the current service ticket as completed.**



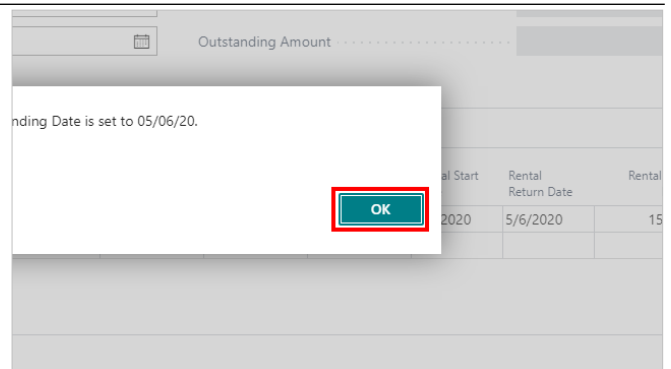
The screenshot shows the 'Mark Complete' button highlighted in a red box. The interface includes a top navigation bar with 'Process', 'Report', and 'More options'. Below this, there's a section for 'Service Template' with fields for Service Ticket Type, Assigned Technician, Default Service Unit No. (SU0000), and Chargeback (checked).

Click on the button **Yes**



The screenshot shows a confirmation dialog box with the text 'Are you sure you want to mark this service ticket as completed?'. The 'Yes' button is highlighted in a red box. The dialog box also includes a 'No' button.

Click on the button **OK**



The screenshot shows an 'OK' button highlighted in a red box. The interface includes a top navigation bar with 'Manage', 'Process', 'Report', and 'More options'. Below this, there's a section for 'Outstanding Amount' with a table showing 'Rental Start', 'Rental Return Date', and 'Rental'.

4.3. How to use Delivery and Return Service

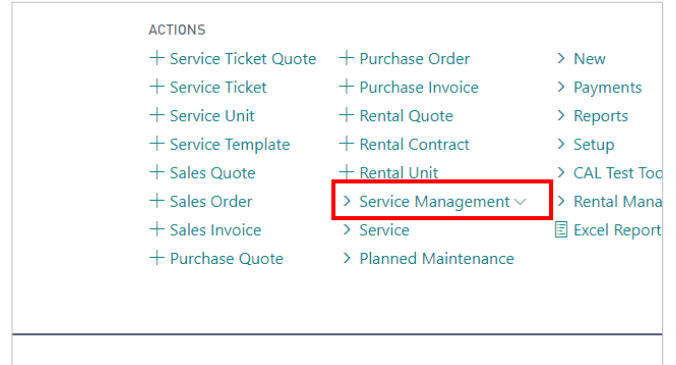
4.3.1. Overview

The ODT RMSM Connector adds two new planned maintenance types for Delivery service and Return service. This allows for the setup of service that will occur when a Rental Unit is delivered or when it is returned.

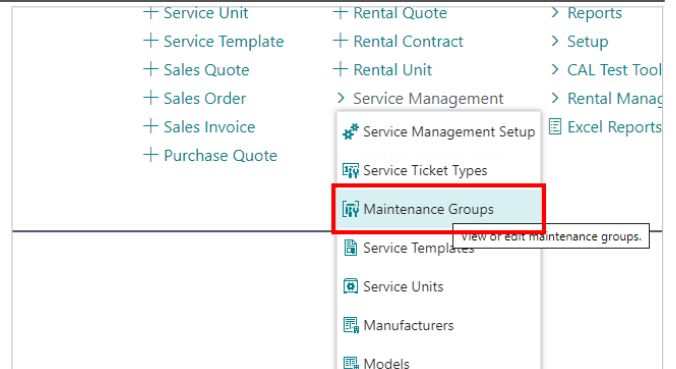
4.3.2. How to set up Delivery/Return service

The following demonstrates the setup of Delivery type Planned Maintenance. The same process can be used to set up Return type Planned Maintenance.

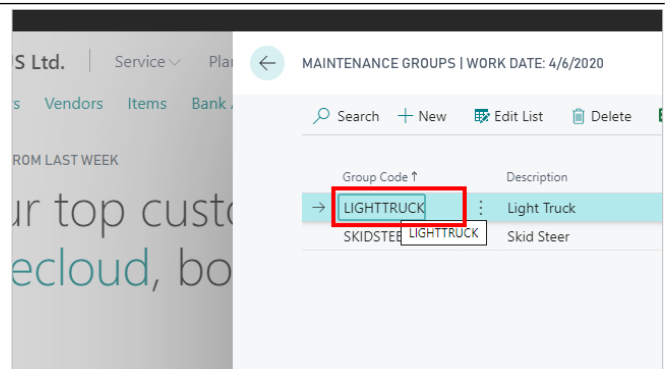
Click on the navigation menu item popup **Service Management**



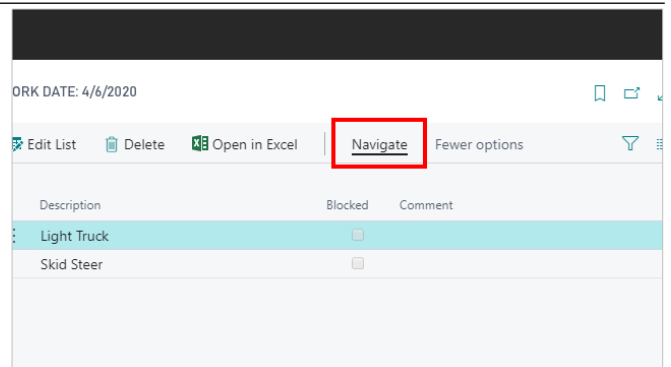
Click on the navigation menu item **Maintenance Groups**



Click on the cell **Group Code** with the value **LIGHTTRUCK**



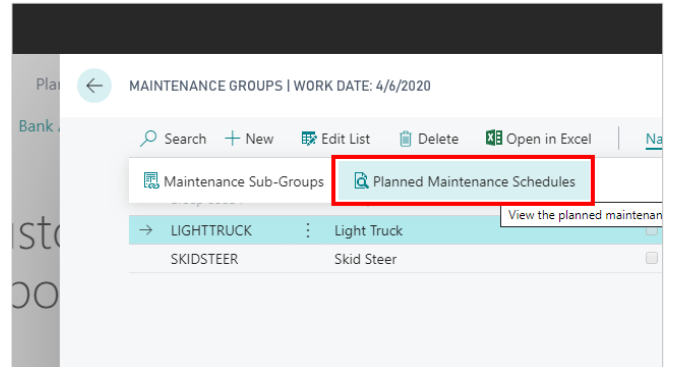
Click on the navigation menu item popup **Navigate**



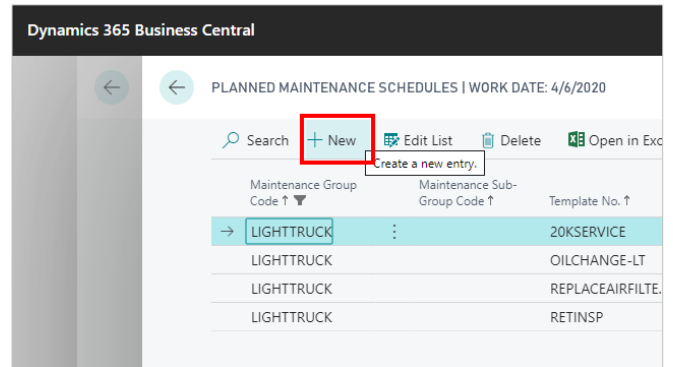


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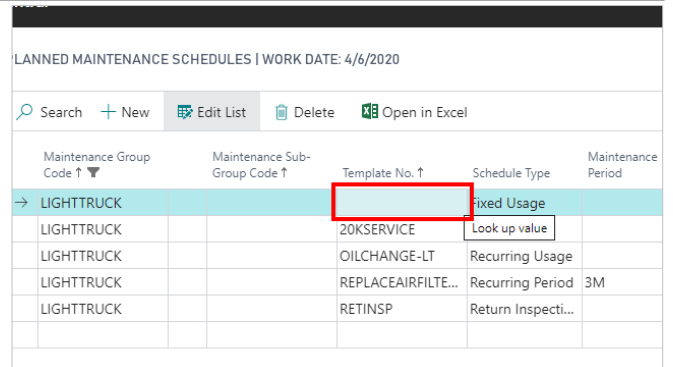
Click on the navigation menu item **Planned Maintenance Schedules**



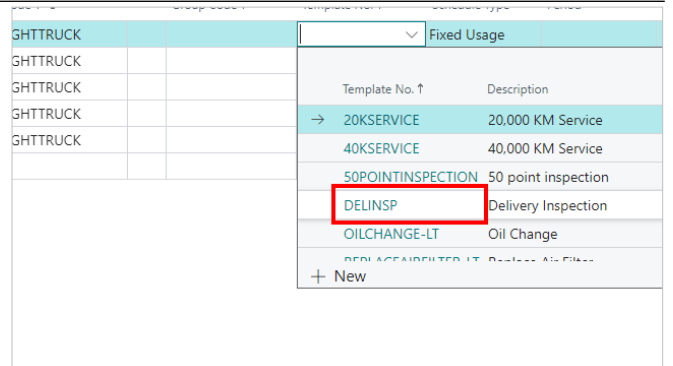
Click on the navigation menu item **New**



Click on the cell **Template No.**



Click on the link in cell **Template No.** with the value **DELINSP**





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Click on the cell Schedule Type

NCE SCHEDULES WORK DATE: 4/6/2020					
v Edit List Delete Open in Excel					
p	Maintenance Sub-Group Code ↑	Template No. ↑	Schedule Type	Maintenance Period	U
		DELINSP	Fixed Usage		
		20KSERVICE	Fixed Usage	Fixed Usage	20.00
		OILCHANGE-LT	Recurring Usage		8.00
		REPLACEAIRFILTE...	Recurring Period	3M	
		RETINSP	Return Inspecti...		

Click on the item **Delivery Inspection** in the list

NCE SCHEDULES WORK DATE: 4/6/2020					
v Edit List Delete Open in Excel					
p	Maintenance Sub-Group Code ↑	Template No. ↑	Schedule Type	Maintenance Period	U
		DELINSP	Fixed Usage		
		20KSERVICE	Fixed Usage		20.00
		OILCHANGE-LT	Recurring Usage		8.00
		REPLACEAIRFILTE...	Recurring Period		
		RETINSP	Recurring Usage & Period		
			Delivery Inspection		
			Return Insp	Delivery Inspection	

Usage and Period are not used for Delivery and Return type service, so these fields can be left blank.

Click on the cell Service Status

Usage	Usage UOM	Blocked	Service Status	No. Of Days For Service	Ser
0.00		<input type="checkbox"/>		0.00	
20,000.00	KM	<input type="checkbox"/>	Requires major ...	1.00	
8,000.00	KM	<input type="checkbox"/>	Requires minor...	0.50	
0.00		<input type="checkbox"/>	Requires minor...	0.50	
0.00		<input type="checkbox"/>	Requires minor...	0.25	
		<input type="checkbox"/>			

Click on the item **Requires minor service** in the list

Usage	Usage UOM	Blocked	Service Status	No. Of Days For Service	Ser
0.00		<input type="checkbox"/>		0.00	
20,000.00	KM	<input type="checkbox"/>		1.00	
8,000.00	KM	<input type="checkbox"/>	Requires minor service	0.50	
0.00		<input type="checkbox"/>	Requires major service	0.50	
0.00		<input type="checkbox"/>	In shop	0.25	
		<input type="checkbox"/>	Expired		
		<input type="checkbox"/>	Expired in shop		



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Click on the cell **No. Of Days For Service** with the value **0.00**

NOT SAVED					
Usage UOM	Blocked	Service Status	No. Of Days For Service	Service Cost	
	<input type="checkbox"/>	Requires minor s	0.00	0.00	
KM	<input type="checkbox"/>	Requires major ...	1.00	59.76	
KM	<input type="checkbox"/>	Requires minor...	0.50	37.50	
	<input type="checkbox"/>	Requires minor...	0.50	15.38	
	<input type="checkbox"/>	Requires minor...	0.25	11.13	
	<input type="checkbox"/>				

Enter the text **0.25**. Press the **Enter** key.

NOT SAVED					
Usage UOM	Blocked	Service Status	No. Of Days For Service	Service Cost	
	<input type="checkbox"/>	Requires minor s	0.00	0.00	
KM	<input type="checkbox"/>	Requires major ...	1.00	59.76	
KM	<input type="checkbox"/>	Requires minor...	0.50	37.50	
	<input type="checkbox"/>	Requires minor...	0.50	15.38	
	<input type="checkbox"/>	Requires minor...	0.25	11.13	
	<input type="checkbox"/>				

4.3.3. Triggering Delivery/Return service

The following demonstrates how to trigger Delivery and Return type service.

Click on the navigation menu item **Rental Contract**

Rental Terms	Rental Units	Rental Packages
ACTIONS		
+ Service Ticket Quote	+ Purchase Order	> New
+ Service Ticket	+ Purchase Invoice	> Payments
+ Service Unit	+ Rental Quote	> Reports
+ Service Template	+ Rental Contract	> Setup
+ Sales Quote	+ Rental Unit	Create a new rental contract for rent
+ Sales Order	> Service Management	> Rental Mana
+ Sales Invoice	> Service	Excel Report
+ Purchase Quote	> Planned Maintenance	

Click on the lookup button **Sell-to Customer Name**

		External Document No.
		Look up value Terms Code
		Deposit Amount
		Contract Total
		Outstanding Amount



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Click on the link in cell **No.** with the value **10000**

Process Contract Rental More options

General

Bill-to Customer Name

Invoice No.

Posting Date → 10000 Adatum Corporation 31

Order Date 201 Select record "10000" Arch 61

Document Date 30000 School of Fine Art 37

..... 40000 Alpine Ski House 31

..... 50000 Relecloud 31

Rental Lines Manage Line Function + New

Click on the cell **Rental Unit No.**

Document Date 4/6/2020

Rental Lines Manage Line Functions Fewer options

Rental Unit No. Standard Text Code Description

→ [] Look up value

Sales Lines Manage More options

Click on the lookup button in the cell **Rental Unit No.**

Document Date 4/6/2020

Rental Lines Manage Line Functions Fewer options

Rental Unit No. Standard Text Code Description

→ [] Look up value

Sales Lines Manage More options

Click on the link in cell **No.** with the value **RU10000-001**

Rental Unit No. Standard Text Code Description

→ []

Sales Lines Manage More options

Type No. Description

→ []

RU00010-0... 18 GA Brad Nailer - PS/PE

RU00010-0... 18 GA Brad Nailer - PS/PE

RU00010-0... 18 GA Brad Nailer - PS/PE

RU00010-0... 18 GA Brad Nailer - PS/PE

RU00010-0... 18 GA Brad Nailer - PS/PE

→ RU10000 : Nissan Titan Group MU3

RU10000-0... : 2015 Nissan Titan MU3

RU10000 Select record "RU10000-001" MU3

RU10000-0... 2017 Nissan Titan MU3

RU20000 Wacker 50Z3 Excavator Group

RU20000-0... Wacker 50Z3 Excavator PU

RU20000-0... Wacker 50Z3 Excavator PU



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If the selected unit has Delivery service set up, a notification will be displayed asking if you want to create a Maintenance Ticket.

Rental Terms Code
Deposit Amount
Contract Total
Outstanding Amount

020
020
020

ower options
Rental Code

A Delivery Inspection is set up for this rental unit. Do you want to create that service ticket now?

Yes No

Click on the button **Yes**

Outstanding Amount

A Delivery Inspection is set up for this rental unit. Do you want to create that service ticket now?

Yes No

Click on the link in cell **Service Ticket No.** with the value **ST00003**

1,399.20

Line Discount % Allow Zero Usa... Ret... Day Billa... Partial Return Date Service Ticket No.

0 ☐ ☒ ☐ ST00003

Open record "ST00003"

A new service ticket has been created for the selected unit, with the service template used for Delivery service already selected. From here you can process the ticket as you would normally.

Ticket Units/Lines Manage More options

Task Type ODT Service Unit No. Serial No. Description

→ Heading SU00011 2015 Nissan Tita

Posting SU00011 Delivery Inspectio

Alt1 Rental Unit Price 0.00

More options



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Click on the button **Close**

A screenshot of a software interface showing a dropdown menu. The menu has a header with columns 'Type', 'No.', and 'Description'. Below the header, there is a row with the values 'Resource', 'LABOR', and 'Labor - Delivery Inspectio'. At the bottom right of the dropdown, there is a button labeled 'Close' which is highlighted with a red rectangular box.

To trigger a Return Service, first you must ship and invoice the contract as normal. Then you must return the selected unit.

Click on the cell **Qty. to Return** with the value **0**

A screenshot of a table within a software application. The table has several columns: 'Tax Group Code', 'Qty. to Rent', 'Qty. on Rent', 'Qty. to Return', 'Qty. Returned', and 'Line Discount %'. The row for 'RENTAL' shows values 0, 1, 0, 0, and 0. The cell containing the value '0' under the 'Qty. to Return' column is highlighted with a red rectangular box.

Enter the text **1**.

A screenshot of a table, similar to the one above, showing the 'RENTAL' row. The 'Qty. to Return' cell now contains the value '1' and is highlighted with a red rectangular box.

Click on the navigation menu item popup **Rental**

A screenshot of the Dynamics 365 Business Central interface. The title bar says 'Dynamics 365 Business Central'. Below it, there is a navigation bar with a back arrow, the text 'RENTAL CONTRACT | WORK DATE: 4/6/2020', and the main title 'Rental Contract · RC00002'. Below the title, there are tabs for 'Process', 'Contract', 'Rental', and 'More options'. The 'Rental' tab is highlighted with a red rectangular box. Below the tabs, there is a 'General' section with fields for 'Sell-to Customer Name' (Adatum Corporation) and 'Quote No.'.



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Click on the link **Return Rentals**

RENTAL CONTRACT | WORK DATE: 4/6/2020

Rental Contract · RC000002

Process Contract Rental More options

Ship Rentals **Return Rentals** Bulk Returns Invo

Sell-to Customer Name Post the return of the rental units on the re
returns.

Quote No.

Posting Date 5/5/2020

Click on the button **Yes**

Are you sure you want to Return this rental contract?

Yes No

If thye selected unit has Return service set up, a notification will appear asking if you want to create a Maintenance Ticket.

A Return Inspection is set up for this rental unit. Do you want to create that service ticket now?

Yes No

Click on the button **Yes**

A Return Inspection is set up for this rental unit. Do you want to create that service ticket now?

Yes No



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Since the contract has been invoiced and returned it will now close, and you will be asked if you want to immediately view the created ticket.

Rental Terms Code
Deposit Amount
Contract Total
Outstanding Amount

020
020
020

ower options

Rental Terms Code Alt2 Rental Date
4/6/20

? A Return Inspection has been created for this rental unit. Do you want to view that service ticket now?

Yes No

Click on the button **Yes**

Outstanding Amount

? A Return Inspection has been created for this rental unit. Do you want to view that service ticket now?

Yes No

Click on the button **OK**

et #ST00004 - Adatum Default Service Unit No. SU00011
Chargeback

Return Posted Successfully.

OK

2015 Nissan Titan MU3
Return Inspection 4/6/2020 4/6/2020

A service ticket has been created for the selected unit, with the service template used for Return service already selected. From here you can process the ticket as you would normally.

Ticket Units/Lines Manage More options

Task Type	ODT Service Unit No.	Serial No.	Description
→ Heading	SU00011		2015 Nissan Titan
Posting	SU00011		Return Inspection