

NetScore Rental Suite App User Guide

V4.0

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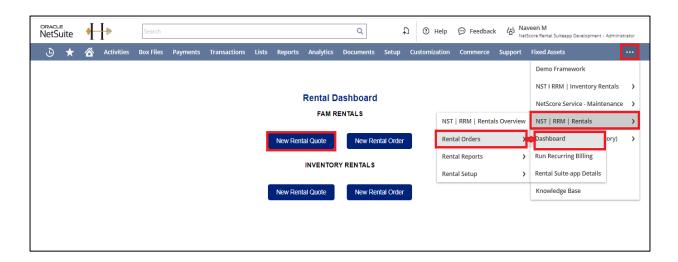


NetScore Rentals User Guide Overview

This guide provides users with information on how to operate NetScore Rental Services. It also covers details about the user interface, handling transactions, and managing records.

Creation of Rental Quote

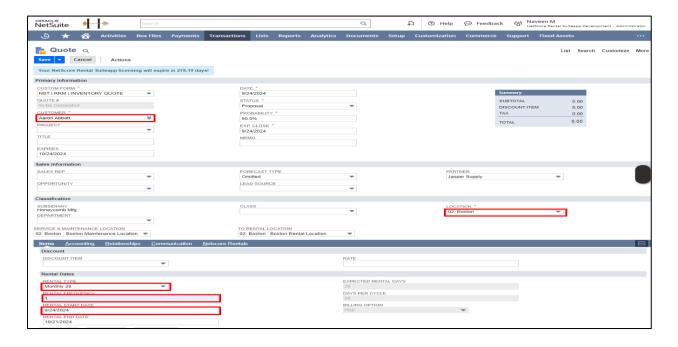
To create a rental quote, navigate to NST | RRM | Rentals >> Rental Orders >> Dashboard >> New Rental Quote.

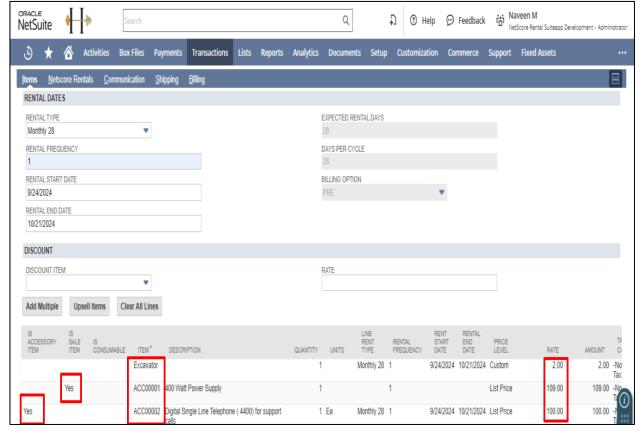


Users must select 'Customer,' 'Location,' 'Rental Type,' 'Rental Frequency,' and 'Expected Rent Out Date' in the Body fields. The line level will include 'Item' and 'Rate' fields to be selected in the Rental Quote. If any sale or accessory items are selected, please ensure check the checkbox for those items.

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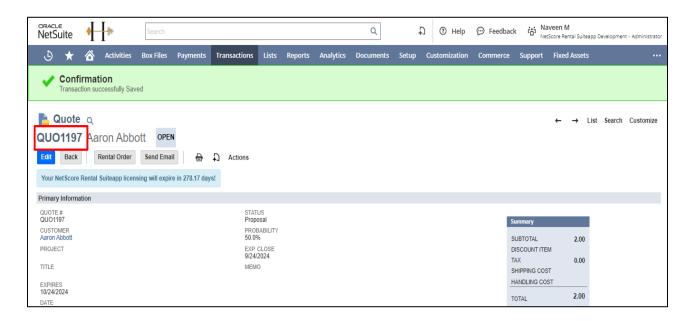
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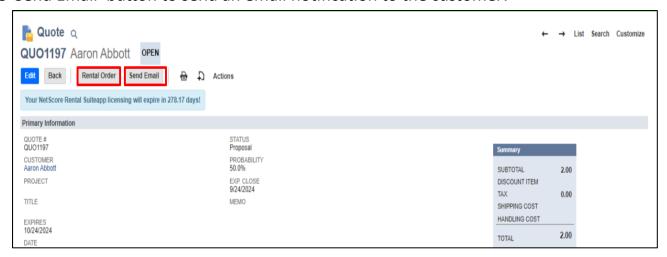
Note: When selecting a sale item, the 'Is Sale Item' checkbox must be checked. When selecting an accessory item, the 'Is Accessory Item' checkbox must be checked.

After entering all necessary data and items, click the 'Save' button to generate the quote.



Rental Order/Hybrid Order

Click the 'Rental Order' button to convert the quote into a rental order. Additionally, click the 'Send Email' button to send an email notification to the customer.

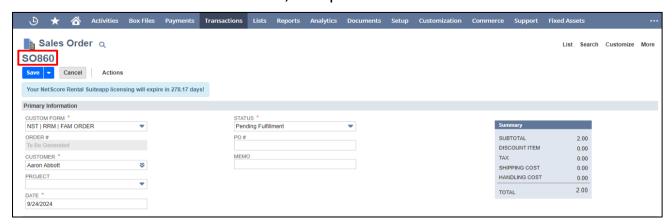


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Once the 'Rental Order' button is clicked, the quote will be converted into a Rental Order.



To send email notifications to the customer, the 'Send Email' checkbox must be selected. This checkbox is displayed in the NetScore Rentals Subtab.

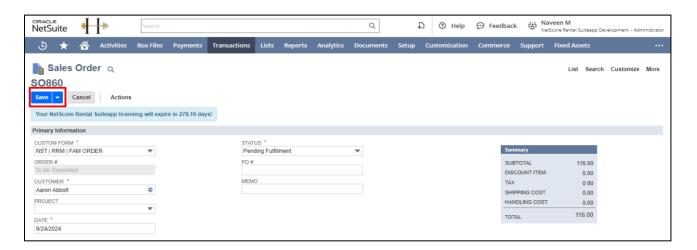


In this rental order, if more items are needed, additional items can also be added on this page. Once completed, click the 'Save' button to save the rental order.

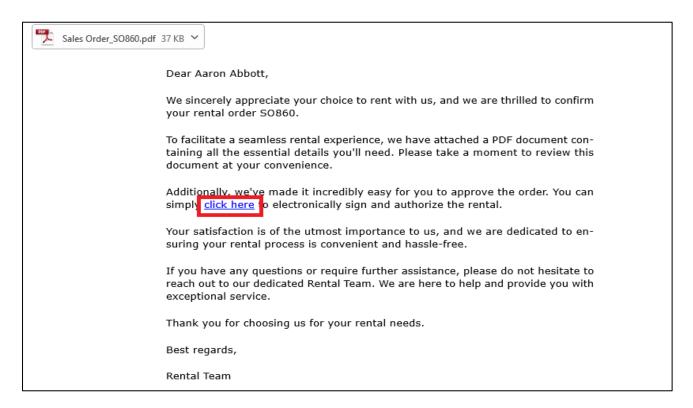
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The sales order has been generated successfully, and an email will be sent to the customer. The customer needs to open the email, review, and sign the terms and conditions page.

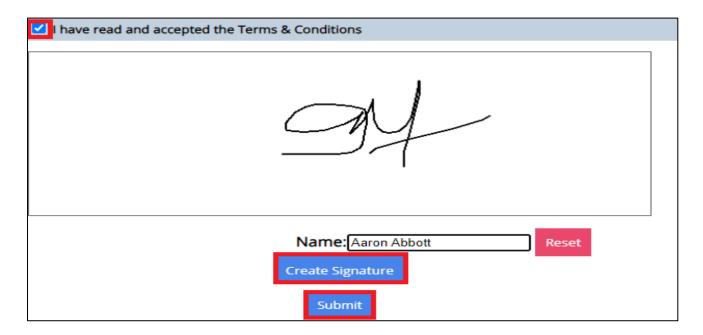


The terms and conditions page will be displayed. Click on the 'Terms and Conditions Acceptance' checkbox, sign in the designated area, and click the 'Create Signature' button. Finally, click the 'Submit' button to complete the process.

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The signature has been completed, and the rental order has been approved.



Open the sales order to check the status of the rental order, which should show as 'Pending Fulfillment.' The 'Fulfill' button will also be displayed.



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Rental Item Fulfillment

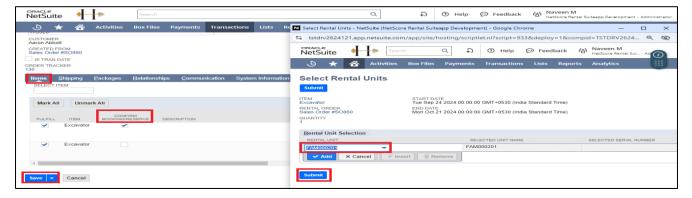
In the sales order, the 'Fulfill' button is used to fulfill both sale items and rental items. Click on the 'Fulfill' button to proceed with fulfilling the items.



After clicking on 'Fulfill,' the Item Shipment page will be displayed.



On the 'Items' tab, check the 'Confirm Booking/Reserve' box next to the item. A new window will open to select the rental unit. Choose the appropriate rental unit from the dropdown and click 'Submit' to confirm the selection. After that, save the record.

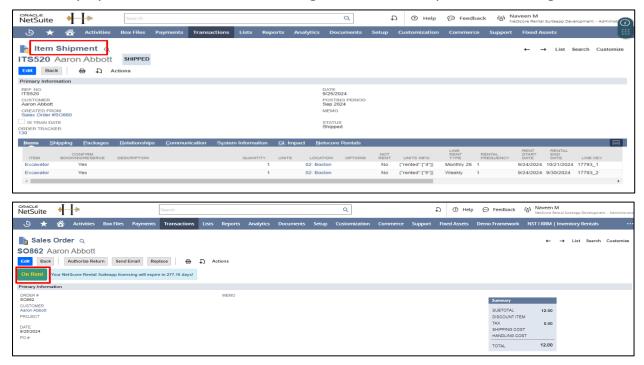


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Once the item shipment record is successfully created, the rental order status will automatically update to 'On Rent,' indicating that the rental process has begun.



On the active rental order, navigate to the 'Related Records' subtab and click on 'Related Records' to view the generated item Shipment record.



On the active rental order, navigate to the 'Netscore Rentals' subtab to view the invoice generated for the rental order, which will be a pre-billing invoice.

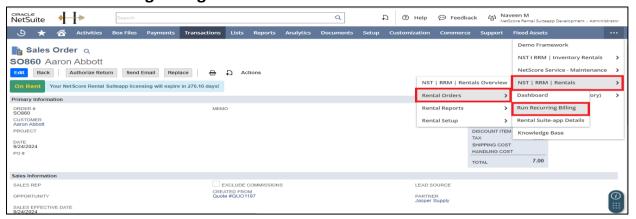
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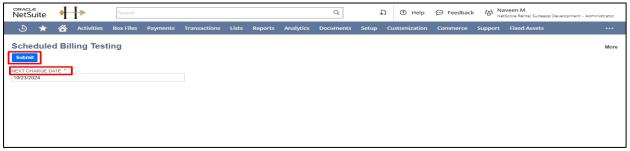


Run Recurring Billing

If you want to manually run the Recurring Billing, navigate to **NST | RRM | Rentals > Rental Orders > Run Recurring Billing**



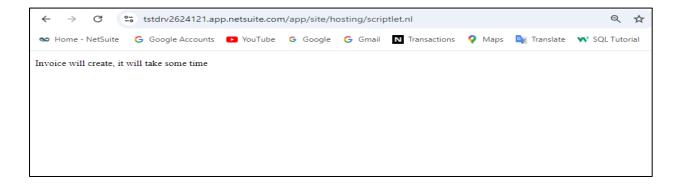
A new window will be displayed. Select the 'Next Charge Date,' which is taken from the 'Next Bill Date' field at the line level of the rental order, and then click the 'Submit' button.



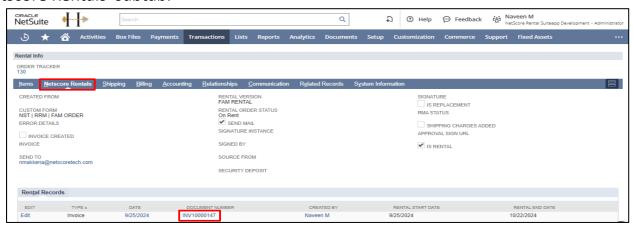
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It will take approximately 5 minutes if no other schedules are in the queue. Once completed, you can view the invoice created on the active rental order by navigating to the 'Netscore Rentals' subtab.



Rental Order Replacement

Click the Replace button to initiate the process of replacing the item.

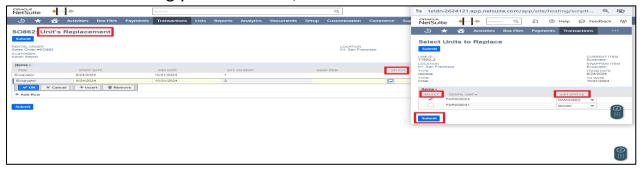


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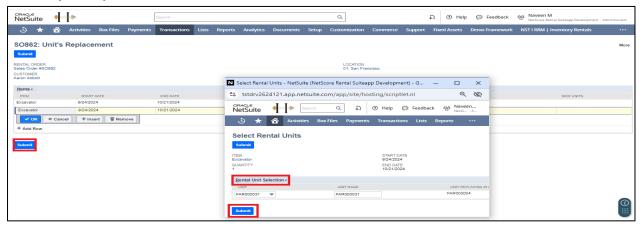
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The Unit Replacement page will be displayed. Scroll down to the line level and click the 'Select' checkbox. A new window will open to select the replacement rental unit and specify its condition. After making your selections, click the 'Submit' button.



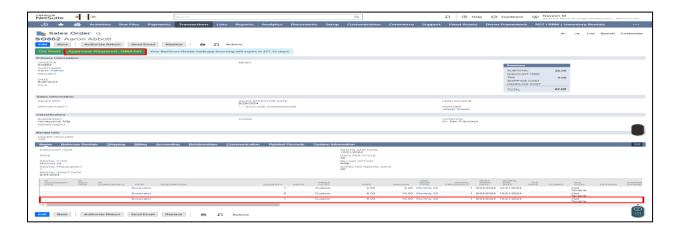
A new window will appear to select the new rental unit from the dropdown. After selecting the unit, click the 'Submit' button. Once submitted, the unit's replacement process will be successfully completed.



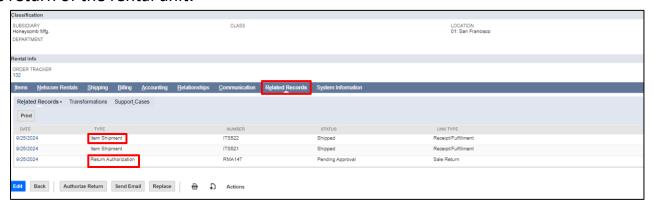
On the active rental order, the status will be updated to 'Approval Required: RMA147,' and a new line will be added for the replacement of the rental unit.

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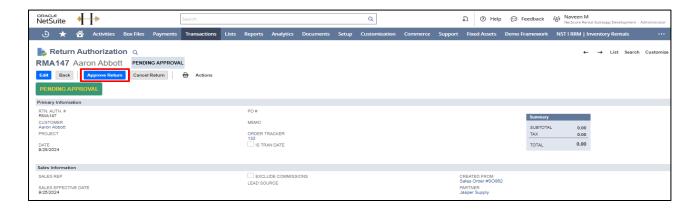
On the rental order, go to the Related Records subtab to check the item shipment record generated for the new rental unit and the return authorization record for the old rental unit being returned (for replacement). Then, open the return authorization record and approve the return of the rental unit.



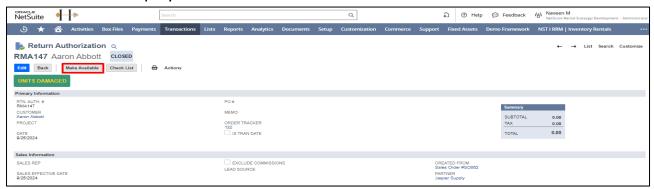
Click the 'Approve Return' button to process the return of the old Rental Unit.

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The rental unit has been returned, the status of the RMA is now closed, and the 'Make Available' button is displayed.



After clicking the 'Make Available' button, the Rental Units Management page will be displayed. Once the rental units have completed maintenance, select the units that are available for the next rental orders and click the 'Submit' button.



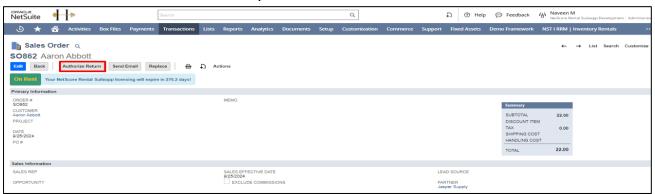
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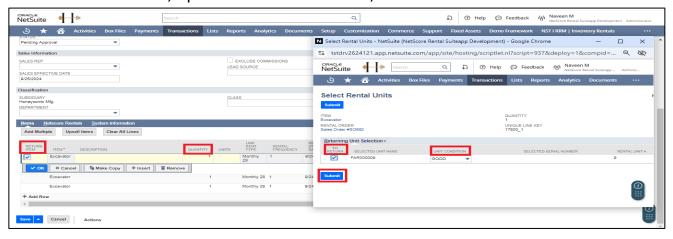


Rental Return Authorization.

Click the 'Authorize Return' button to process the return of the Rental Unit.



The Return Authorization page will be displayed. Scroll down to the item level, edit the quantity to be returned, and check the 'Return Item' checkbox. A new window will appear; check the 'To Return' box, update the unit condition, and click the 'Submit' button.

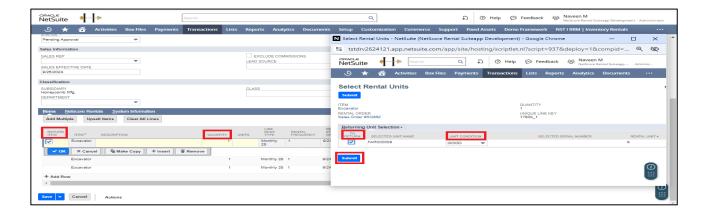


Remove the items that are not being returned by clicking the 'Remove' button, and then click the 'Save' button.

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The RMA has been generated successfully, the status has been changed to 'Pending Approval,' and the 'Approve Return' button is displayed.



Note: Once the RMA is approved, the status will automatically update to 'Closed.

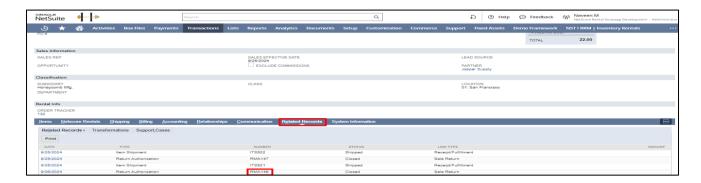


To check the RMA record in the Sales Order, go to the **Related Records** subtab and select **Related Records**.

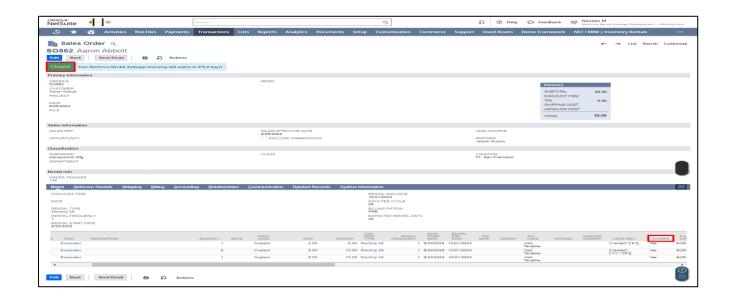
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Once all the line-level items are closed automatically, the status of the sales order will be changed to 'Closed.



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