Alphavima

PREXA 365

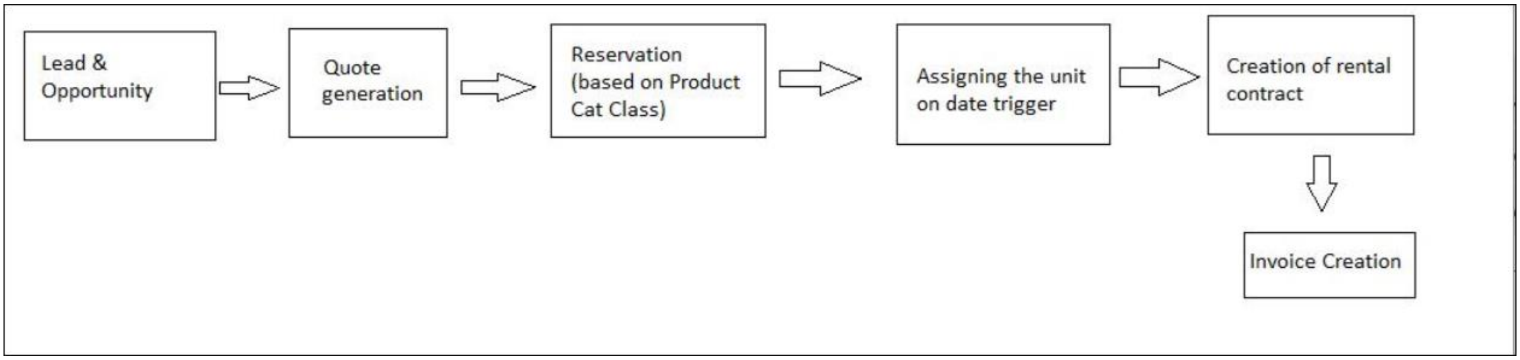
USER GUIDE

Index

Objective

This document contains detail end to end flow of the rental product called PREXA365.

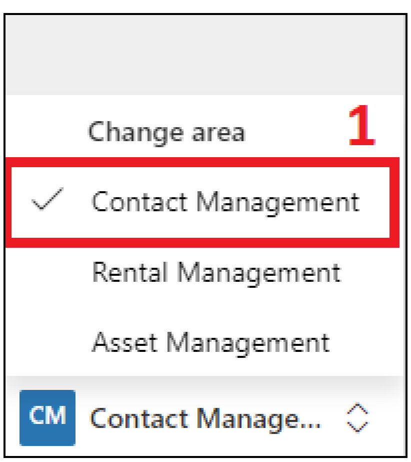
End to End flow of Prexa 365:

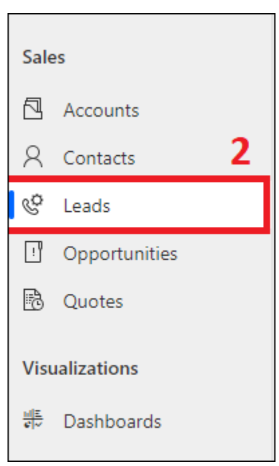


1. Contact Management

Contact Management flow: Lead (Account and Contact) → Opportunity (Quote)

- From the left navigation pane, pick the contact management area and select leads entity as shown in the below screenshot.

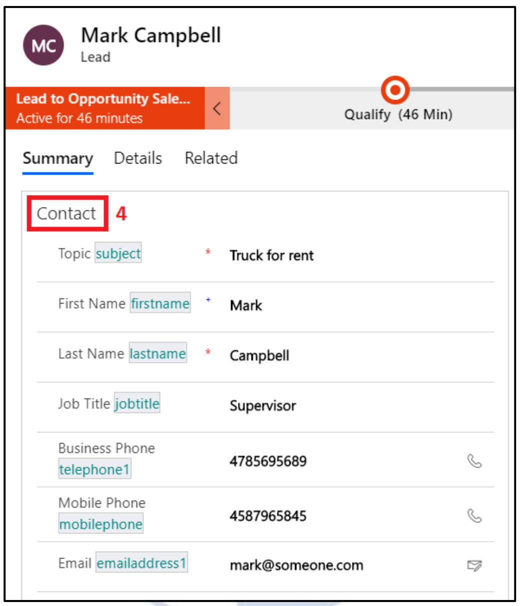


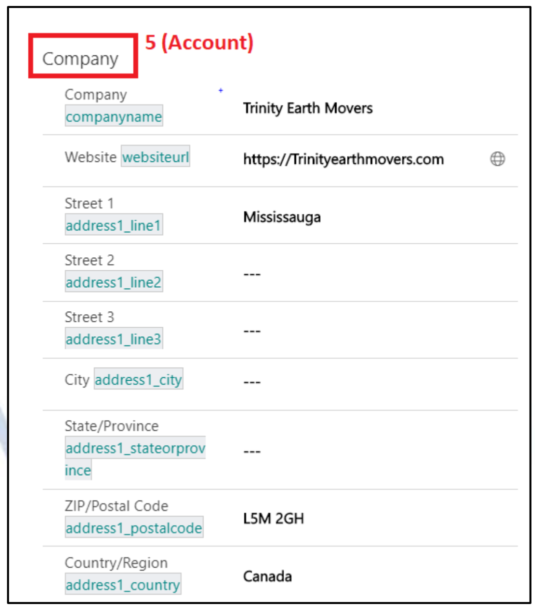


1.1 Lead Creation:

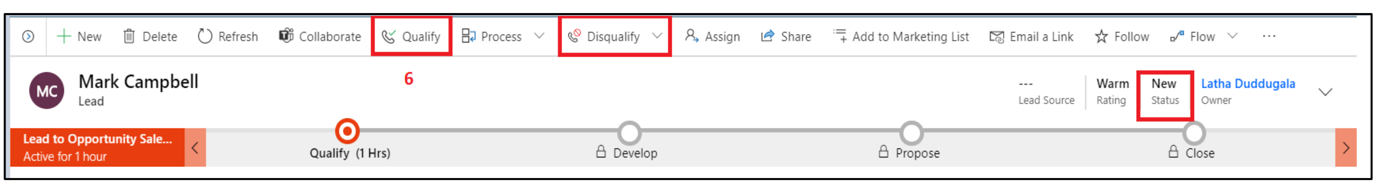
Once you select the leads entity, on the same screen in the header you will find new button, by clicking new you will open a form.

On the lead form, enter the details of the Contact, Account and Save the record



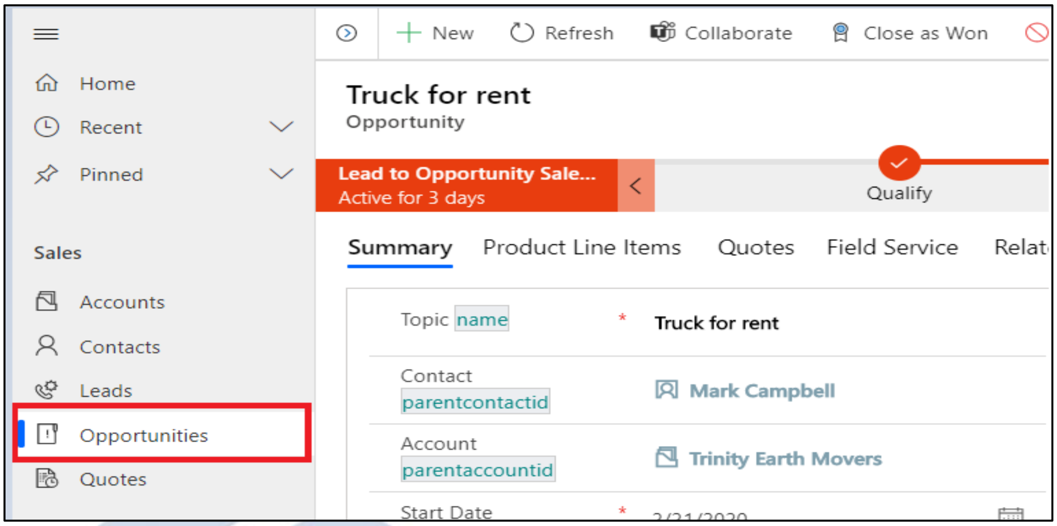


- Once the lead is created, the you can ***qualify or disqualify*** the lead to procced further or change the status of the lead as you progress from ***New to Contacted.***
- Considering that qualify is selected, then the status is changed to ***qualified*** and an opportunity record will be created with these subject, contact and account.

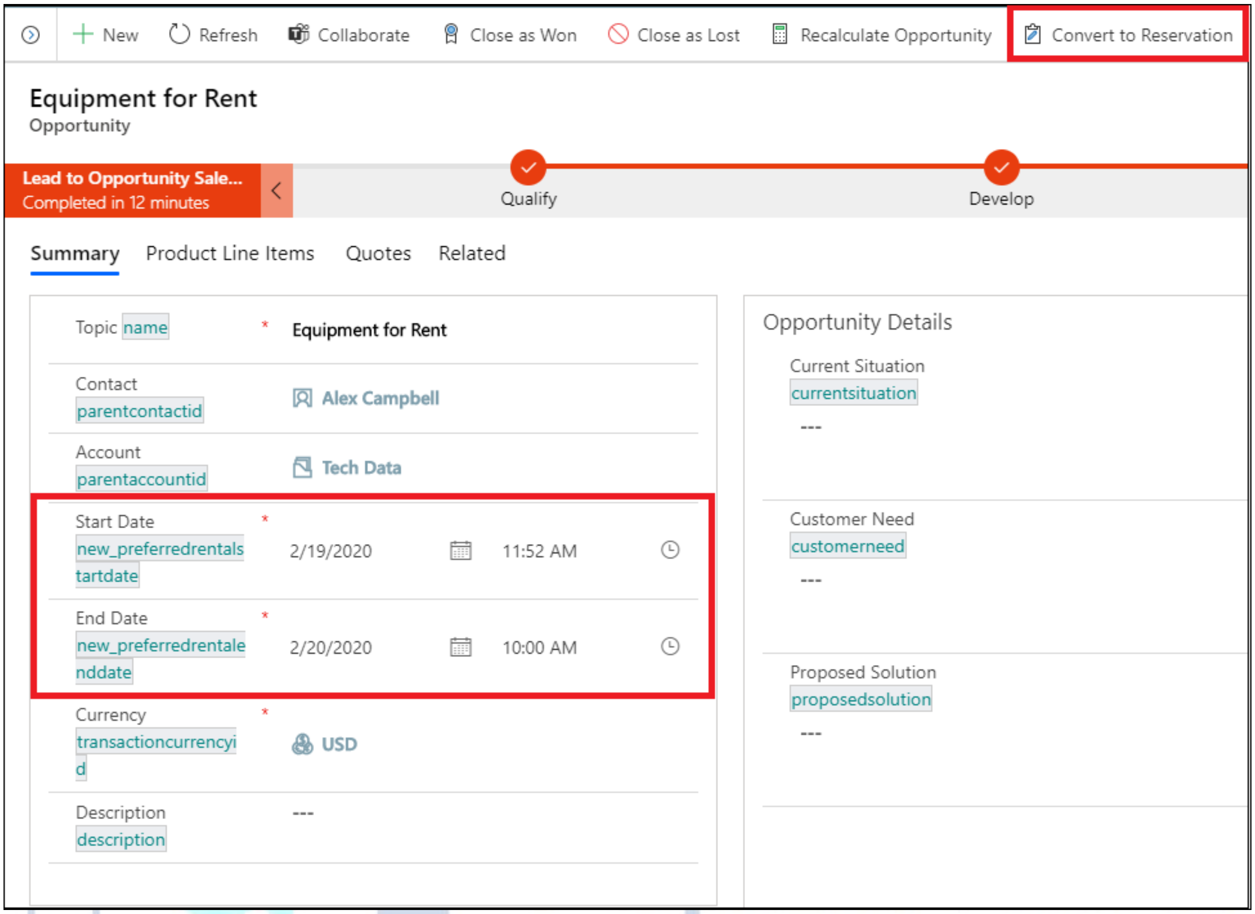


1.2 Opportunity Creation:

- Once a lead is qualified an opportunity record is created in the opportunity entity as shown in the screenshot below.



- Once the opportunity entity is selected, an opportunity form will open, some of the details like Contact and Account will be auto populated.
- Enter other details like state date and end date, which would be the expected start date and end date of the Rental Contract.
- A day prior to the start date an email will be sent to owner of this record to generate the Reservation as I have highlighted in the screenshot.

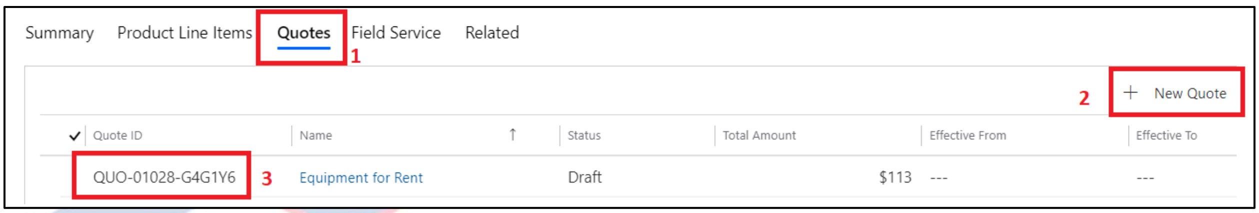


- The next is to move to the next tab called Product Line Items, based on the duration (difference between the start date and end date) must pick the Price List (could be Weekly or Monthly).
- The next step is to add the products in the category level so click on the Add Product button (Step 3).

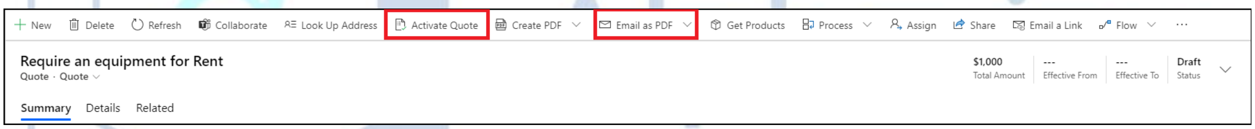
- Once Add Products button is clicked an opportunity line form will be opened, where we will pick the product based on hierarchy level (Product Hierarchy -- Reporting Category → Sub Category → Cat class → Product Description → Serialized Unit) on the opportunity.

1.3 Quote Creation

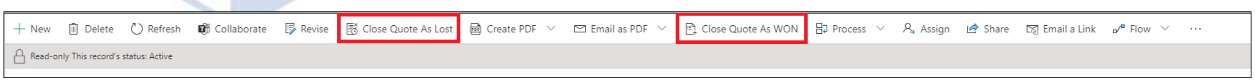
- The next step to select the Quotes Tab, and click on New Quote, a quote will be autogenerated as shown in the screenshot below. This quote will be sent to the customer and wait for their approval.



- Once the quote is accessed, the next step is to activate the quote and send an email of the quote to customer.



- When the quote is confirmed from the customer, then the quote is to be closed as WON or LOST.

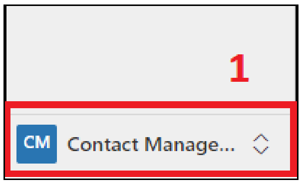


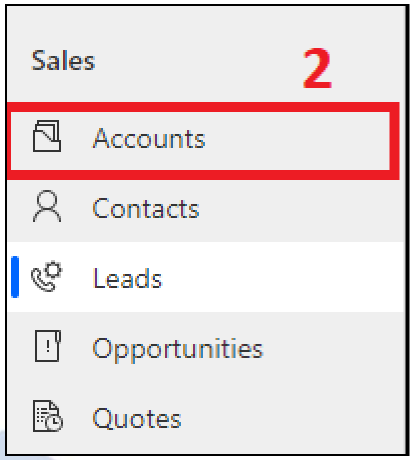
- Once all the above steps are accomplished, can go ahead to create a reservation by clicking on the Convert to Reservation step.

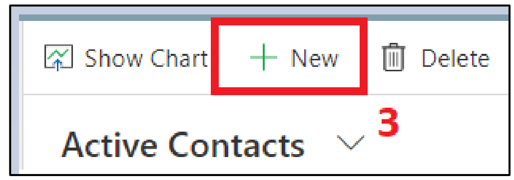
- Apart from the above approach, we can also create a contact and account individually with out any link to the lead and opportunity business process flow.

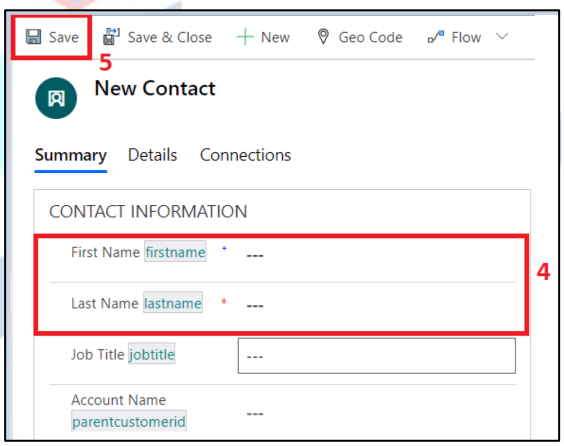
1.4 Contact Creation

- One contact is one individual, at the bottom of the left navigation pane, click on the Contact Management area which is the step 1 in the below screen shot → choose Contacts Entity → opens a form then enter the details like first name, last name etc., →save the record.





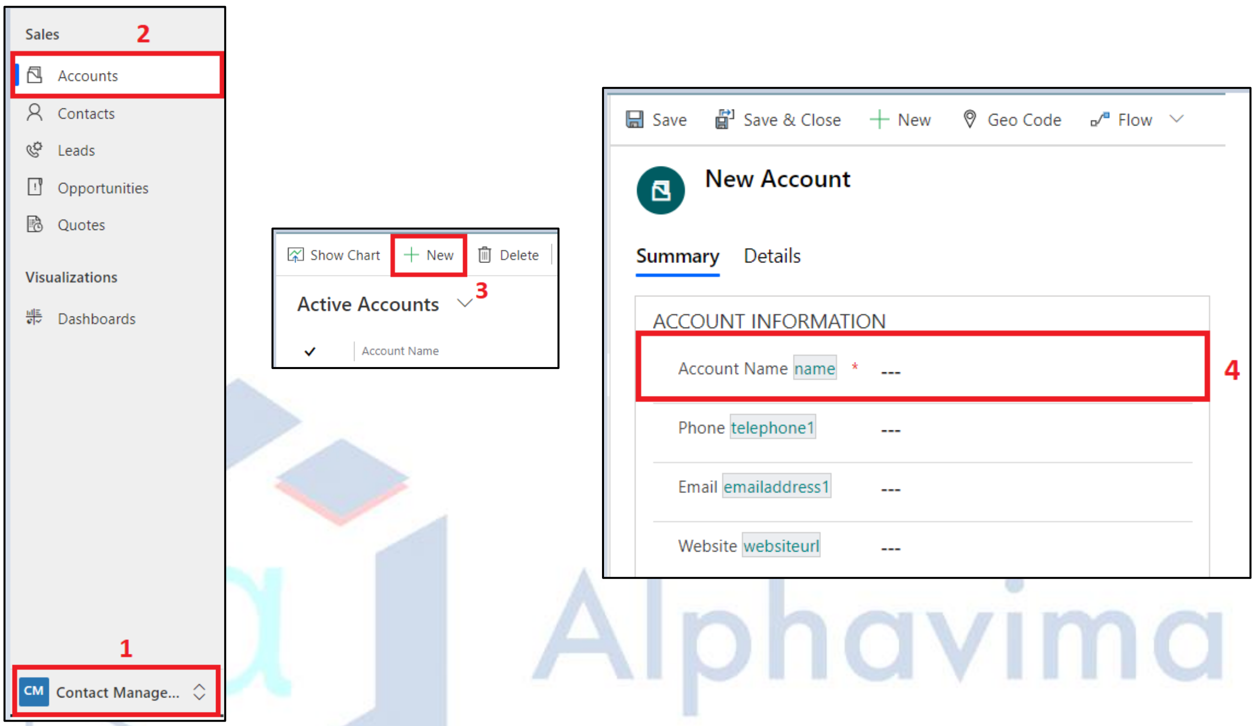




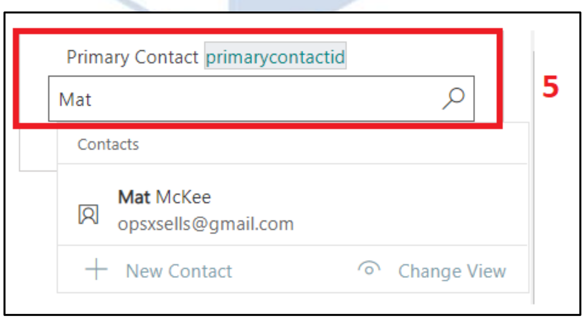
Alphavima

1.5 Account Creation

- One account is one Organization, from the navigation pane select the contact management area and click on the account's entity → new → enter the account name

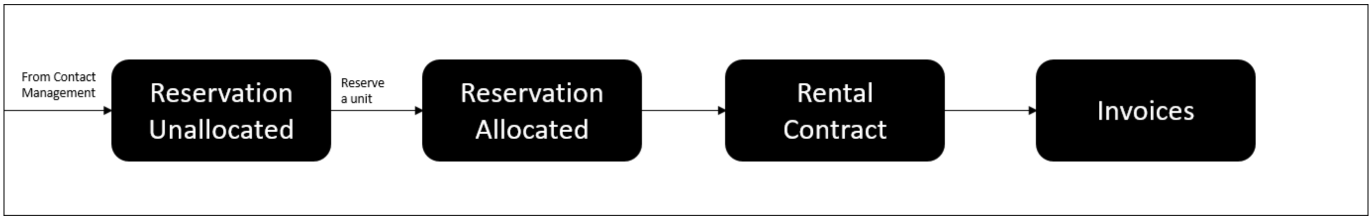


1.6 Associate Contact with Account



2. Rental Management

Rental Management flow: Reservation Unallocated→Reservation Allocated →Rental Contract →Invoices

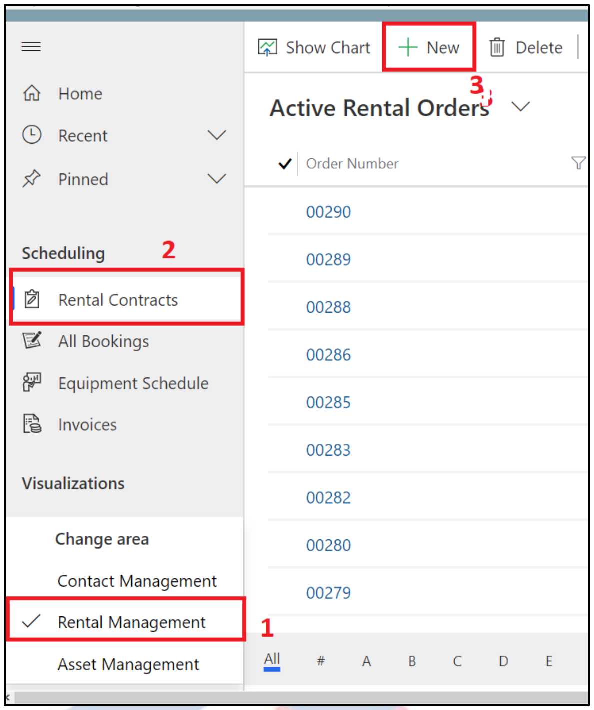


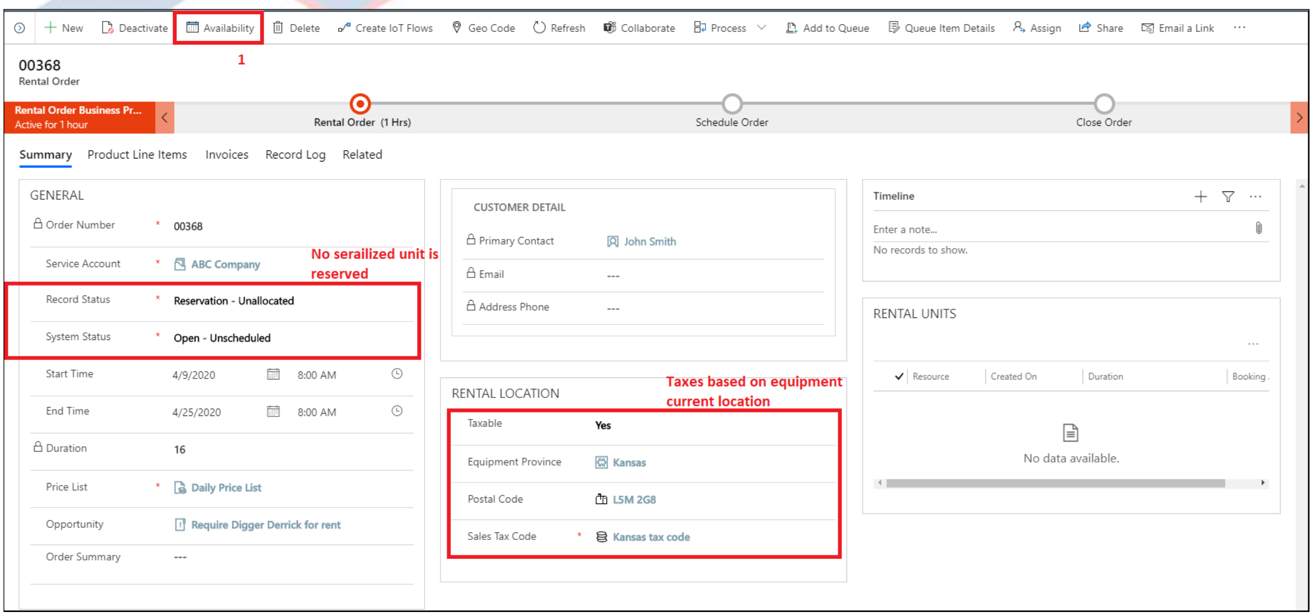
There are two ways of creating a rental contract

1. Manual creation of Rental Contracts
2. Automatic creation from Opportunities, by clicking on the button "Convert to reservation".

2.1 Manual - Rental Contract Creation

- Manual creation of rental contracts comes into picture when the customer wants the equipment for rent immediately or the customer is a returning customer. In this step we don't have to reserve the equipment rather send the equipment on rent right away.
- If creating a rental contract manually, from the left navigation pane, select the Rental Management area and select the Rental Contracts entity, to create a new contract manually click on the new button and form will open.



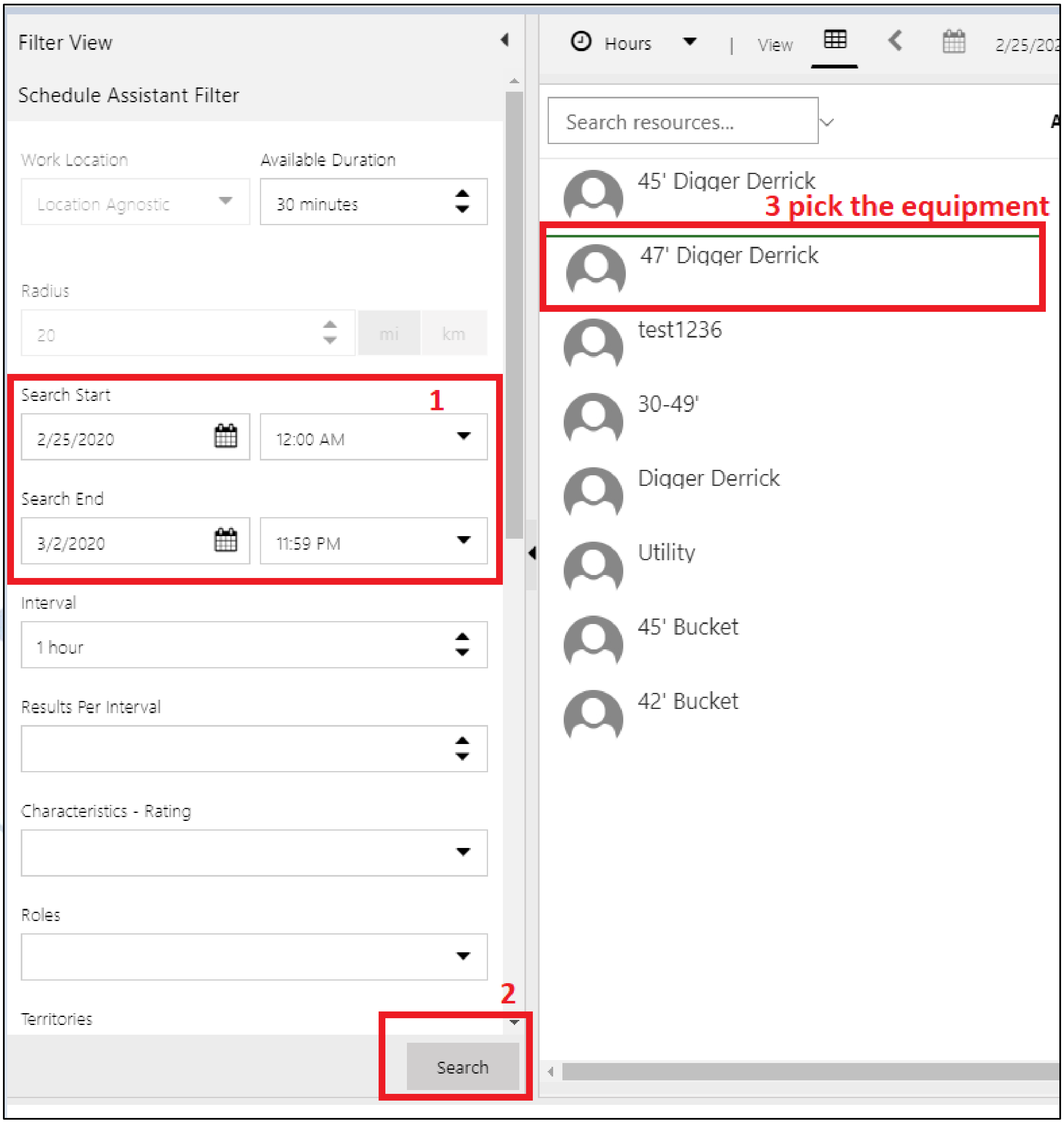


In manual creation, enter the record status as Reservation Unallocated because no serialized unit is reserved yet.

- On the system status field that's highlighted on the rental contract corresponds to the bookings.
- If the status is
  1. Open-Unscheduled → No bookings made, reservation is made, and quote is generated on the opportunity level
  2. Open-Scheduled → When booking record is created and booking status on the booking's entity (Bookable Resource Bookings) is ***Reserved***.

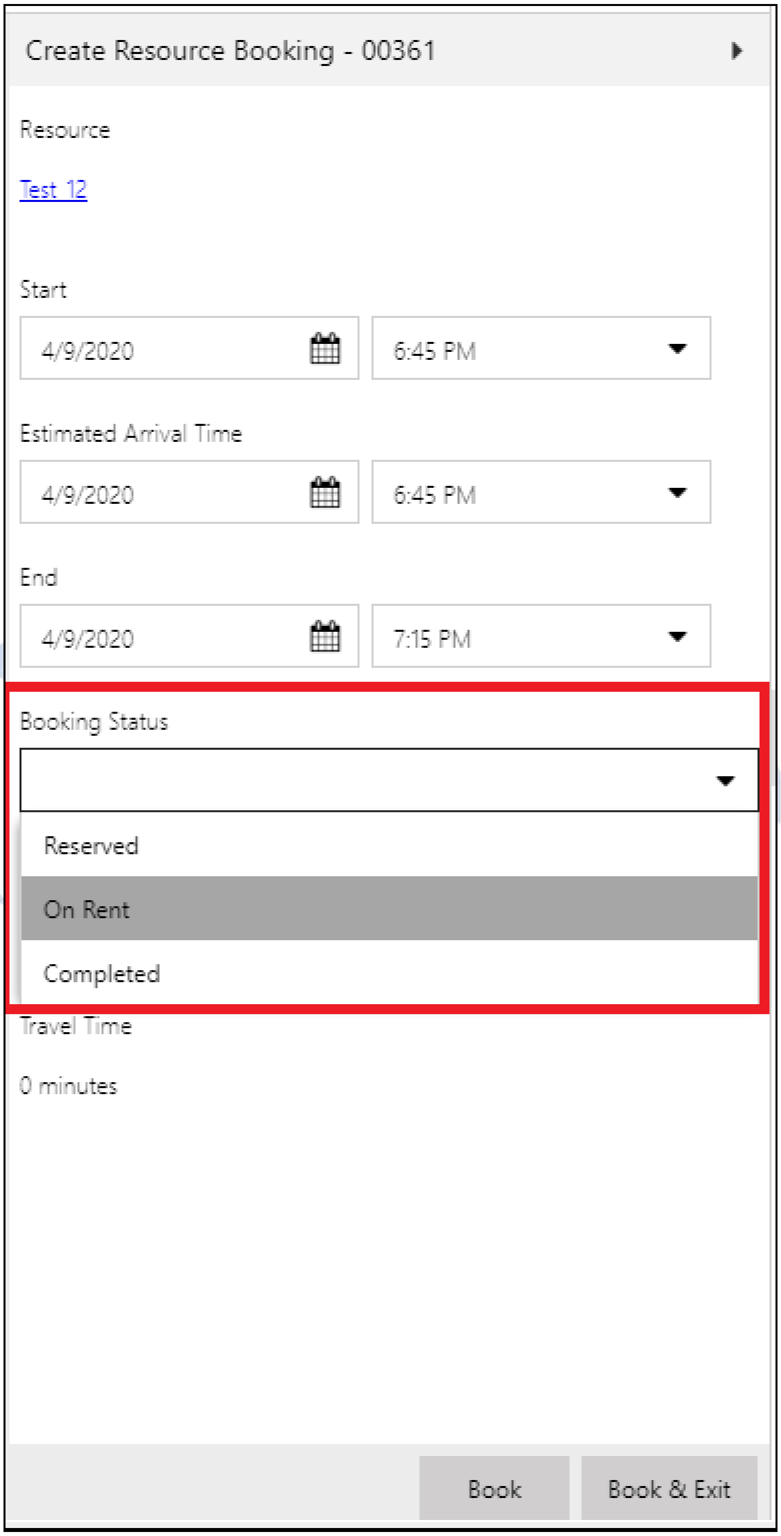
3. Open-In progress → When the booking status on the Booking's entity (BRB) is ***On Rent***
4. Open-Completed→ Booking Status is ***Completed***
5. Closed-Posted → An officer will check all the details and change the status to ***closed posted***
6. Closed-Canceled → Booking status is ***Cancelled***

- The next step is to pick a serialized unit and reserve it, by clicking on the button "Availability" from the above screenshot.
- Once Availability button is clicked, this leads to a Schedule Board. On the Schedule Board, enter the start date and end date and click on search button, on the right can view the list of available resources.

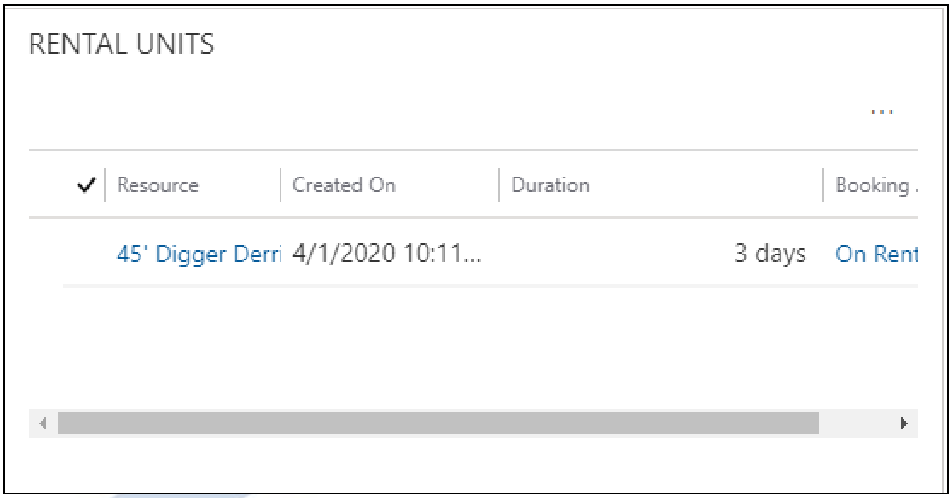


- Once the serialized unit is selected, on the right there will be a popup as shown in the below screenshot. Enter the details like start date and end date which should match the rental contract start date and end date. Enter the booking status,
    1. On rent → Equipment has gone for rent
    2. Reserved → Equipment has been booked
    3. Completed → Equipment has accomplished the rental contract
    4. Cancelled → Equipment has been cancelled/returned

- Click on Book will stay on same screen and make another booking against the same rental contract.
- Click on Book and Exit will exit the schedule board.



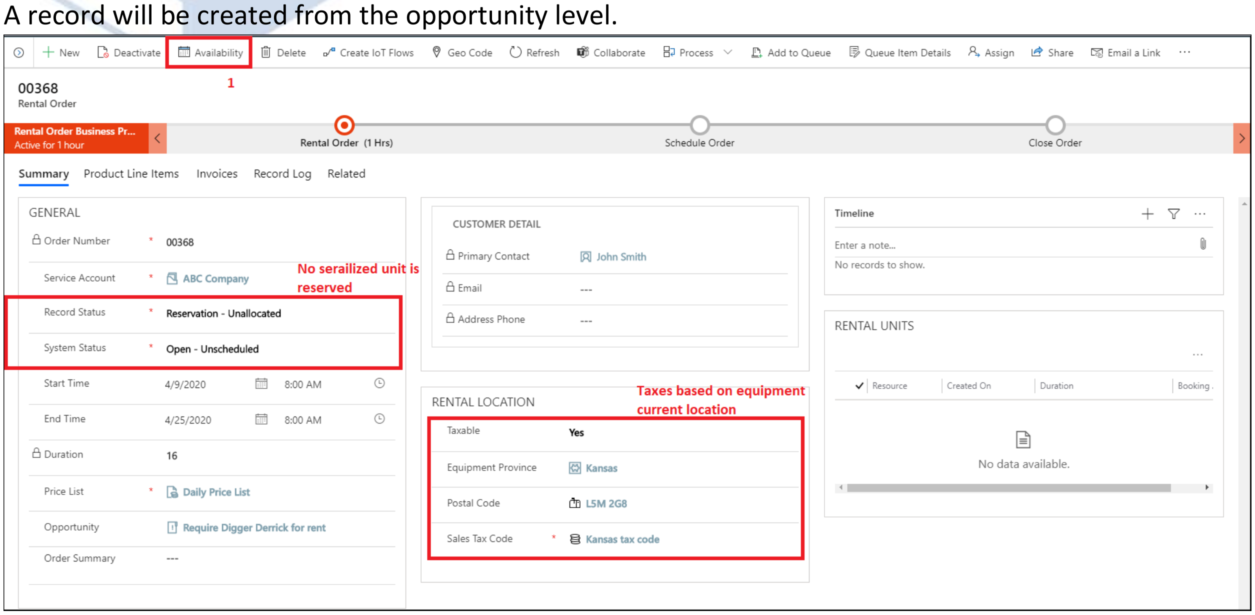
- Once the schedule board is closed, under rental units on the rental contract a new record will be created, holding the information about the start date and end date of the bookings, and the booking status.



If there are any changes to the bookings, the booking status can be edited by entering into the record as shown above.

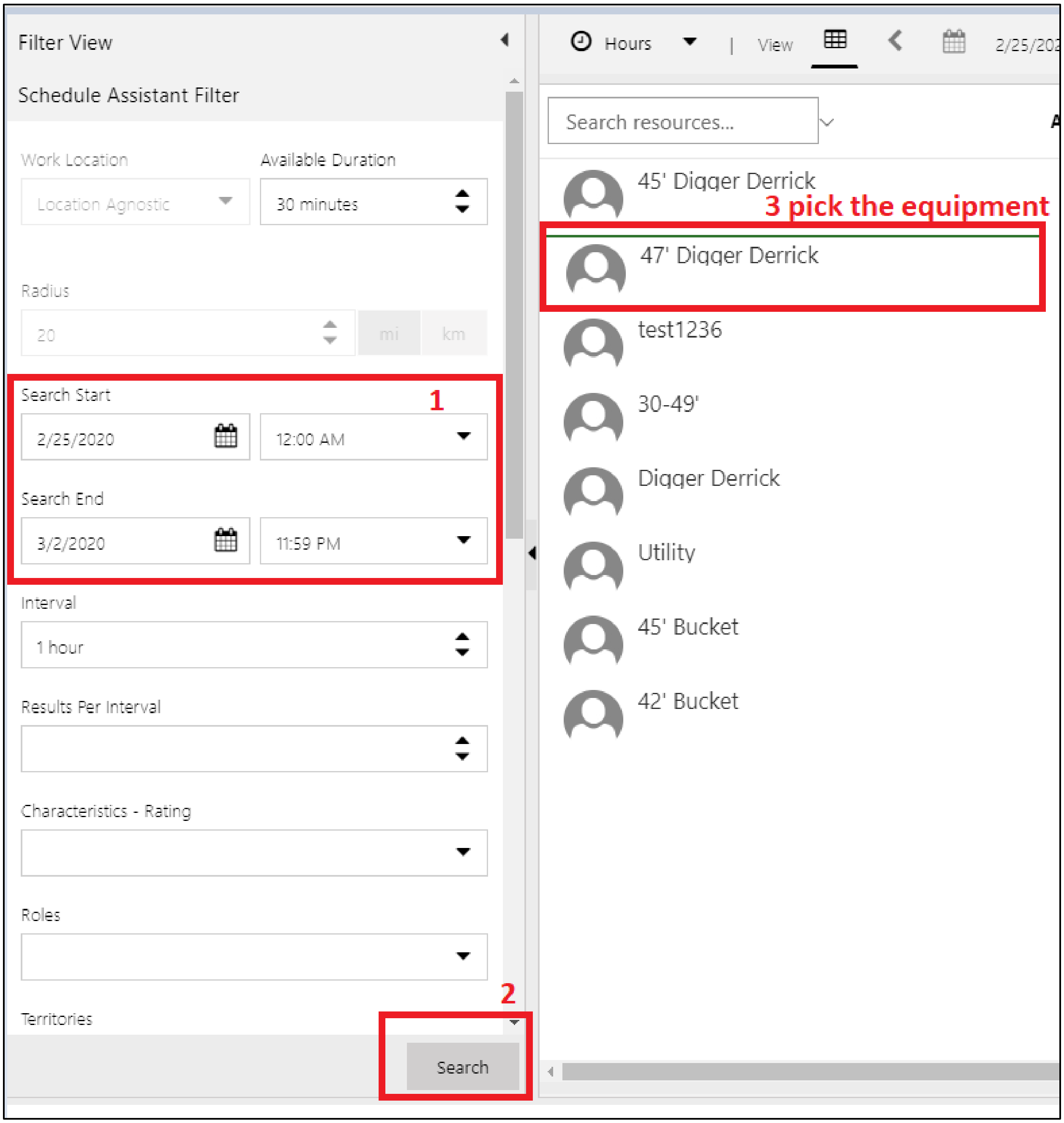
2.2 Automatic Creation of Rental Contract

- When we complete the lead – opportunity lifecycle, and if the customer wants the equipment for a future date we create a reservation allocation step and wait to convert to a rental contract as the date arrives.
- If creating the rental contract form the opportunity (From convert to Reservation button on opportunity), all the details will be auto populated from the opportunity.
  A record will be created from the opportunity level.



- On the system status field that's highlighted on the rental contract corresponds to the bookings.

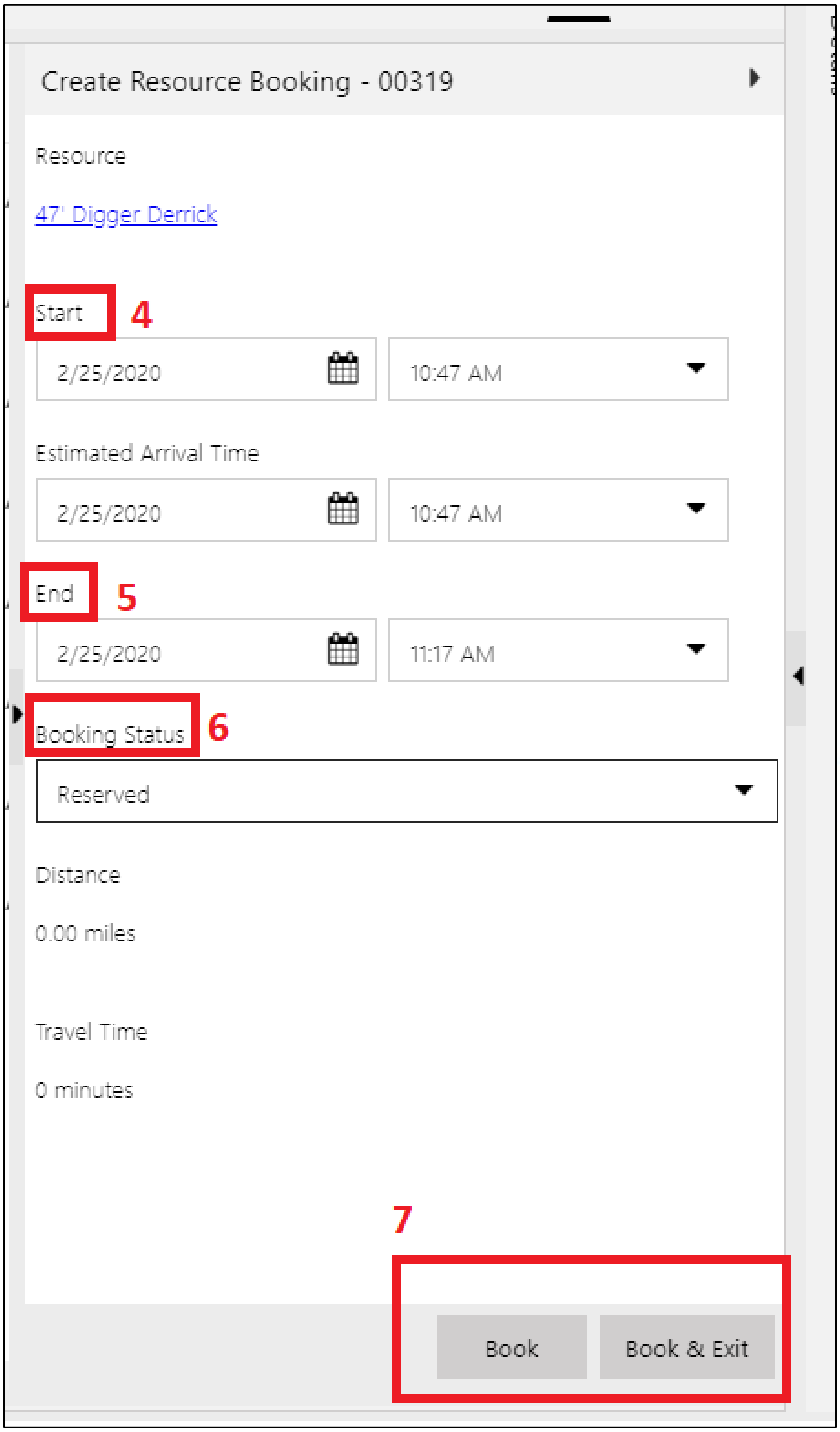
- If the status is
    7. Open-Unscheduled → No bookings made, reservation is made, and quote is generated on the opportunity level
    8. Open-Scheduled → When booking record is created and booking status on the booking's entity (Bookable Resource Bookings) is ***Reserved***.
    9. Open-In progress → When the booking status on the Booking's entity (BRB) is ***On Rent***
    10. Open-Completed→ Booking Status is ***Completed***
    11. Closed-Posted → An officer will check all the details and change the status to ***closed posted***
    12. Closed-Canceled → Booking status is ***Cancelled***
- Initially there are no records, under the reservations in order to make one, click on the "availability" button on the rental contract form.
- This leads to a Schedule Board. On the Schedule Board, enter the start date and end date and click on search button, on the right can view the list of available resources.



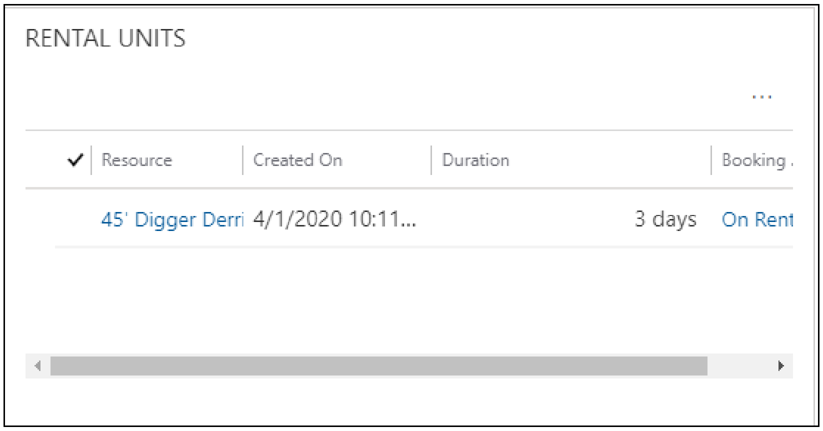
- Once the serialized unit is selected, on the right there will be a popup as shown in the below screenshot. Enter the details like start date and end date which should match the rental contract start date and end date. Enter the booking status,
  5. On rent → Equipment has gone for rent
  6. Reserved → Equipment has been booked
  7. Completed → Equipment has accomplished the rental contract
  8. Cancelled → Equipment has been cancelled/returned

- Click on Book will stay on same screen and make another booking against the same rental contract.

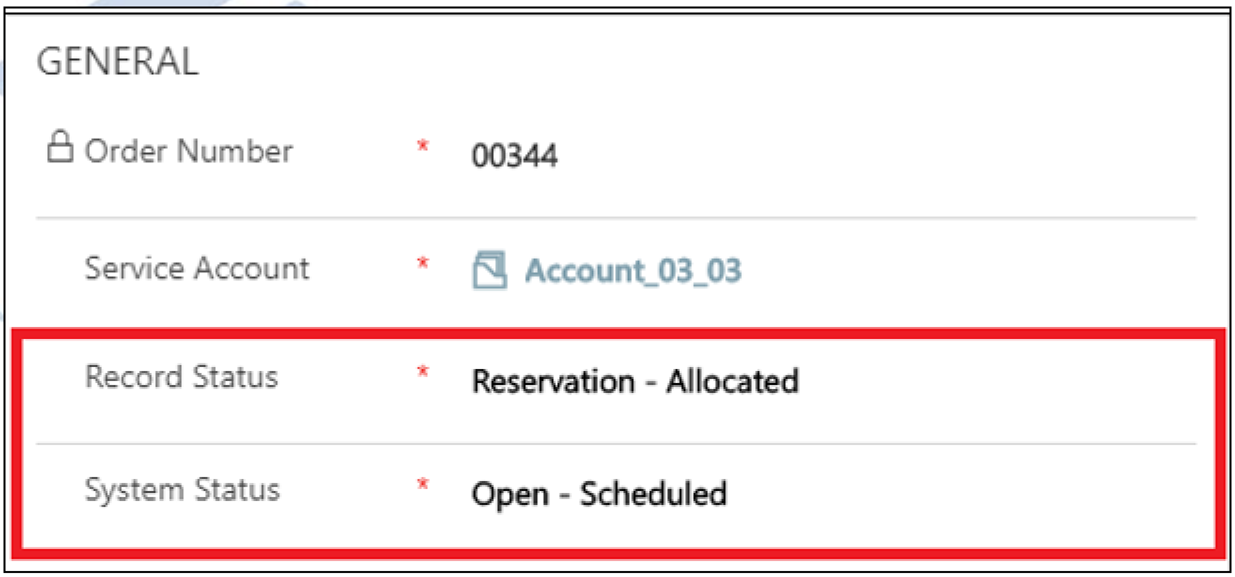
- Click on Book and Exit will exit the schedule board.


Create Resource Booking - 00319
Resource
47' Digger Derrick
Start
4
2/25/2020
10:47 AM
Estimated Arrival Time
2/25/2020
10:47 AM
End
5
2/25/2020
11:17 AM
Booking Status
6
Reserved
Distance
0.00 miles
Travel Time
0 minutes
7
Book
Book & Exit

- Once the schedule board is closed, under rental units on the rental contract a new record will be created, holding the information about the start date and end date of the bookings, and the booking status.

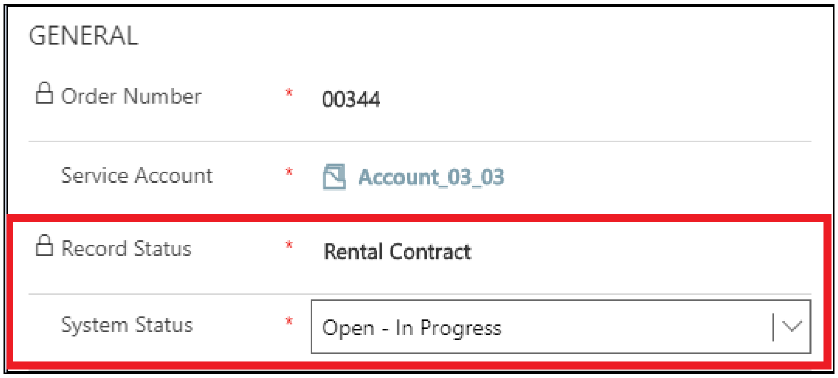


- Once a booking is made the record status should be changed to reservation allocated, which means a serialized unit is reserved or allocated as shown in the screenshot below.

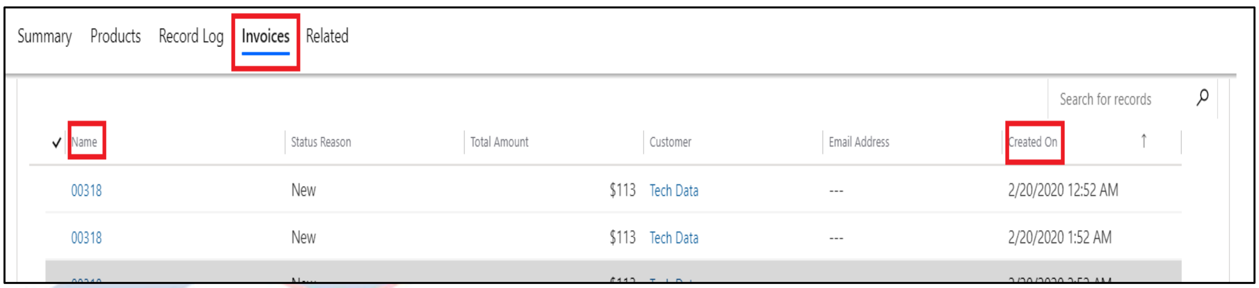


- When the calendar date arrives, we must convert this reservation allocated to rental contract but clicking on the button “Convert to Rental Contract”

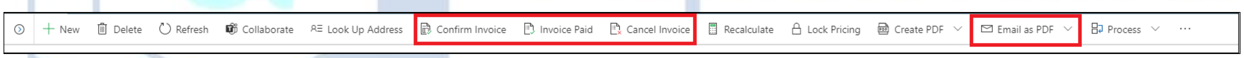
- Automatically the Record Status will be changed to “Rental Contract”



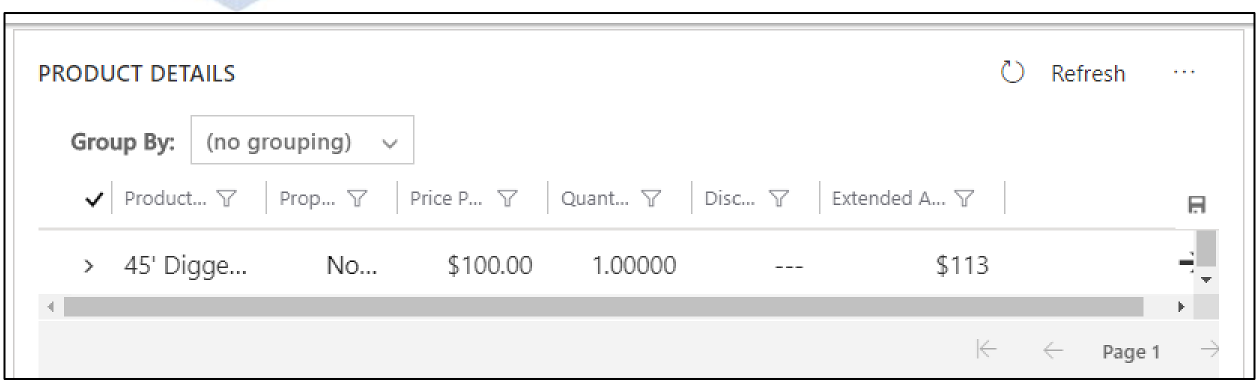
- For a quick view of list of invoices, can view under Invoices tab on the rental contract.



- The current solution can auto generate the invoices, for now they are generated for every 28 days from the start date.
- For every generation of invoice, a copy of email is sent to the customer by clicking on the button . Based on the customer response, the invoice can be confirmed or canceled.

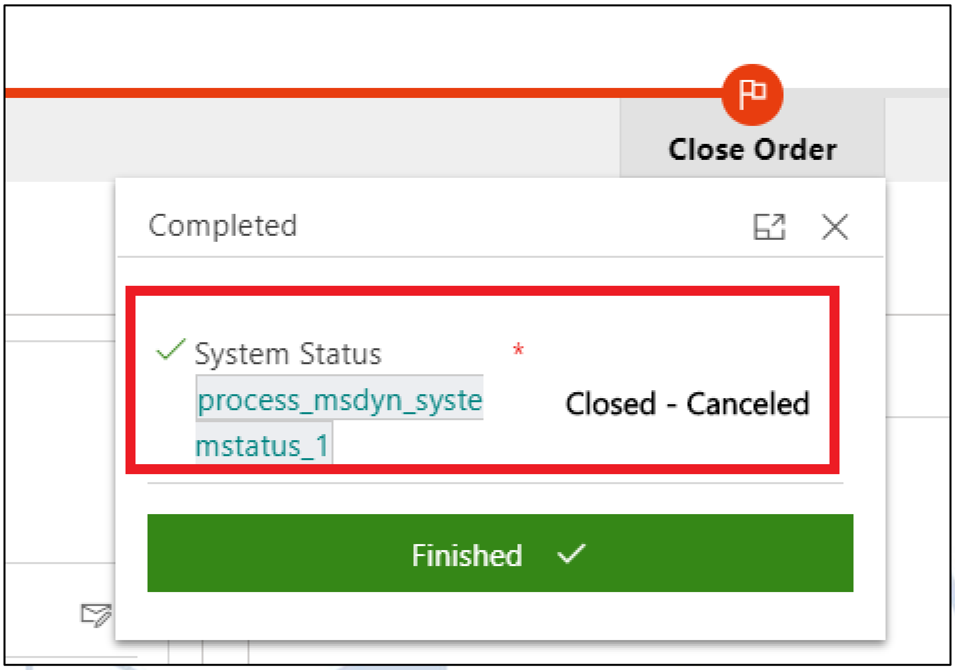


- A copy of invoice contains all the details from the rental contract. Under the Product details sub grid, can view the list of products associated to this rental contract.

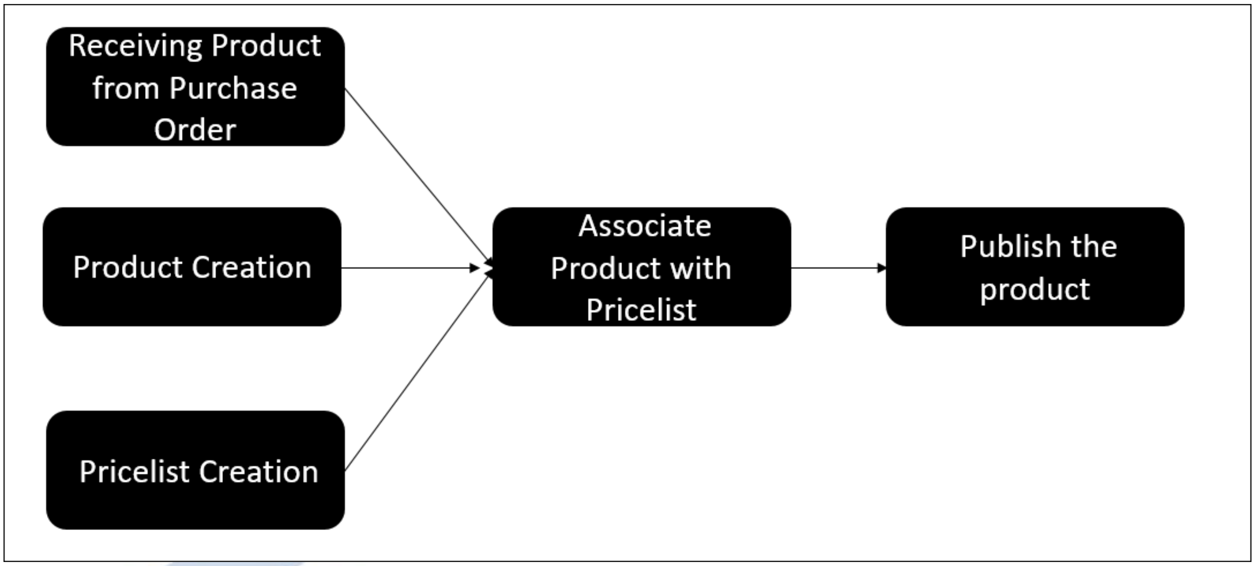


2.3 Closing the Rental Contract

- Once the equipment has been returned then the system status can be changed to the closed Completed, as well as on the Business Process Flow the status also can be changed accordingly.
- When all the bookings associated to the rental contract are cancelled then the status of the rental contract would be closed cancelled.
- If all the bookings are completed, then the status of the rental contract will be open completed.



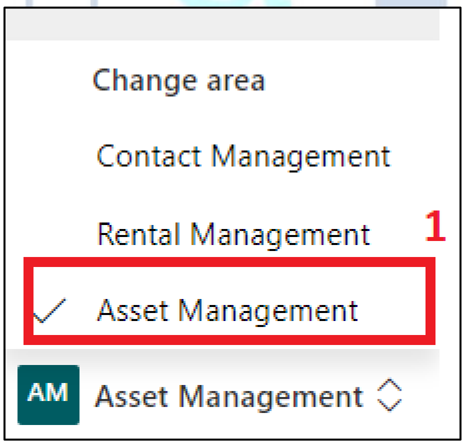
3. Asset Management

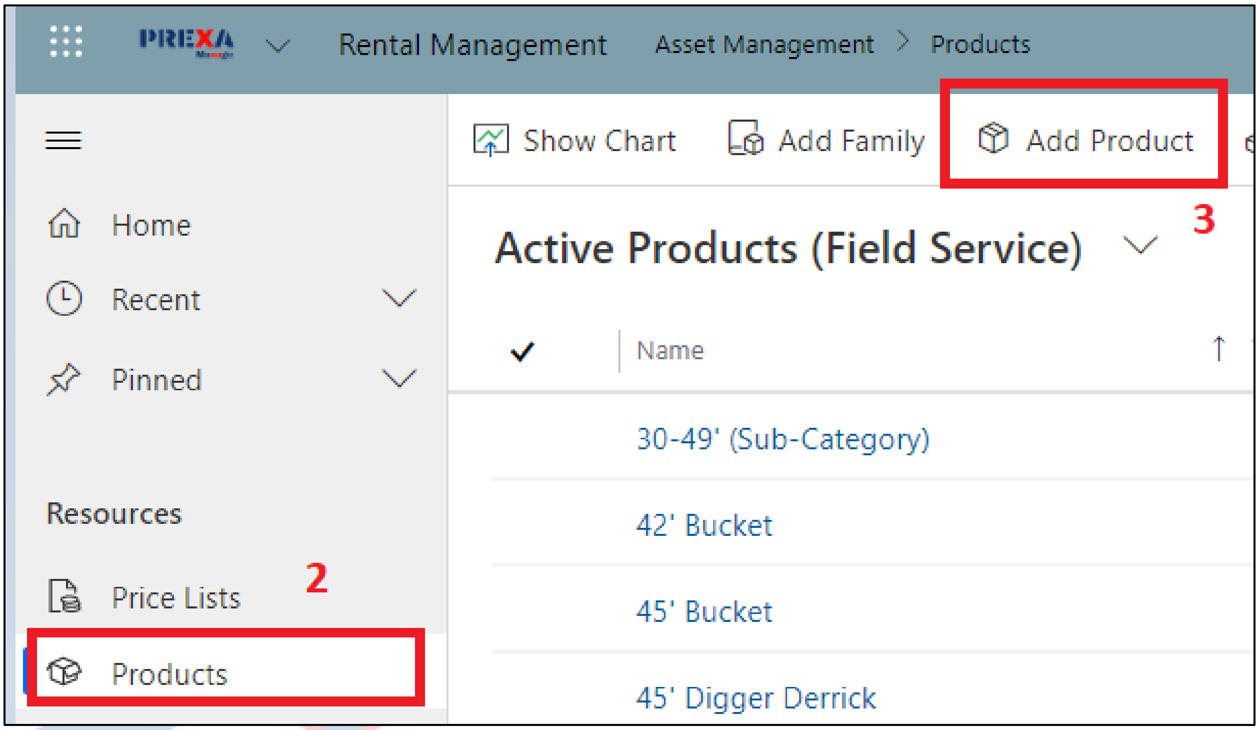


This module contains all the functionalities associated to receiving the products from Purchase Order and inventory management and creation of products and associating a product with price list.

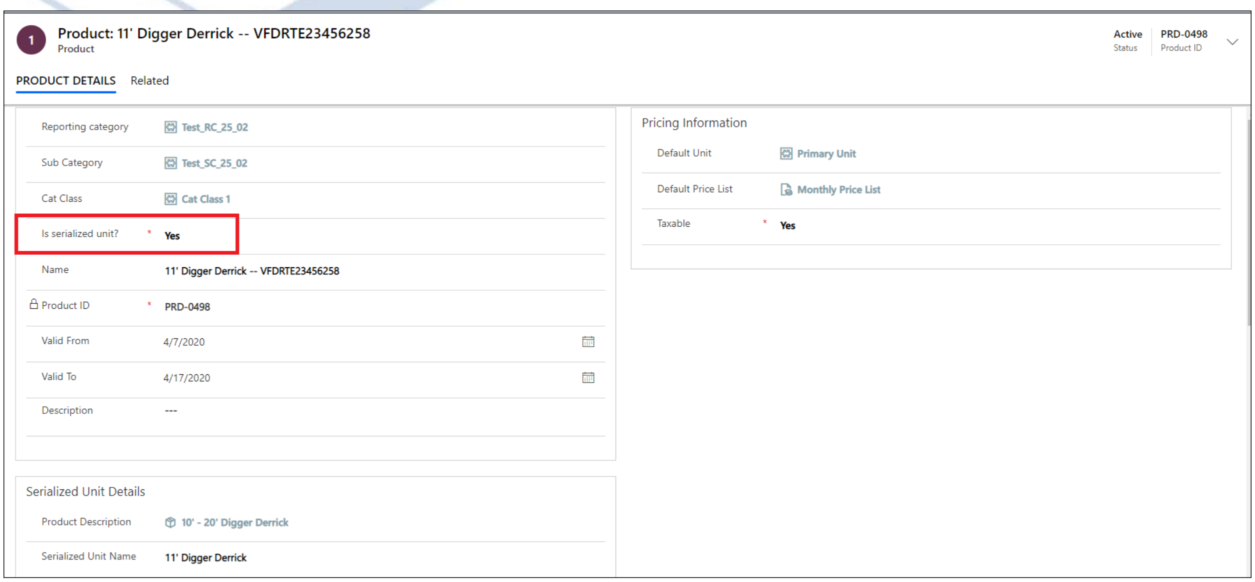
3.1 Product Creation

- First step is to access the Asset Management area, click on the products entity and from the header on select the ***Add Product***, and this will lead to a form.

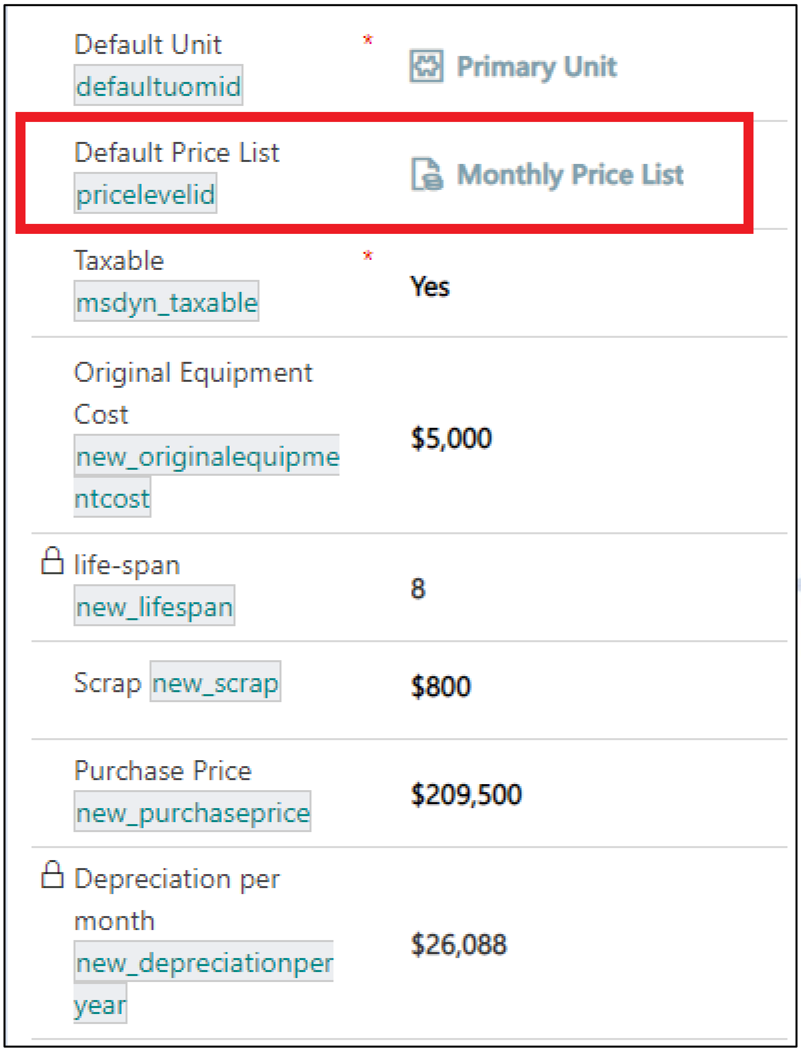




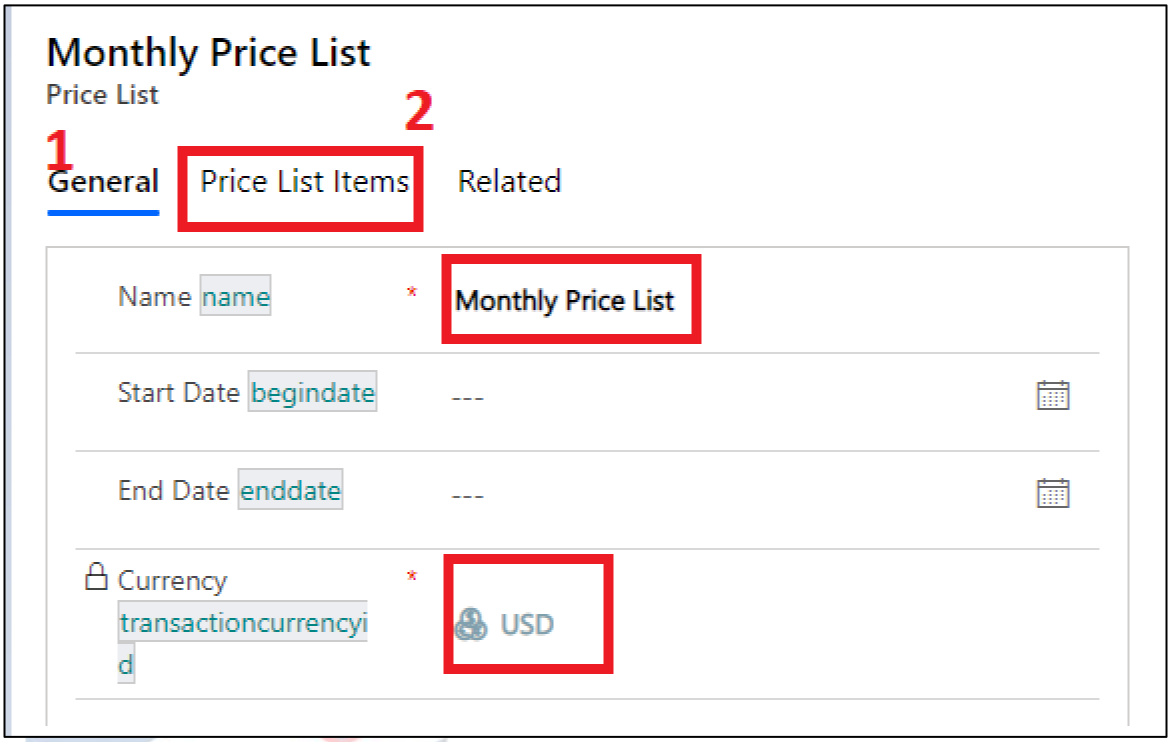
- On the form, enter the details like the product name, Product ID etc., if the product is a serialized unit enter its associated hierarchy levels like the Reporting Category, Subcategory, Cat Class and Product description. By default, the product will be in a draft state, once done will have to publish the product in order to use it against any reservation or rental contract.

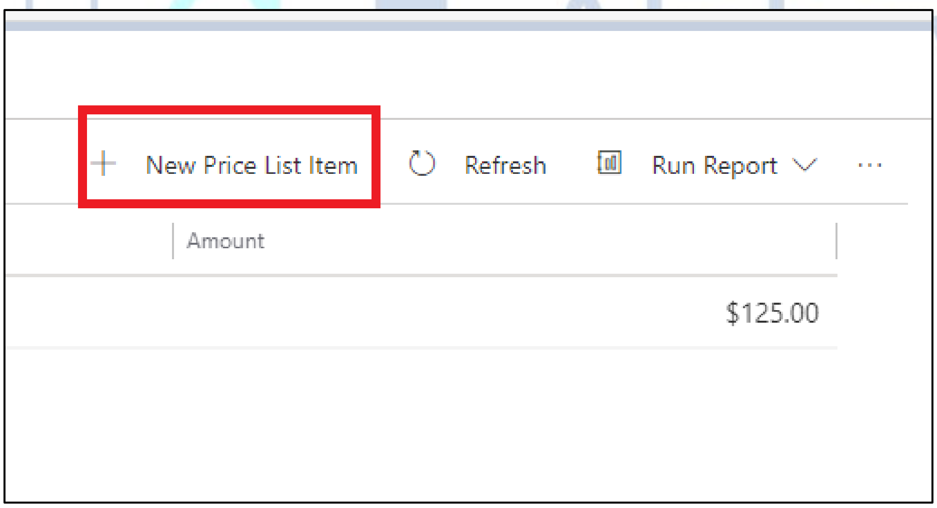


- Every product must be associated with a default unit, and price list alongside all the Serialized unit details should be entered as well.
  1. The life span of the product will be decided based on the Original Equipment Cost and the reporting category
  2. For the depreciation, this solution follows straight line depreciation calculated based on the Purchase Price, scrap value and the life span.

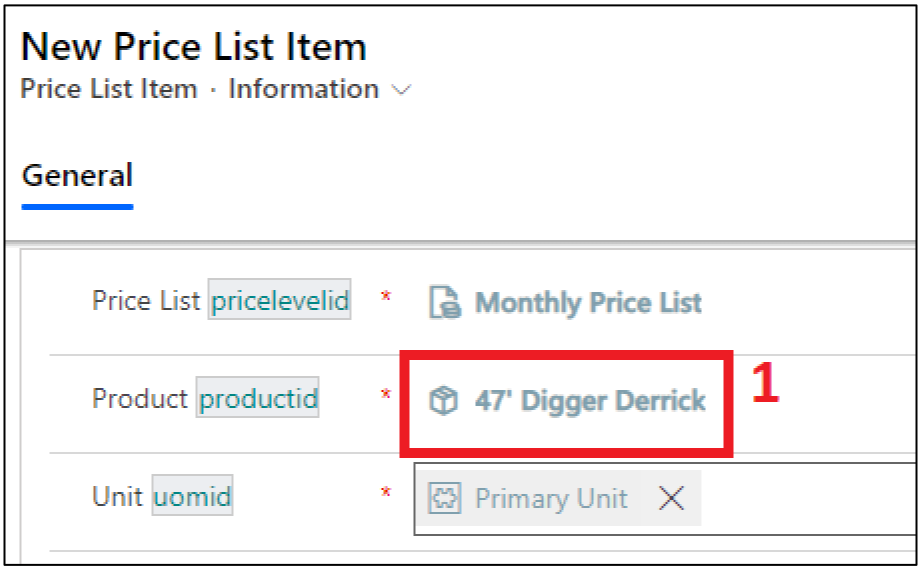


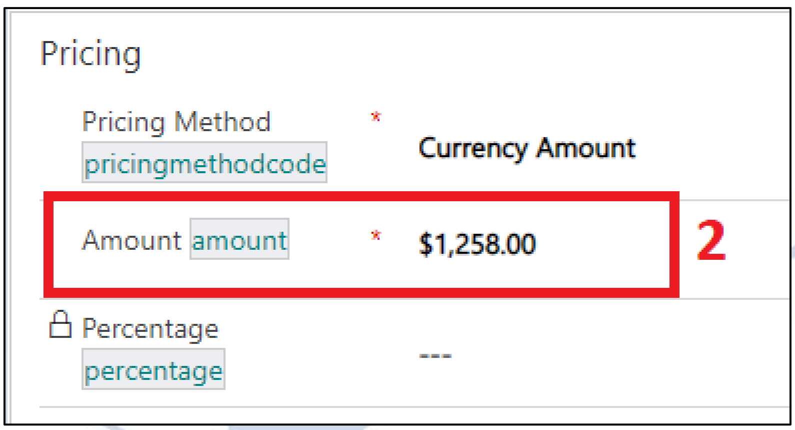
- Once the price list is associated, then select the price list, under general tab can view the currency the products are billed. Under the Price list items tab from the screenshots below select the new Price list item.



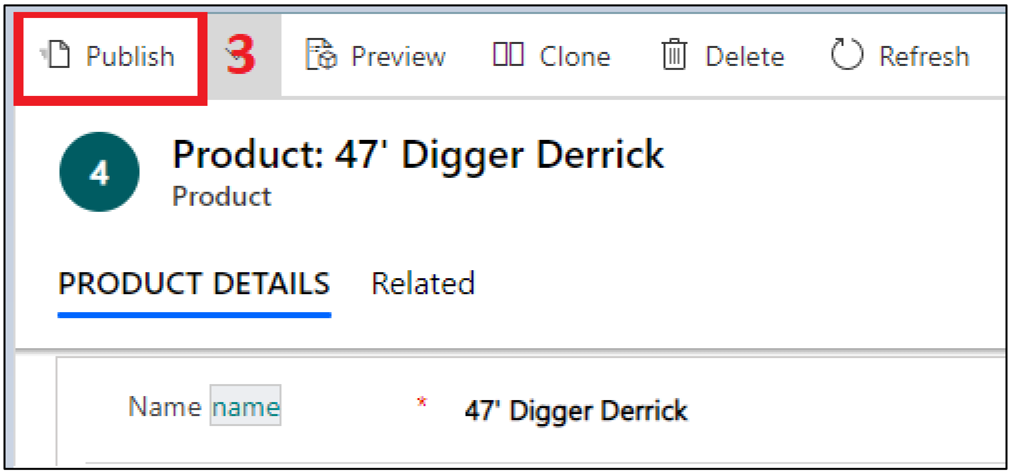


- Once the new Price list item is selected, enter the Product details like the product, unit and the pricing information.

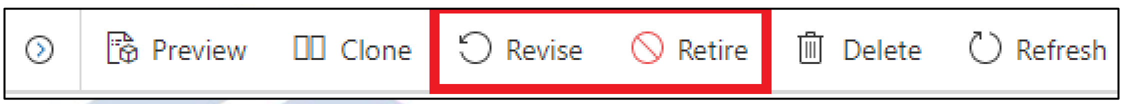




- Once the pricing information is provided, get back to the product and will have to activate the product. Clicking on Publish will activate the product and the product would be ready to be added into the rental contract.



- After the product is created, on the header of the product options like Revise and Retire will also be shown, to change the status of the product as per requirements.

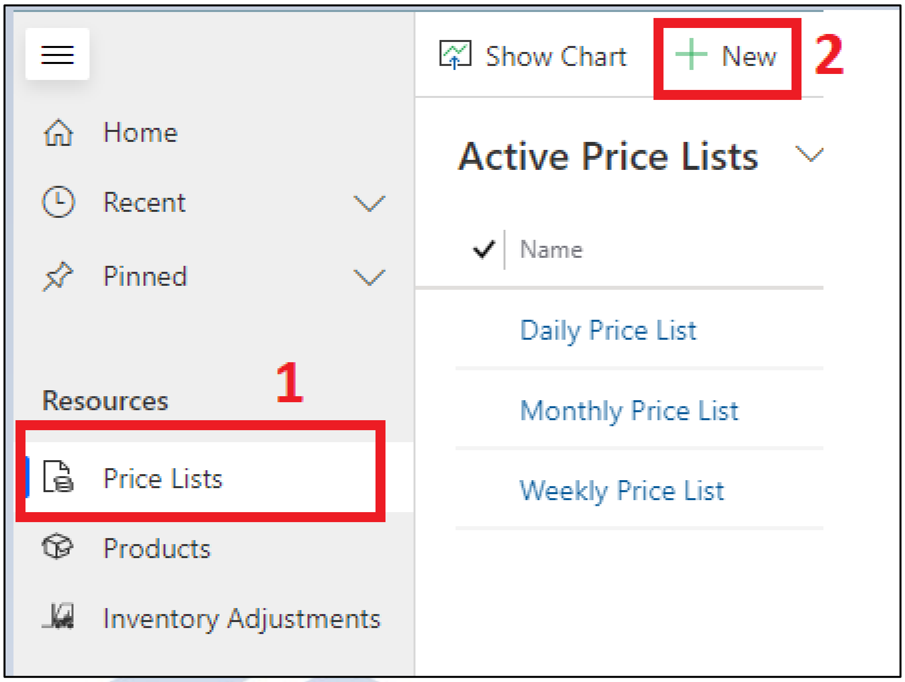


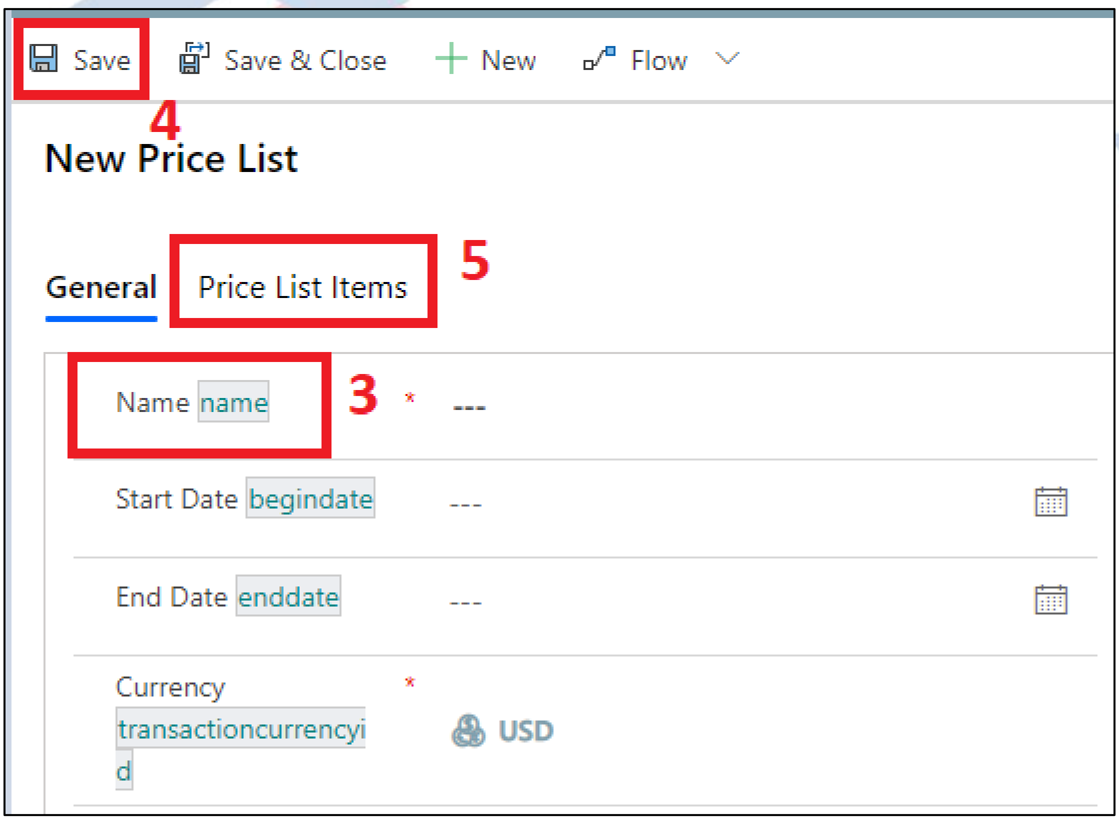
From the above screenshot,

1. Revise → will change the status to under revision and can't be used in the rental contract in this stage.
2. Retire → The product will no longer be active and can't be used in the rental contract.

3.2 Price List Creation

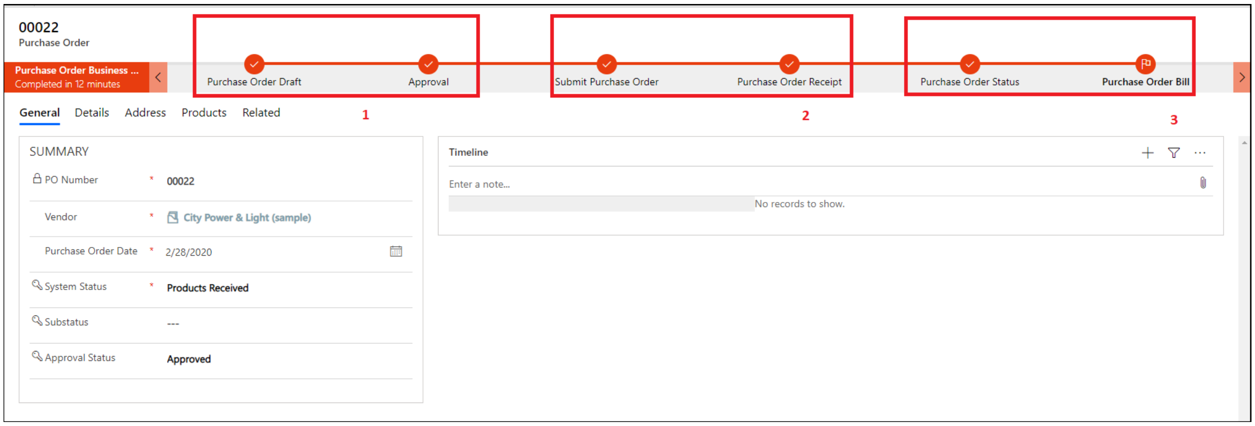
- Price list mainly holds the pricing information associated with each product.


Show Chart
New
2
Home
Recent
Pinned
Resources
1
Price Lists
Products
Inventory Adjustments
Active Price Lists
Name
Daily Price List
Monthly Price List
Weekly Price List

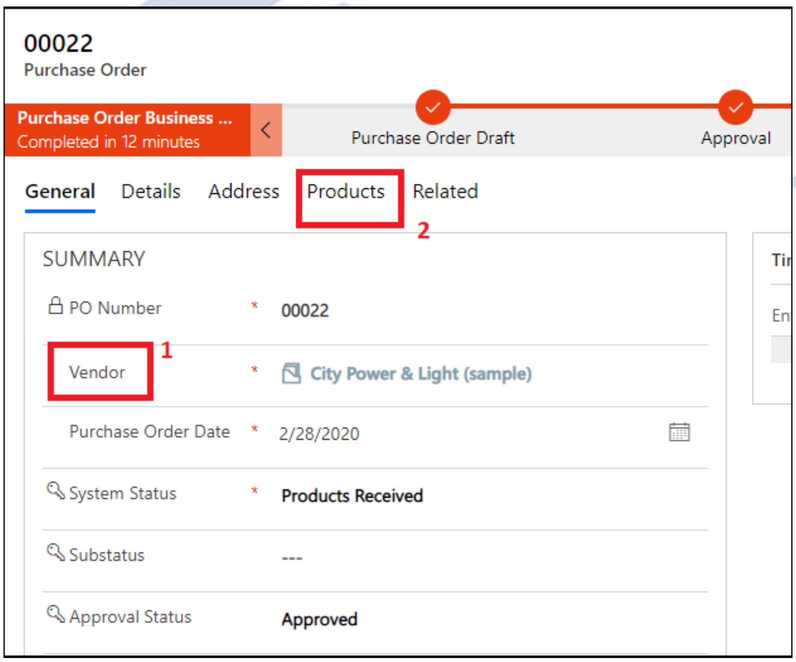

Save
Save & Close
New
Flow
4
New Price List
General
Price List Items
5
Name name
3
Start Date begindate
End Date enddate
Currency transactioncurrencyid
USD

3.3 Purchase Order

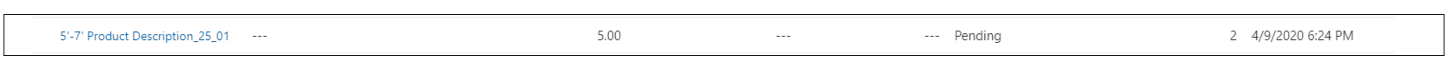
Purchase Order life cycle follows a Business Process Flow as shown below.



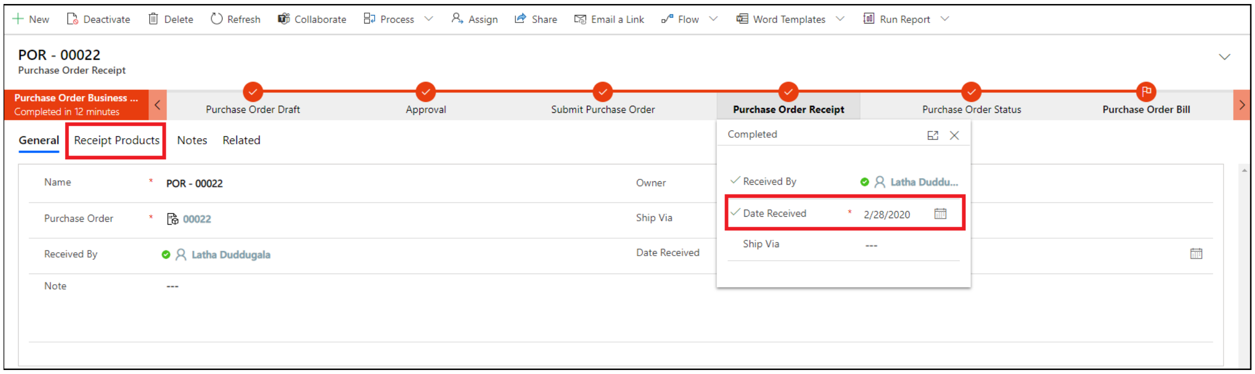
The first two stages are the Product Requisition stage, whereas when a product is requested, and a privileged person would approve the request.



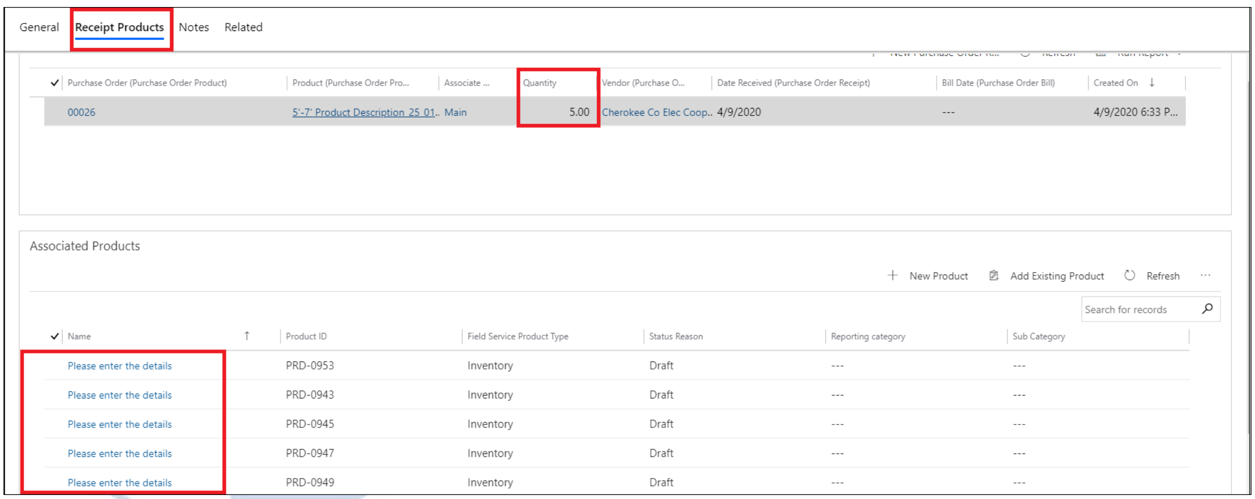
Enter the Vendor account from whom we are purchasing the product/equipment. In the Products tab enter the product description while requesting the products along with its quantity.



From the above screenshot, a request has been made for the product with a quantity of 5 and its in the pending status because its not received yet. While receiving the products that we have requested a record under the receipt products tab should be created.



If receiving all the 5 products then, 5 product records will be auto created as shown in the screenshot below and will have to enter the serialized units' details by opening each record and this will be auto updated in the inventory.



The last two stages of the BPF are the details of the associated with the payments for received products, where we can hold the invoice number that's related to this purchase from the vendor.