

TEMA-SYSTEMS.COM

# RENTAL MANAGEMENT SYSTEMS

FOR  
SAGE X3

CONSTRUCTION | AUTOMOBILE | HEALTHCARE | OIL & GAS | REAL ESTATE







## CONSTRUCTION

Building Materials, Cranes, Forklifts, Pumps, Scaffolding...



## TRANSPORTATION & LOGISTICS

Containers, Trucks, Railcars, Cars, Engines...



## HEALTHCARE

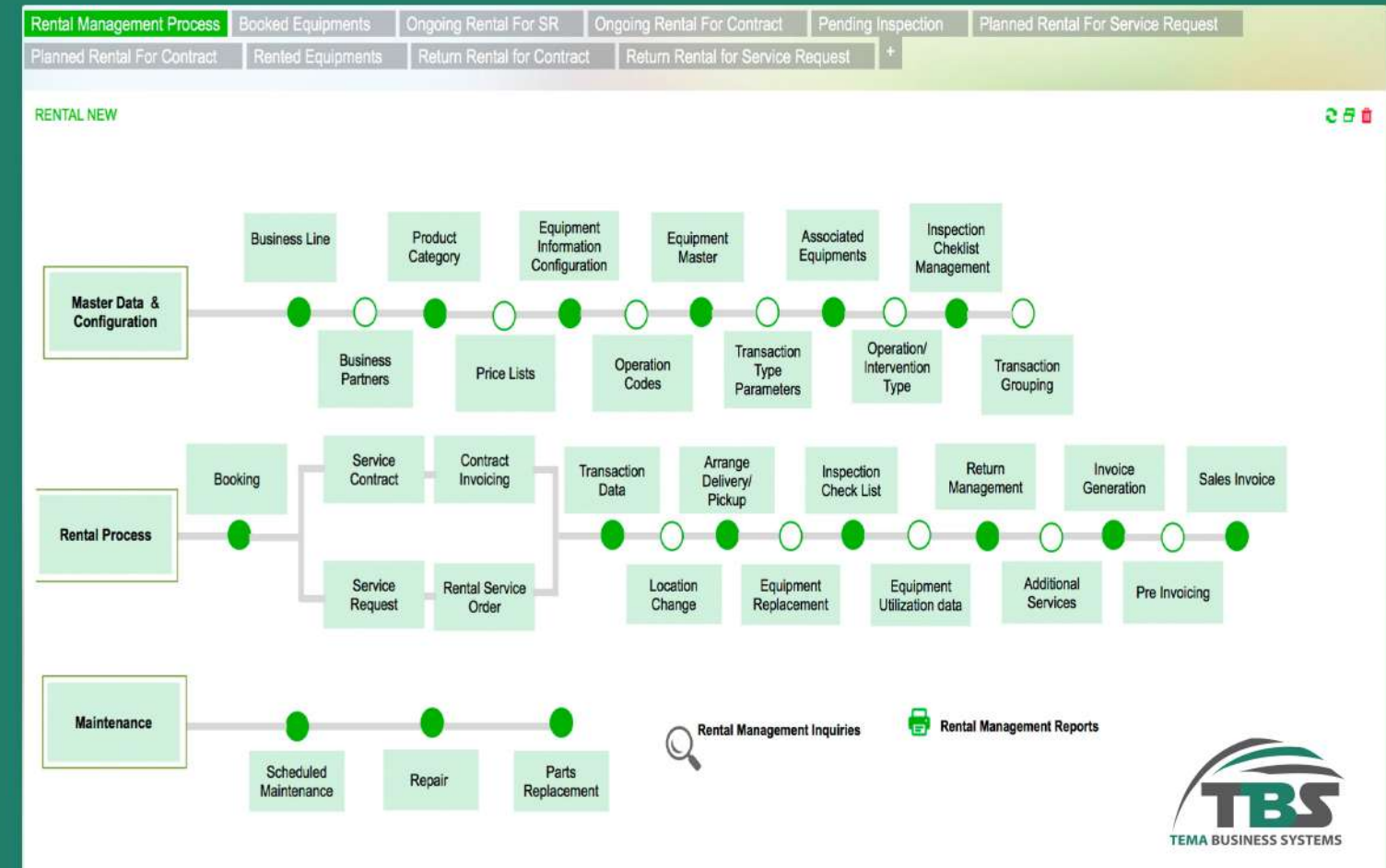
Medical Instruments, Scanners and Monitors, MRIs...



## OIL & GAS

PetroChem storage capacity rentals in Tank Farms and Warehouses...

Visual Process driven processes for Booking, Rental, Contract, Billing and Maintenance activities.



## FULLY INTEGRATED INTO SAGE X3

Developed as a business add-on, the solution is fully integrated into Sage X3 with real time interaction with standard modules.



## KEY FEATURES :

Rental Management System for Sage X3 provides an integrated suite of modules that meet the needs of rental specialists. Providing visibility into your equipment, inventory, contracts, customers, financials, and business processes allow you to provide high levels of service to your customers.

ASSET  
DATA  
CONFIGURATION

PRODUCT  
CATEGORIES  
BUSINESS LINES

ACCESSORIES  
KITS  
CONSUMABLES

CONTRACT  
DRIVEN  
RENTALS

**RENTAL  
ASSET  
MASTER**

QUOTES  
BOOKING  
RESERVATION

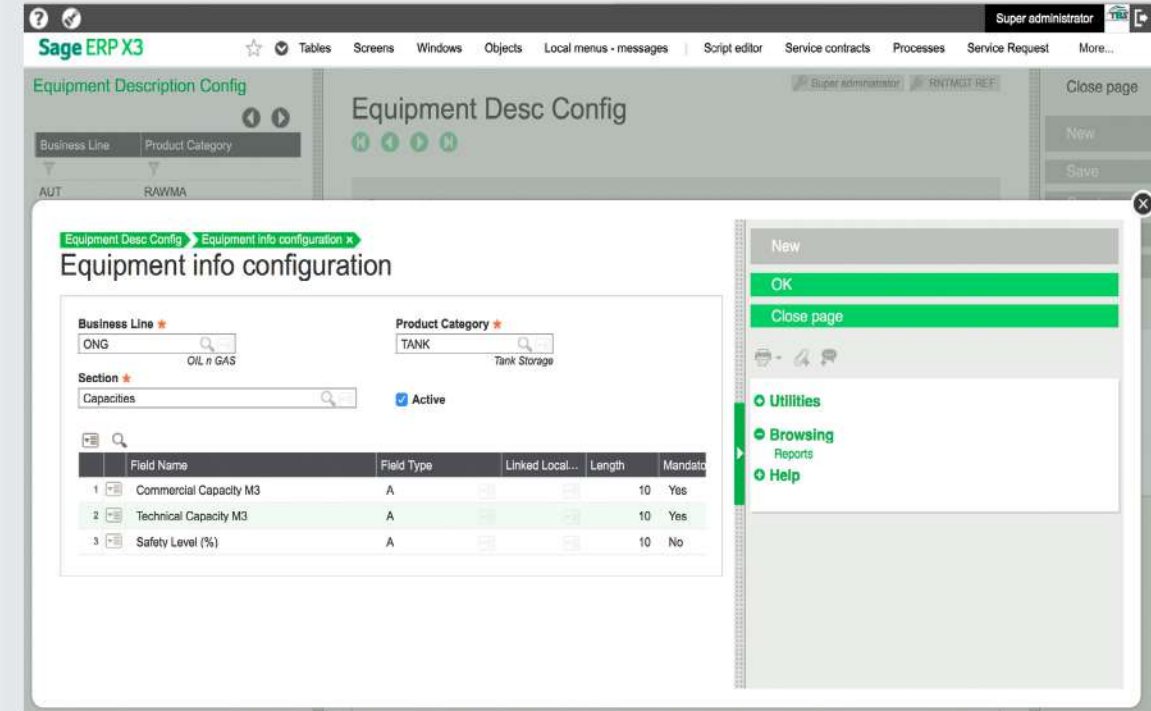
SERVICE ORDER  
DRIVEN  
RENTALS

CONFIGURABLE  
INSPECTION  
CHECKLISTS

PREVENTIVE  
CORRECTIVE  
MAINTENANCE

BUDGETS  
&  
COST FOLLOW UP

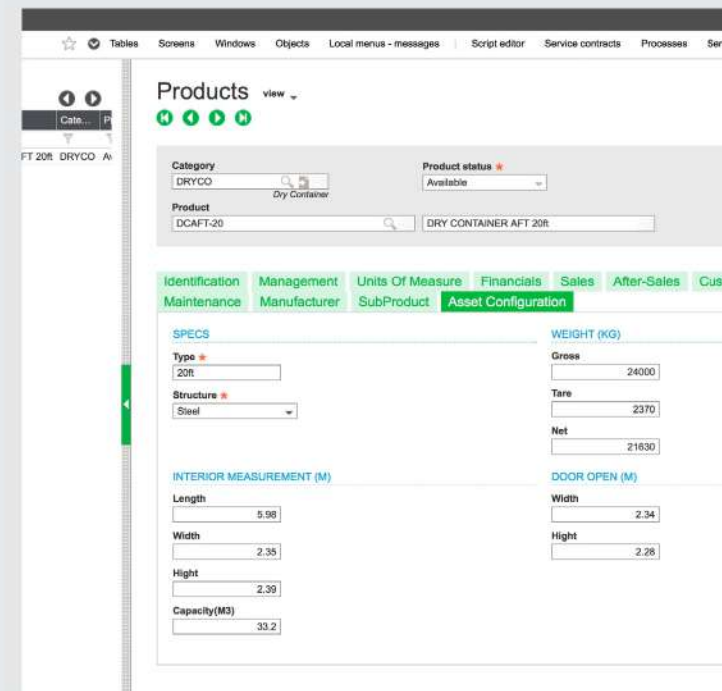
OPERATIONAL  
FINANCIAL  
ANALYTICS



The screenshot shows the 'Equipment Desc Config' window in Sage ERP X3. It includes a 'Business Line' dropdown set to 'ONG' and a 'Product Category' dropdown set to 'TANK'. Below these are fields for 'Section' and 'Capacities'. A table lists configuration fields:

	Field Name	Field Type	Linked Local...	Length	Mandato
1	Commercial Capacity M3	A		10	Yes
2	Technical Capacity M3	A		10	Yes
3	Safety Level (%)	A		10	No

On the right, there is a 'New' button, 'OK' and 'Close page' buttons, and a sidebar with links to 'Utilities', 'Browsing', 'Reports', and 'Help'.



The screenshot shows the 'Products' screen in Sage ERP X3. It includes a 'Category' dropdown set to 'DRYCO' and a 'Product status' dropdown set to 'Available'. Below these are fields for 'Product' and 'Product description'. The screen is divided into several sections:

- Identification**: Includes 'Type' (20ft), 'Structure' (Steel), and 'Weight (KG)' (Gross: 24000, Tare: 2370, Net: 21630).
- Interior Measurement (M)**: Includes 'Length' (5.98), 'Width' (2.35), and 'Height' (2.39).
- Capacity (M3)**: Includes 'Capacity (M3)' (33.2).
- Door Open (M)**: Includes 'Width' (2.34) and 'Height' (2.28).

## RENTAL ASSET DATA CONFIGURATION

Each Rental industry has to manage various types of assets (vehicles, containers, construction machines, tanks, generators...), it is essential to capture the most relevant descriptions and characteristics of your rental assets.

Rental Management Systems for Sage X3 is packaged with powerful and robust features to dynamically design your rental Asset Data Configuration, by allowing you to create type of assets, configuration sections and detailed fields with control types.

As a result, rental Asset Master screens are automatically adapted for each type of asset and let you capture information that is most relevant for your asset types.



# CONTRACT DRIVEN RENTALS

Rental Contract is performed through a quotation, contract creation and associating rental assets to contract :

- Asset, Equipment, Accessories that are to be rented,
- Services required - set up, delivery, servicing, and etc.
- Additional items to be sold, such as consumables
- Terms of contract - Pickup or Delivery Management, rental dates, renewal policy and invoicing periodicity and price determination rules.

Rental business processes may vary per industry and asset types.

Rental Management System for Sage X3 offers very adaptive business processes that best fit your industry requirements.

Some rental processes are contract centric while others are service order centric.

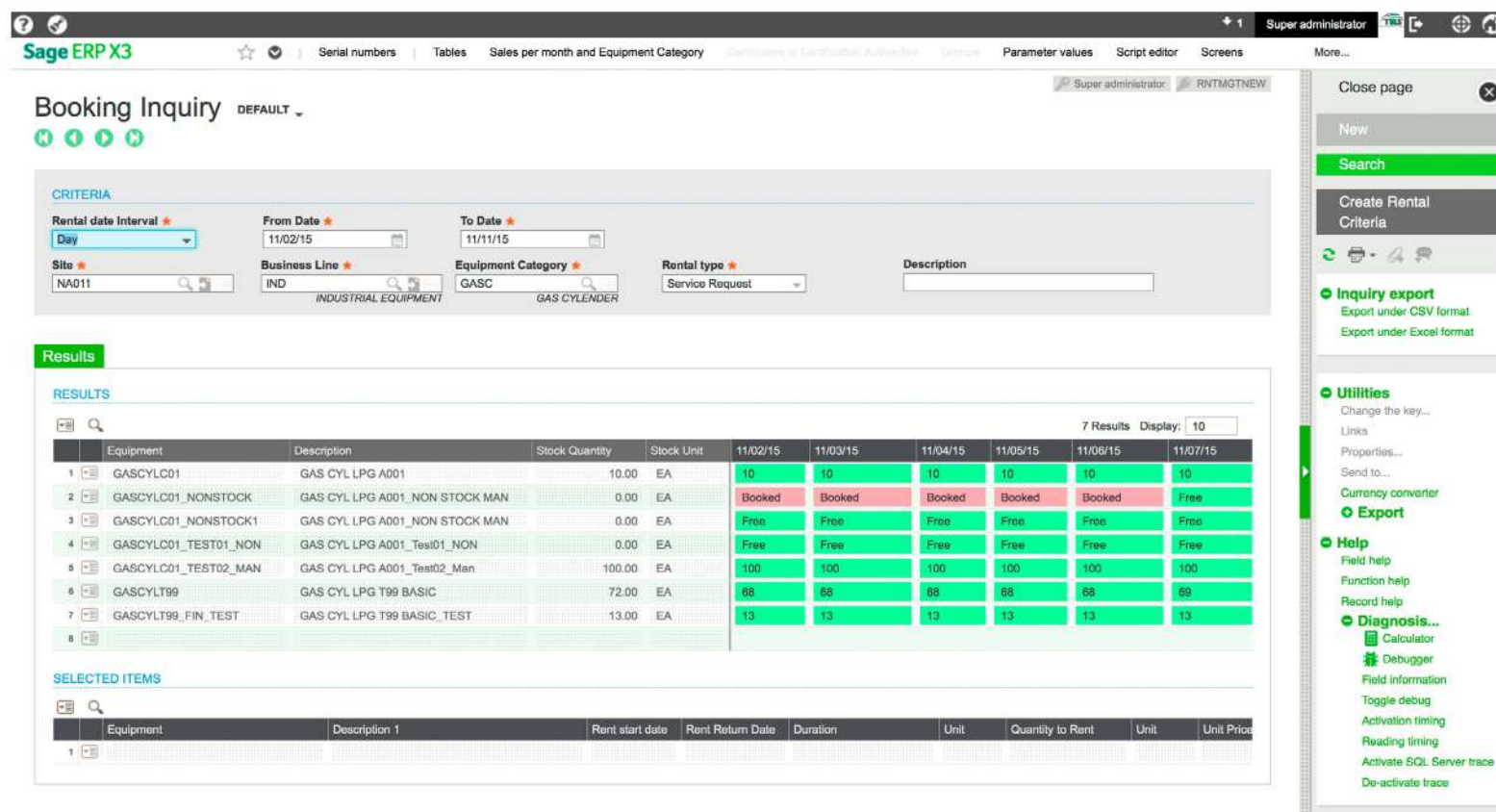
These are essentially rentals for mid and longterm duration with specific contractual terms for pricing, services and maintenance policies.

Drive your rentals through contracts, or service orders or both.

# SERVICE ORDER DRIVEN RENTALS

Service Order is performed through a booking process and specifies below information :

- Assets / Equipments
- Accessories and consumables as suggested by the system
- Rental dates per asset
- Billing Overview and confirmation
- Pickup / delivery addresses
- Expected return collection location, date and time
- Service Order and rental terms document
- Inspection Checklist



**Sage ERP X3** Super administrator

Serial numbers | Tables | Sales per month and Equipment Category | Certificates of Certification Authorized | Windows | Parameter values | Script editor | Screens | More...

Booking Inquiry DEFAULT

CRITERIA

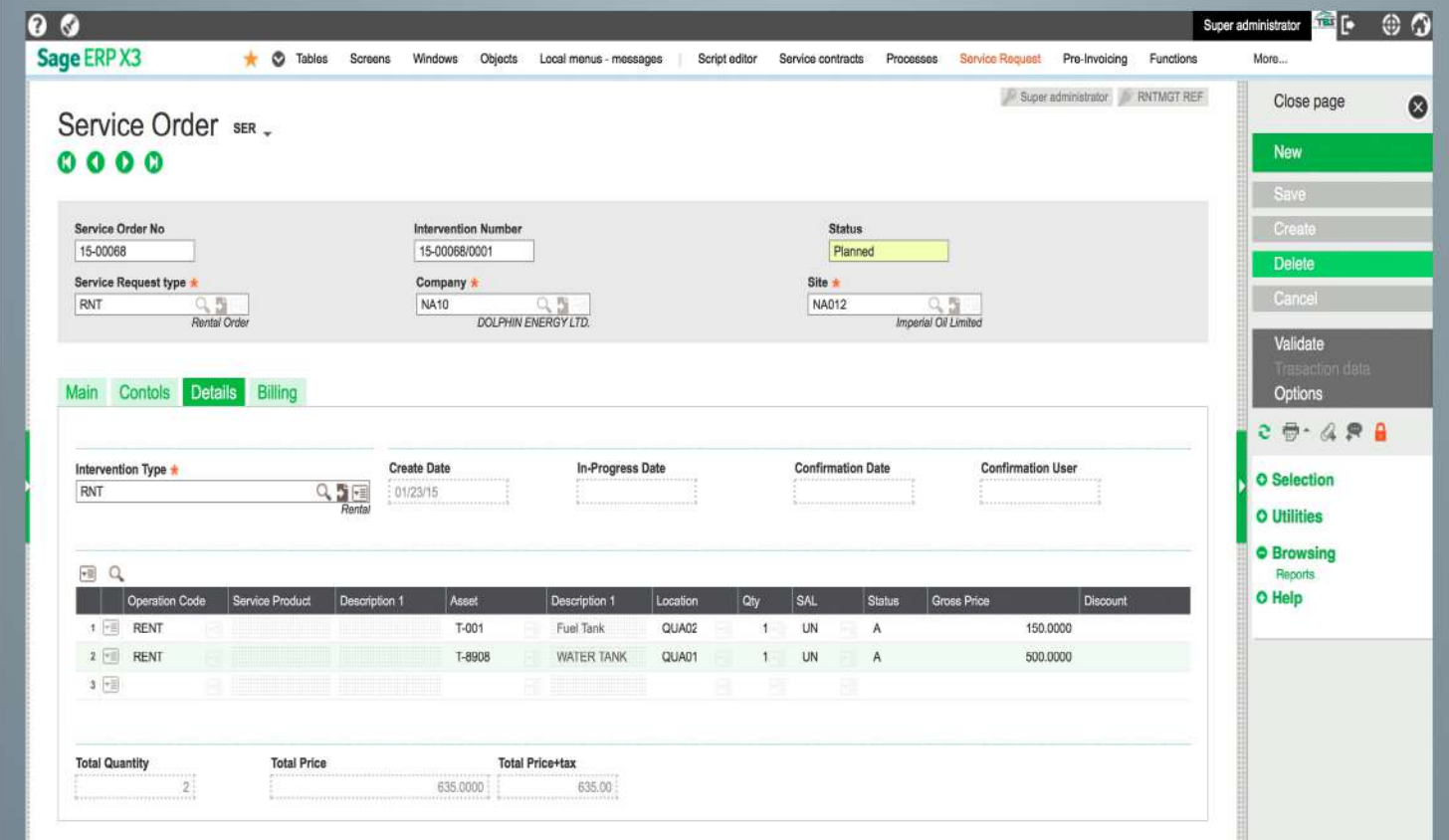
Rental date interval: Day  
From Date: 11/02/15  
To Date: 11/11/15  
Site: NA011  
Business Line: IND  
Equipment Category: GASC  
Rental type: Service Request  
Description:

RESULTS

Equipment	Description	Stock Quantity	Stock Unit	11/02/15	11/03/15	11/04/15	11/05/15	11/06/15	11/07/15
1 GASCYLC01	GAS CYL LPG A001	10.00	EA	10	10	10	10	10	10
2 GASCYLC01_NONSTOCK	GAS CYL LPG A001_NON STOCK MAN	0.00	EA	Booked	Booked	Booked	Booked	Booked	Free
3 GASCYLC01_NONSTOCK1	GAS CYL LPG A001_NON STOCK MAN	0.00	EA	Free	Free	Free	Free	Free	Free
4 GASCYLC01_TEST01_NON	GAS CYL LPG A001_Test01_NON	0.00	EA	Free	Free	Free	Free	Free	Free
5 GASCYLC01_TEST02_MAN	GAS CYL LPG A001_Test02_Man	100.00	EA	100	100	100	100	100	100
6 GASCYLT99	GAS CYL LPG T99 BASIC	72.00	EA	66	66	66	66	66	66
7 GASCYLT99_FIN_TEST	GAS CYL LPG T99 BASIC_TEST	13.00	EA	13	13	13	13	13	13

SELECTED ITEMS

Equipment	Description 1	Rent start date	Rent Return Date	Duration	Unit	Quantity to Rent	Unit	Unit Price
1								



**Sage ERP X3** Super administrator

Tables | Screens | Windows | Objects | Local menus - messages | Script editor | Service contracts | Processes | Service Request | Pre-Invoicing | Functions | More...

Service Order SER

Service Order No: 15-00068  
Intervention Number: 15-00068/0001  
Status: Planned  
Service Request type: RNT  
Company: NA10  
Site: NA012

Main | Contols | Details | Billing

Intervention Type: RNT  
Create Date: 01/23/15  
In-Progress Date:  
Confirmation Date:  
Confirmation User:

Operation Code	Service Product	Description 1	Asset	Description 1	Location	Qty	SAL	Status	Gross Price	Discount
1 RENT			T-001	Fuel Tank	QUA02	1	UN	A	150.0000	
2 RENT			T-8908	WATER TANK	QUA01	1	UN	A	500.0000	

Total Quantity: 2  
Total Price: 635.0000  
Total Price+Tax: 635.00





## POWERFUL BILLING RULES

Each industry has its own set of commercial and billing rules for rentals. Containers are rented per duration while car rentals are billed per duration and mileage.

Configure how you want to bill your rentals per Asset Category and your business processes will automatically take into account all the parameters you need to manage on the field.

### Pre Configured Billing Rules for :

#### Duration

- Days
- Weeks
- Months
- Quarter

#### Forfait

- Indexed on duration
- Indexed on Utilization
- Pro-rated

#### Utilization

- Mileage
- Meter Reading
- Counters

#### Occupation (warehouse)

- location
- number of moves

## Product category DEFAULT

Super administrator RNTMGT REF



Category \*

TANK

Tank Storage

Storage site

Description Management Units Of Measure Receipts Issue Flow Accounts/Costs  
Purchase/Sales Planning Warehouses **Rental**

### ITEM TYPE

#### Rent Classification

Rental

### INVOICING

#### Qty Determination

Base Unit + Extra Unit

#### Base Unit

Month

#### Extra Unit

Meter reading

Meter reading

Counter

Unit

### INSPECTION CHECK LIST

☐ Mandatory

Delivery Inspection

☐ Mandatory

Return Inspection

Maintenance Managem

## AUTOMATED AND FLEXIBLE INVOICING

Specific parameters at contract and asset category level let you choose :

- Periodicity of invoicing : at rental start, on return, after inspection...
- Grouping invoices : per activity type or asset type
- Define what is sold (consumables) and rented and manage invoicing parameters

## REPORTS & ANALYTICS

### OPERATIONAL

- Planning (Reservation, Maintenance, service orders...)
- Asset Utilization Reports
- Inspection and Checklist issues
- Service Orders

### FINANCIAL

- Rental Contract per Asset
- Billing per Asset types
- Contract Profitability Analysis reports
- Asset depreciation

### MAINTENANCE

- Scheduled Maintenance and Alerts
- Maintenance Service Orders
- Inspection Failures
- Safety records and compliance

## KEY POINTS WHEN GOING AHEAD

- 1 Rental Asset Information Configuration : Irrespective of your rental industry, configure detailed information that are most relevant per Asset category : physical characteristics, capacities, sizes,...
- 2 Configurable Rental business process per asset and contract types : Contract or Service Order based rental, delivery and pickup management, inspection checklist, additional services
- 3 Pre-Configured and Powerful Billing mechanisms : per contract and asset types. Invoice your rentals in in different sales unit : duration, utilization, forfait...

## ABOUT US

Founded in 2006, Tema Business Systems is a multi-award winning global service provider for Sage X3®, based in India and serving Sage X3 ecosystem around the world.

Our services and solutions are totally dedicated to Sage X3® platform, offering our customers in-depth X3 expertise along with significant cost saving through our offshore-on-site execution and delivery model.

Our Sage X3® practice is one of the largest in X3 ecosystem, with over 45 consultants and years of experience, having the right balance of both technical and functional expertise.

We bring the benefits of a global, international partner with the service quality and reactivity of a local company.

**TEMA BUSINESS SYSTEMS**

**H.No: 1-53, Plot No: 27  
401, 4th floor, Sagacity Heights,  
Phase-1, Kavuri Hills, Madhapur,  
Hyderabad: 500081, India.**

**Email** [contact@tema-systems.com](mailto:contact@tema-systems.com)  
**Web** [www.tema-systems.com](http://www.tema-systems.com)

**RENTAL  
MANAGEMENT SYSTEMS  
for Sage X3**

COPYRIGHT 2014-2016 TEMA BUSINESS SYSTEMS. ALL RIGHTS RESERVED.

THIS DOCUMENT IS PROVIDED FOR INFORMATION PURPOSES ONLY, AND THE CONTENTS HEREOF ARE SUBJECT TO CHANGE WITHOUT NOTICE. THIS DOCUMENT IS NOT WARRANTED TO BE ERROR-FREE, NOR IS IT SUBJECT TO ANY OTHER WARRANTIES OR CONDITIONS, WHETHER EXPRESSED ORALLY OR IMPLIED IN LAW, INCLUDING IMPLIED WARRANTIES AND CONDITIONS OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

WE SPECIFICALLY DISCLAIM ANY LIABILITY WITH RESPECT TO THIS DOCUMENT, AND NO CONTRACTUAL OBLIGATIONS ARE FORMED EITHER DIRECTLY OR INDIRECTLY BY THIS DOCUMENT.

THIS DOCUMENT MAY NOT BE REPRODUCED OR TRANSMITTED IN ANY FORM OR BY ANY MEANS, ELECTRONIC OR MECHANICAL, FOR ANY PURPOSE, WITHOUT OUR PRIOR WRITTEN PERMISSION.

TEMA BUSINESS SYSTEMS, X3 RENTALS FOR X3, ARE REGISTERED TRADEMARKS OF TEMA BUSINESS SYSTEMS AND/OR ITS AFFILIATES. OTHER NAMES MAY BE TRADEMARKS OF THEIR RESPECTIVE OWNERS. (REVISED 01 JAN 2016)

TBS AND ASSOCIATED LOGOS, PRODUCT AND SERVICES ARE TRADEMARKS AND PROPERTIES OF TEMA BUSINESS SYSTEMS PVT LTD.  
SAGE SOFTWARE, THE SAGE X3 LOGOS, AND THE SAGE SOFTWARE PRODUCT AND SERVICE NAMES MENTIONED HEREIN ARE REGISTERED TRADEMARKS OF SAGE GROUP OR ITS AFFILIATED ENTITIES.