DYNAVISION

Documentation:
Rental and Consumption

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1 Introduction

Welcome to the official manual of the Dynavision Rental and Consumption module.

This extension makes it possible to automate the administration, billing and follow-up of rented equipment.
The availability overview makes it possible to view which rental items are in stock and which items are rented. When a reservation is made for rental items, the items are moved to a different stock and bin location, to make follow-up of where items are more easy.

It is also made possible to sell consumption items or consumable items together with the rental items. If during the rental period more consumables are needed, these can easily be added to the order and billed together with the other items.

When the goods are returned at the end of the rental period it is easy to calculate the used and not used consumables, even take into account the reimbursement for reusable packaging if applicable with monetary deposits and the rental fees.

2 Extension

2.1 Extension

The Dynavision Rental and Consumption module is a separate Business Central extension.
1. Choose the search icon, enter **Extension Management**, and then choose the related link.
2. Choose **Manage** in the Action bar on the page and choose action **Extension Marketplace**.
3. In the search bar, enter **Dynavision Rental and Consumption** and install this app.
4. Activate the trial as described in following **Get Started guide**.

3 Configuration

3.1 Event Setup

Choose the search icon, enter **Event Setup**, and then choose the related link.
This page contains some mandatory settings that needs to be set in order for the user to take advantage of all the features of this app.

1. **General**
   a. **Event Nos.**
      Specifies the number series that will be used to assign numbers to events.
   b. **Event Location**
      Specifies the code of the default event location.
   c. **Event Dimension Code**
      Specifies the dimension code for events in the analysis report.
      A new dimension will be created for each event.
2. **Invoicing**
   a. **Event Journal Template Invoice**
      Specifies the journal template that is used for posting sales invoices.
   b. **Invoice Standard Text Code Item Group**
      The standard text Code that is used when consumption items need to be invoiced. *This will add a comment line for the grouped consumption items on the sales invoice.*
   c. **Invoice Standard Text Code Reusable Packaging Group**
      The standard text Code that is used when Reusable Packaging items need to be invoiced. *This will add a comment line for grouped reusable packaging items.*
   d. **Invoice Standard Text Code Cost Group**
      The standard text Code that is used when rentable items need to be invoiced. *This will add a comment line for the grouped rentable items that will be included as a general ledger account line on the invoice.*
   e. **Event Invoicing Method**
      Specifies the method that will be used to invoice the items of the event.
      There are two options:
      i. **Standard**: the Base Unit of Measure will be used in order to invoice the item, and
      ii. **Advanced**: The Sales Unit of Measure will be used in order to invoice the item and there will be a conversion of the Unit of Measure that was inserted on the event for the item to this Sales Unit of Measure.
         Remark: it is possible that a second line will be created for the remaining quantity of the item in the Base Unit of Measure if this cannot be.
         - *For example: 3 full containers of beer and 20 individual bottles sold. With option default, the invoice will show 92 bottles. With advanced, 3 X bin 24 and 20 bottles will be included. This is especially important if the price per bottle of a bin is different than the normal price per bottle.*

  f. **Price From Cust. No.**
  Indicates the customer no. of the customer whose prices and discounts will be used as default.

3. **Deposit**

  a. **Cash Receipt Journal**
  Specifies the journal template that will be used for cash receipts.

  b. **Cash Receipt Batch**
  Specifies the journal template batch that will be used for processing cash receipts.

  c. **Deposit Reason Code**
  Specifies the Reason Code that will be added to the journal lines for processing and posting deposits.

  d. **G/L Account Deposit**
  Specifies the General Ledger Account that is used to post deposits.

  e. **Deposit Text Code**
  The standard text Code that is used when deposits are added on the invoice.

  f. **Refund Deposit Jnl. Template**
  Specifies the journal template that will be used for refunds of deposits.

  g. **Refund Deposit Jnl. Batch**
  Specifies the journal template batch that will be used for processing the deposit refund.

  h. **Deposit Payment Method**
  Specifies the payment method that is used for invoicing the event deposits. This functionality will only work in combination with Dynavision Trade.
  Remark: *the selected Payment Method has to have the same Bal. Account No. set up as the G/L Account Deposit field. This is to make sure that the deposit is correctly processed.*

4. **Reports**

  a. **Transfer Report ID**
  Specifies the ID of the report that will be used to print an event transfer order.

  b. **Transfer Report Name**
  Displays the name of the selected Transfer report.

  c. **Deposits Report ID**
  Specifies the ID of the report that will be used to print the overview of the deposits of an event.

  d. **Deposits Report Name**
  Displays the name of the selected deposits report.

  e. **Pick-up List Event Report ID**
  Specifies the ID of the report that will be used to print the pick-up list of items that need to be retrieved for the event.

  f. **Pick-up List Event Report Name**
  Displays the name of the selected Pick-up List event report.

4 Rentable items

On the **item Card** following option is added by Dynavision Connect, **Item Type**.

1. **Item Type**
   Indicates the Item Type. *By default*, an item will have the item type **normal**. Items that are rentable need to have the Item Type **Rentable**. Items with the item type **Rentable** can have a linked Rentable Item that will be used for invoicing of these items.

The reasoning behind creating the **Rentable** item type is to be able to take back these items when the event is completed.

If this was a normal item type, and we transfer this item from the virtual location to the stock location of the company after completion of the event, this item would not be included in the invoice that is generated for this event.

If the item would not be transferred from the virtual location and the invoice is generated, the stock of this item would be reduced, while the item is in fact returned and still in stock in the company stock location.

To address this, the item type **Rentable** was created, to which a linked Rentable item can be attached.

In order to correctly process the rentable items, two items need to be created:

1. An item with **Type Inventory** and **Item Type Rentable**, that is used to track the availability of the rentable items, and
2. An item with **Type Service** and **Item Type Normal** that will be used to charge the rentable item on the invoice for the event.

These items need to be linked.

When generating the invoice for the event, the Rentable item will be swapped with the service item.

4.1 Setting up a Rentable item

1. In the **Item Tab** following field needs to be set:
   a. **Type**: select Inventory.
2. In the **Item Type Tab** following needs to be configured:
   a. **Item Type**: select Rentable.
   b. **Linked Rentable Item No.**
      The service item that will replace the Rentable item on the invoice of the event. *Only service items can be selected.*

Remark: On the Rentable item no price is defined. This price is defined on the service item that will be inserted on the event invoice instead of the Rentable item.

4.2 Setting up the Linked Rentable Item

1.   In the **Item Tab** following field needs to be set:
     a.   **Type:** select Service.
     b.   **Base Unit of Measure**: It is best practice to choose the Unit of Measure Hours or days. This way it is possible to enter the amount of days or hours that the Rentable item was used for the event when invoicing the item.
2.   In the **Item Type Tab** following needs to be configured:
     a.   **Item Type**: select Normal.

Enter the unit price or add the price to the sales price list in order to invoice the item on the event invoice.

5 Setting up the Event Location

1.   Choose the search icon, enter **Locations**, and then choose the related link.
2.   Choose the action **New** to create a new location that will be used for events.
3.   Make sure following options are set up:
     a.   **General Tab**
          i.   **Event Location**
               Specifies if this location is used for events. This needs to be enabled.
     b.   **Warehouse Tab**
          i.   **Bin Mandatory**
               This needs to be enabled. For each event, a new bin will be created that will be used to store the items that are transferred on the Event Card for this event.

6 Managing an Event

6.1 Tracking the Rentables Availability

1. Choose the search icon, enter **Rentables Availability**, and then choose the related link.
2. The page that opens shows an overview of the rentable items and the inventory of these items.
   a. **Starting Date**
      The Starting date of the event in order to check if the Rentable items are available.
   b. **Location filter**
      Here you can specify the location for which the inventory should be shown. If left blank, the inventory over all locations will be shown.
   c. On the **lines** below these fields, an overview is shown of the different Rentable items (item type Rentable) With their information and the availability of the items on each day during a month, starting from the entered Starting Date.

It is possible to check the Item availability in each location that has been set up in the tenant for a Rentable item in the overview .
Select the item from which the availability per location needs to be checked and choose the action **Item Availability by Location** that can be found when clicking on **Related**.

1. **View by**
   Here you specify over which period the amounts will be grouped when displaying.
   The options are:
   a. Day,
   b. Week,
   c. Month,
   d. Quarter,
   e. Year, and
   f. Accounting Period.
2. **View as**
   This specifies how the amounts have to be displayed.
   a. **Net Change:** the change in the balance for the selected period,
   b. **Balance at date:** the balance on the last day in the selected period.
3. **Date Filter**
   This field will be filled in depending on the **View as** that is chosen. *E.g. starting date 14/07/2023, select view by Week, date filter will be set to 10/07/23..16/07/23.*

6.2 Event List

A new event can be created through the **event List** page**.**

1. Choose the search icon, enter **Event List**, and then choose the related link.
2. Choose the action **New** to create a new event. *Remark: it is also possible to easily navigate to the* ***Rentables Availability*** *page from the Event List page by choosing the action* ***Availability*** *in the Action Bar.*
3. Fill in the necessary field for the event.
4. **The General Tab**
   a. **Event No.**
   The number of the event, using the number series that is set in the Event Setup.
   b. **Description**
   The description of the event.
   c. **Description 2**
   The second description of the event.
   d. **Creation Date**
   The date when the event was created.
   e. **Starting Date**
   The starting date of the event. The starting date is the day on which the items should be delivered.
   f. **Ending Date**
   The ending date of the event. This is de day on which the unused items, reusable packaging and or rentable items should be picked up.
   g. **Sell-to Customer No.**
   The customer that hosts the event.
   h. **Sell-to Customer Name**
   The name of the customer who hosts the event.
   i. **Stock Location Code**
   The stock location from which the goods will be transferred to the event.
   j. **Rental Location Code**
   The stock location from which the Rentable Items will be transferred to the event. *By default the stock location code will be filled in.*
   k. **Event Location Code**
   The virtual location code where the rentable and consumable items need to be transferred to. These items will be virtually stocked on this event location for the duration of the event.
   l. **Event Bin Code**
   This is an automatically created bin location in the Event Location. This will be automatically filled in and will be named after the Event No. This location will contain the items that were delivered to the customer for the event, and when the items are returned, a transfer order will be created from this location to the stock location and/or rental location. The invoicing for the event will use the items on this virtual location to determine which items need to be added on the invoice.

    m. Status

        Indicated the status of the event. When the status is set to active, certain actions will become available for the event, it is also not possible to delete the event in case the status is active.

    n. Quote No.

        If the event is based on a sales quote, the quote number from which this event is created will be shown in this field.

    o. Lines

        Add the items that are requested for the event by the customer. These are the items that will be transferred and possibly consumed.

        i. Item No.

           The item Number of the item that is needed for the event.

        ii. Description

           The description of the item.

        iii. Invoice rentable

           Is available when a Rentable item is selected. This needs to be checked in order to swap the Rentable Item with the linked Service item. *Linked on the item card of the Rentable Item.*

        iv. Quantity

           The quantity that is needed of the item.

        v. Unit of Measure Code

           The Unit of Measure Code of the selected item.

        vi. Quantity to Transfer

           The quantity of the selected item that still needs to be transferred to the customer (event location bin).

        vii. Quantity in Transfer Order

           The quantity of the item on a transfer order generated for this event. *This can be generated when the event status is active, using the action **Delivery…***

        viii. Quantity Transferred

           The quantity of the item that has been transferred to the virtual bin created for this event. *These items are delivered to the customer.*

        ix. Quantity in Event Location

           The quantity of the item that is stocked in the virtual event bin in the event location.

5. **Shipping and Billing Tab**

    a. Insert the information for the shipping and billing of the event.

There are a number of **actions** that can be executed on the **Event Card** when the **Status** is set to **Active**.

1. **Home**

    a. Delivery…

        This action will create Transfer Order(s) to move the items from the Stock Location and/or the Rental Location, specified in the fields **Stock Location Code** and **Rental Location Code**, to the event location.

  b. Return...
  This action will create Transfer Order(s) to move the items from the Event location to the stock location or Rental location specified in the fields **Stock Location Code** and **Rental Location Code**.

  c. Invoice...
  Create a new invoice for this event, based on the items that are left in the current event bin.

  d. Availability
  Opens the **Rentables Availability** page for the Rentable items on the lines of the event. The location filter will be set to the selected location for the event. *Remark: this action is also available when the event is in concept phase.*

  e. Deposit
  Post a deposit for this event. When choosing the action, the **Post Deposit** screen opens, in which the amount of the deposit can be inserted and the payment method can be chosen. It is possible to post the deposit immediately by enabling the option **Post**. When disabled, the **General Journals** page will open in which the deposit can be posted.

  f. Refund Deposit
  Post a refund of a deposit for this event. When choosing the action, the **Post Refund Deposit** screen opens, in which the amount of the refund can be entered and the payment method can be chosen. *This amount will be default filled in with the deposit that was received for this event, and the amount of the refund cannot be more than the received refund.* The type of refund can be chosen: **Direct** or **Delayed**. It is possible to post the refund immediately by enabling the option **Post**. When disabled, the **General Journals** page will open in which the refund can be posted.

2. **Reports**

  a. Deposits
  Print an overview of the deposits.

  b. Pick-up List
  Print an overview of items that needs to be picked up.

3. **Related > Documents**
 (also available in the factbox pane in the Documents Factbox)

  a. Transfer Orders
  View related Transfer orders.

  b. Shipments
  View related Posted Transfer Shipments.

  c. Receipts
  View related Posted Transfer Receipts.

  d. Direct Transfers
  View related Posted Direct Transfers.

  e. Sales invoices
  View related Sales Invoices.

  f. Posted Sales Invoices
  View related Posted Sales Invoices.

  g. Deposits
  View an overview of the posted deposits for this event.

6.2.1 Delivery of items to the customer

As described in the section above, the items can be delivered to the customer using the action **Delivery…**

By choosing this action, **(a) transfer order(s)** will be created to move the items **from the Stock Location** and/or **the Rental Location to the virtual Event Location**.
If there is no **In-Transit Code** defined on the Transfer Route, A direct Transfer will automatically be created. *The Quantity in Transfer Order will be updated on the event card for the items on the Transfer Orders.*

If the items are in multiple locations e.g. Stock and Rental Location, 2 transfer orders will be created. One Transfer order will be created to move the items that are located in the Stock Location to the Event Location and one Transfer order will be created to move the items that are located in the Rental Location to the Event Location.

The created Transfer Order will automatically be opened. If multiple Transfer Orders are created for the event an overview will be opened with the created Transfer Orders.

On the transfer order where items are included with linked Reusable Packaging, these Reusable Packaging items will also be added on the lines or the Transfer Order.

If a warehouse flow is set up, the transfer order will always show the address of the location where the items need to be delivered.

After posting the Transfer Orders that were created for the event, the **Quantity in Event Location** will be updated in the event card and will show the items that are transferred to the event location.
The quantities are always displayed in the Base Unit of Measure. *Example given, for Jupiler this is FLES (20 containers = 480 bottles).*

In the Factbox on the events page, an overview of the documents already created for this event is displayed and the booked document can be accessed.

6.2.2 Return of the items from the customer

Once the event is completed, items that have not been consumed and the rental items need to be retrieved.

As described in the section above, the items can be delivered to the customer using the action **Return...**

By choosing this action, **a transfer order** will be created to move the items **from the Event Location** to **the Rental Location** and or **to the Stock Location**.
If there is no **In-Transit Code** defined on the Transfer Route, A direct Transfer will automatically be created. *The Quantity in Transfer Order will be updated on the event card for the items on the Transfer Orders.*

In the Transfer order, there are two options to note the items that will be returned in stock:

1. The returned items can be entered **manually**
2. Choose action **Get Bin** Content from the Action bar. The function can be found by clicking Actions, functions. This function will retrieve the items that were delivered to the customer for the event. This can be adjusted to what was actually received.
   When retrieving the content, following needs to be specified:
    i. **Split lines** Here you can specify that the items being retrieved be split into different lines.
    Example: *Jupiler 0.25/ basic unit = FLES/ sales unit = BAK 24*
    There are 30 bottles in the BIN.
    If split is turned on with base unit:
    1 line of 30 FLES will appear on the transfer order
    If split is turned on with sales unit
    2 lines are inserted
    1 X BAK 24
    6 X FLES
    ⇨ Recalculations are made to insert the largest possible number of BAK 24, and then supplement with the remaining number of basic units .
3. **Disable: Add empties**
   By checking this option, only empties from the storage location will be inserted into the lines.
   If this field were unchecked, the Reusable Packagings would be re-linked to the normal item and the Reusable Packaging would be included twice.
   It is important that this checkbox is always enabled in this case.
4. If not all consumable items are consumed, and a part of the items need to be returned, when releasing the transfer order, it is possible that a message is displayed indicating that the stock needed of Reusable Packaging does not match the stock that is available on the event bin location.
5. A page opens in which it is possible to perform a split in order to have the correct amount of Reusable Packaging available to post the transfer.
   The page shows the lines in the document that can be split, the number that is available in the event bin and the quantity noted on the transfer order.
    i. **Quantity to Split**
    In this field, the quantity is entered of the Reusable Packaging item that needs

to be split at the even site in order to have sufficient Reusable Packaging items of the BOM components of this item to receive the transfer.

    ii. **Split BOM**
By choosing this action, the inventory in the event bin location will be updated.

    iii. **Split Free**
By choosing this action, a new page opens. In this page, the reusable packaging items can be specified in which the main line needs to be split, together with the quantities of the underlying reusable packaging items. The balance of the value should become 0, and once this is the case, the split can be posted.

6. **Release** the transfer order again and post to receive the not consumed items. The remaining items in the bin location of the event are the items that need to be invoiced.

6.2.3 Deposits

It is possible to receive and refund deposits on an event. This can be done on the Event Card.

1. Choose the action **Deposit** in orde to receive and register a deposit for the event. Th option **Post** will post the deposit immediately after choosing **OK**. Otherwise the Deposit will be transferred to the Payment Journal, set in the Event Setup, and will set the G/L account to the G/L account specified on the Event Setup for the Deposit.

    a. Specify the amount of the deposit and the payment method that was used to receive the deposit from the customer.

    b. Choose **OK**.

2. It is possible to view an overview of the deposits for an event, by choosing the action **Deposits**, via **Related, Documents**. The information is also visible in the fact box in the fact box pane in the field **Deposit Amount**. Choose the value to navigate to the list of deposits.

After a deposit is posted for the Event, it is also possible to register a refund, by choosing the action **Refund Deposit.**
The same options and fields as the Deposit registration are available to fill in, and the possibilities have been added to specify the **Type** of the refund.
The options are:

- **Direct**
The refund is immediately posted and deducted from the Deposit G/L account.
- **Delayed**
The refund is deducted from the Deposit account, and a Customer Ledger Entry, type payment, is created for the amount. This needs to be matched to the invoice for the event in order to complete the posting and close this entry.

6.2.4 Invoicing the event

Once the event is completed and the not consumed items are retrieved, the invoice needs to be created.
The invoice can be created using the action **Invoice...**

By choosing this action, a new invoice for this event will be created, based on the items that are left in the current event bin. If Dynavision Trade is installed, a check will be performed to see if there is a remaining amount on the Deposit G/L account for the event. If yes, a linked payment will be created, using the Payment method specified in the Event Setup and linked to the created invoice. This will make sure that the remaining amount on the Deposit G/L account is set to zero.

In case no Dynavision Trade is available on the environment, the Refund will need to be manually processed on the event.

Remark: when no payment date is specified while creating the Payment Records, the work date will be used instead.

A number of important fields are visible on the created invoice:
1. **Comment lines**
   On the invoice there is a grouping of the different types of items, consumed items, reusable packaging items and rentable items.
   These are the three text codes that were set up in the **Event Setup**.
2. The quantities shown on the invoice lines are the quantities of the items that remained in the event location bin, and thus effectively consumed. The Rentable item is replaced with the linked Service item.
3. **Unit of Measure Code**
   The Unit of Measure Code will be used according to the setup that is specified in the **Event Setup** page, in the field **Event Invoicing Method**.

6.2.5 Closing the event

After all steps (described above) are completed, the event Status can be set to closed on the Event Card.

Remark: the event can only be closed if the deposit G/L account for that event has no remaining amount. Otherwise this needs to first be settled by creating a refund, either direct or delayed.

7 Sales Quote to Event

Dynavision Rental and Consumption added the possibility to create an event straight from a Sales Quote. All information that is noted on the quote will be transferred to the Event that is created.
1. Create a **Sales Quote** and add all necessary information.
2. Choose the action **Create Event…** to create an event from the Quote.
   a. *Remark: this action will create an Event based on the Sales Quote. Just like making an order from the quote, the quote will be deleted and archived. On the created event, a link to the Quote is created. The quote can be accessed by choosing the value in the field **Quote No.** on the Event page.*
3. On the Event that is created, all information is taken over from the Sales Quote, such as the **Location**, invoice details, sell-to-customer No. and the lines from the document.
   a. The Order Date of the quote will be filled in as Starting Date for the event. The Quote Valid To date will be filled in as Ending Date on the event.