

TRASER RentBoard

Documentation

TRASER RentBoard facilitates the central processes of rental disposition with a graphically appealing interface and extensive filter options.

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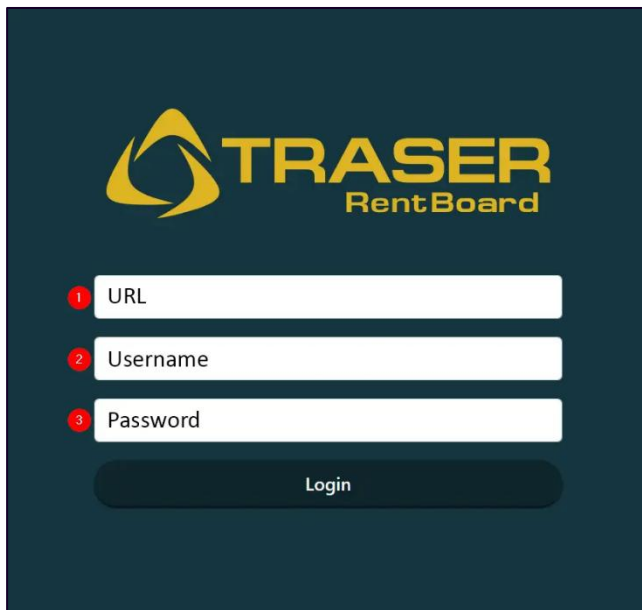
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2 Authentication

The user logs into the **RentBoard** with his username and password. If the **Windows Authentication** is set, a password can be assigned via the **Microsoft Dynamics NAV Password Authentication** tab.

3 Login

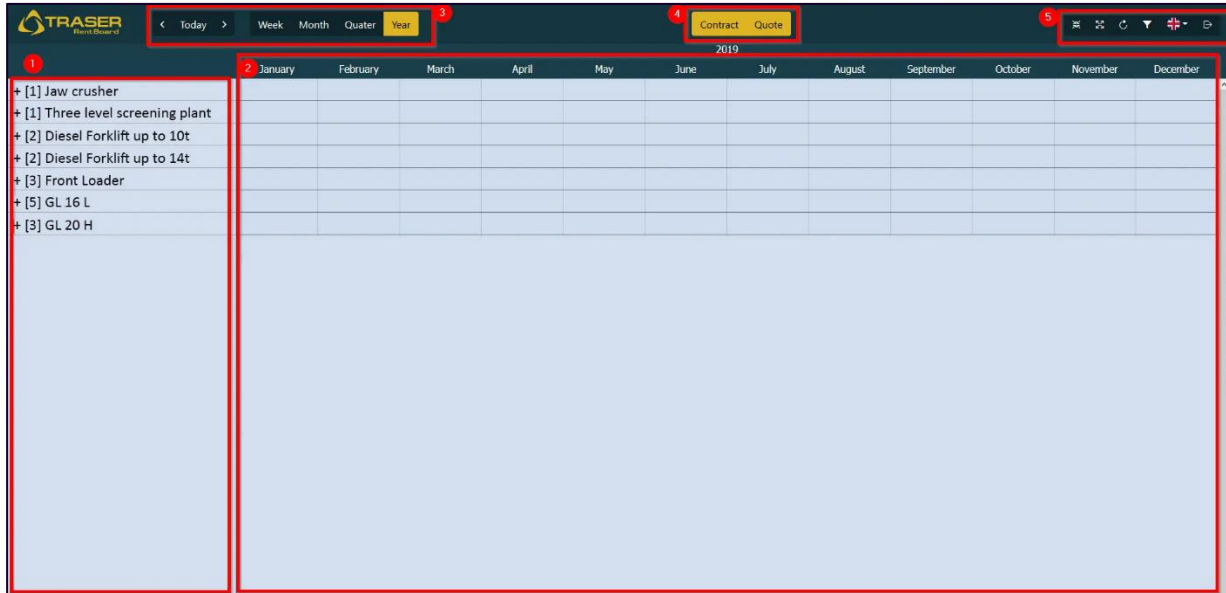
After you have started **RentBoard**, the login screen is displayed.



Position	Description
1	Field for entering the URL
2	Field for entering the username
3	Field for entering the password

- Enter your username and your password.
- Click on **Login** to display the main screen of **RentBoard**.

4 Main Screen

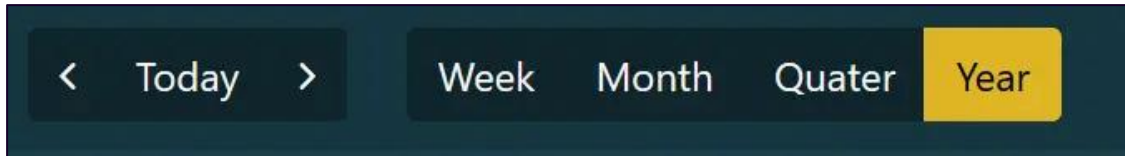


Position	Description
1	Sidebar for displaying object types and subordinate objects
2	Area for displaying rent contract lines for the objects listed in the sidebar
3	Navigation bar to show a specific time period
4	Bar to change between contracts and quotes
5	Bar to manage objects, set up the language and log off the user

By clicking the type line in the sidebar, you can display the child objects with various rent contract lines.

5 Navigation Bars

In the navigation bar, you can select which period should be displayed.



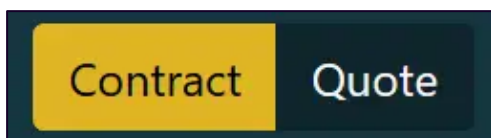
- Select the desired period.
- The selected period is highlighted in yellow.



Depending on the selected period, you can move one period forward or backward by using the arrow buttons (e.g., 2018 < 2019 > 2020).

5.1 Quote and Contract

You can switch between contracts and quotes on the main screen. You can either show contracts and/or quotes on the main screen. If contracts are shown, you can only create contracts. If quotes are shown, you can only create quotes. If both contracts and quotes are shown, you can choose upon creation whether you want to create a contract or a quote.



5.2 Management Bar



Position	Beschreibung
1	Does not show child object types
2	Does show child object types
3	Reloads all data (legacy data will be deleted)
4	Opens the filter dialog
5	Language selection
6	Logs off the current user

5.3 Sidebar

- The symbols + and - indicate whether child objects are shown or not.
- The number in square brackets indicates how many child objects are available.
- The symbols are followed by the object description.
- The second line is used to show rent contract lines planned for object types.

- [2] Diesel Forklift up to 10t
Diesel Forklift up to 10t
Linde Diesel Forklift H100D 123H1004711 – Kiel
Linde Diesel Forklift H100D 852H10096325 – Kiel
+ [1] Diesel Forklift up to 14t
+ [3] Front Loader

- This line shows an object.
- The first line contains the object description.
- The second line contains the serial number and location.
- The red background color indicates that it is a reserved rent contract line.

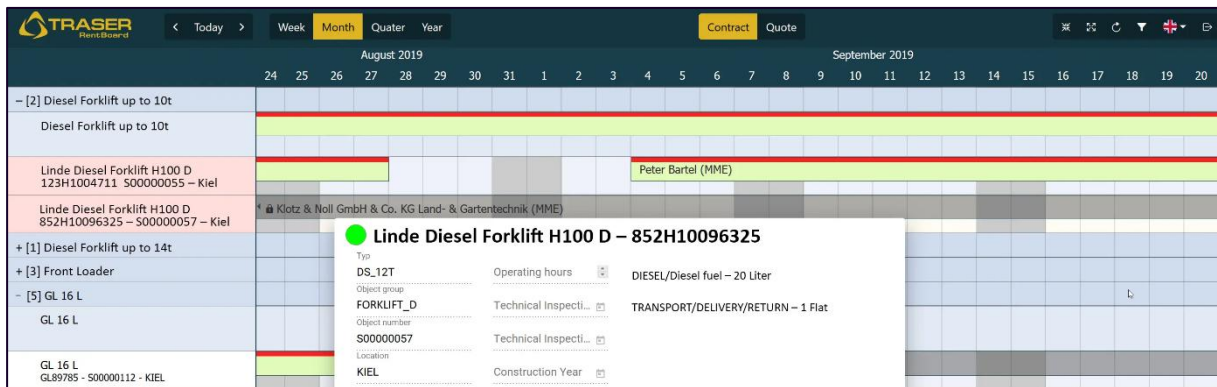
Linde Diesel Forklift H100D 123H1004711 – Kiel

6 Object Actions

The following sections describe the possible object actions in **RentBoard**.

6.1 Left Click

- By left-clicking an object, further information is shown.
- The colored circle on the left indicates the rent status. By hovering the mouse over the rent status, it is also shown as a text.
- To the right of the rent status indicator, you find the description and the serial number.
- The area below the rent status indicator contains general data and components.
- By left-clicking the description, you can open the object in the web client.

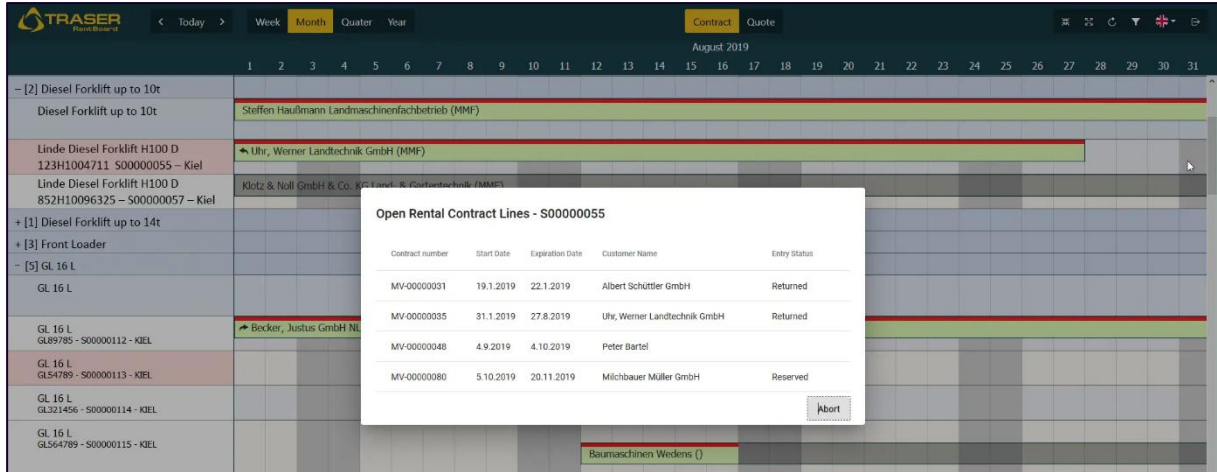


The screenshot shows the TRASER RentBoard interface. At the top, there are navigation tabs for 'Today', 'Week', 'Month', 'Quarter', and 'Year', with 'Month' selected. Below this is a calendar grid for August and September 2019. A list of objects is visible on the left side of the calendar. One object, 'Linde Diesel Forklift H100 D - 852H10096325', is highlighted in red. A pop-up window is open over this object, displaying the following details:

Linde Diesel Forklift H100 D – 852H10096325	
Type	DS_12T
Object group	FORKLIFT_D
Object number	S00000057
Location	KIEL
Operating hours	DIESEL/Diesel fuel – 20 Liter
Technical Inspecti...	TRANSPORT/DELIVERY/RETURN – 1 Flat
Technical Inspecti...	
Construction Year	

6.2 Right Click

By right-clicking an object, the open rent contract lines of the object are displayed. Thus, you receive an overview of rent contracts that are not part of the selected period.



The screenshot shows the TRASER RentBoard interface with a calendar view for August 2019. A modal window titled "Open Rental Contract Lines - S00000055" is open, displaying a table of contract lines. The table has the following data:

Contract number	Start Date	Expiration Date	Customer Name	Entry Status
MV-00000031	19.1.2019	22.1.2019	Albert Schüttler GmbH	Returned
MV-00000035	31.1.2019	27.8.2019	Uhr, Werner Landtechnik GmbH	Returned
MV-00000048	4.9.2019	4.10.2019	Peter Bartel	
MV-00000080	5.10.2019	20.11.2019	Milchbauer Müller GmbH	Reserved

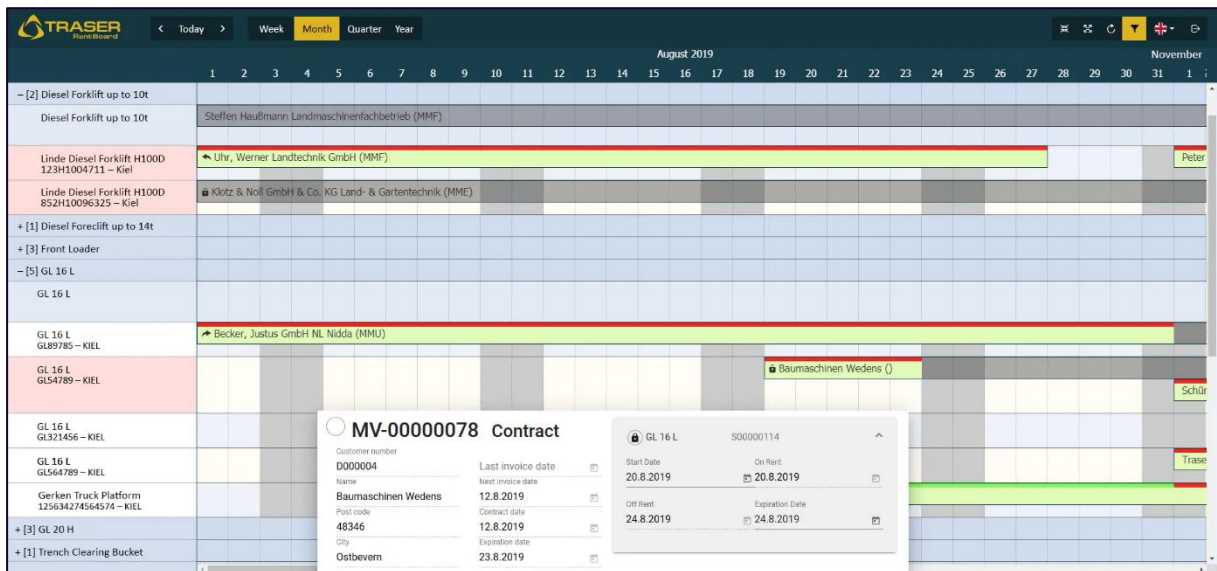
The modal window also includes an "Abort" button at the bottom right.

7 Rent Contract Actions

The following sections describe the possible rent contract actions in **RentBoard**.

7.1 Left Click

- By left-clicking a rent contract line, further contract information is shown.
- The circle on the left indicates the rent contract status.
- In the lower left area, you can find general information from the rent contract header.
- In the lower right area, you can find the other lines from the rent contract.



The screenshot displays the TRASER RentBoard interface. At the top, there are navigation tabs for 'Today', 'Week', 'Month', 'Quarter', and 'Year', with 'Month' selected. The calendar shows August 2019. A list of rent contract lines is visible, including 'Diesel Forklift up to 10t', 'Linde Diesel Forklift H1000', and 'GL 16 L'. A contract for 'GL 16 L' is selected, and a detailed view is shown in the foreground. The detailed view includes the contract number 'MV-0000078' and the following information:

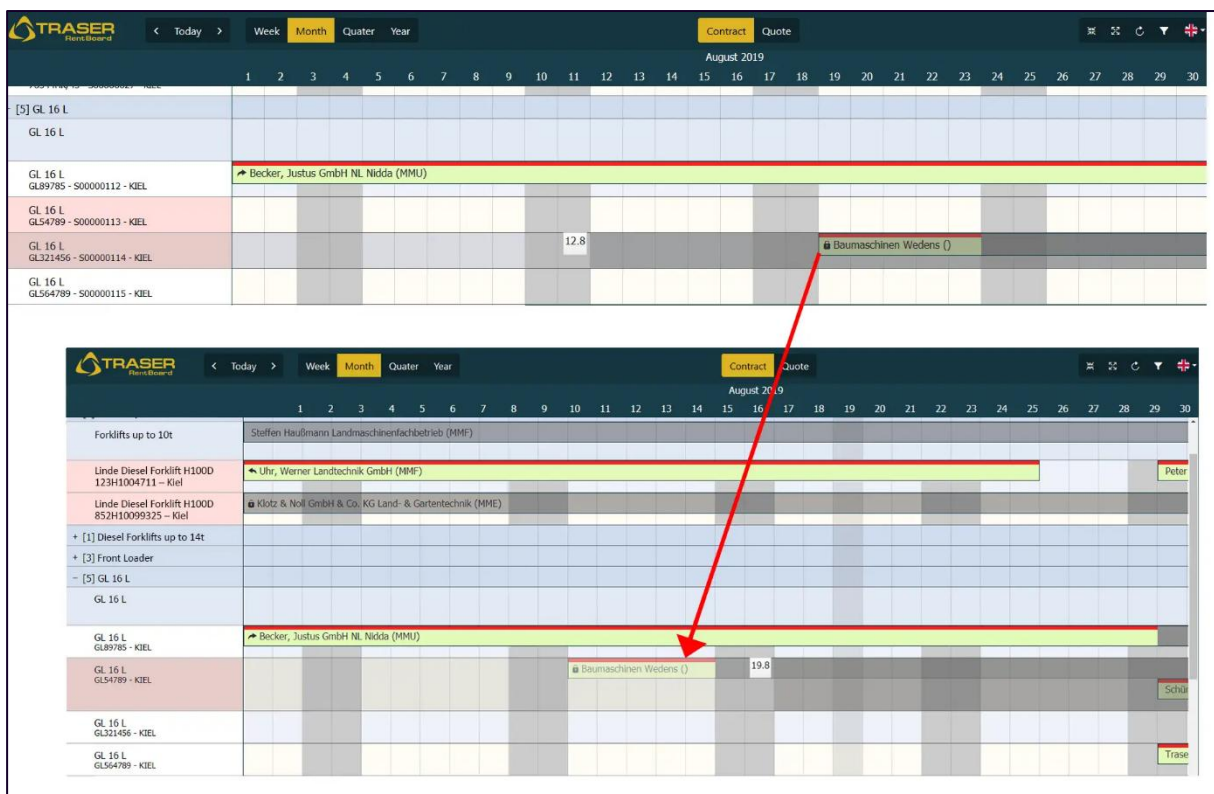
MV-0000078 Contract	
Customer number	D000004
Name	Baumaschinen Wedens
Post code	48346
City	Ostbevern
Last invoice date	12.8.2019
Next invoice date	12.8.2019
Contract date	12.8.2019
Expiration date	23.8.2019
Start Date	20.8.2019
On Rent	20.8.2019
Off Rent	24.8.2019
Expiration Date	24.8.2019

7.2 Right Click

- By right-clicking a rent contract line, a context menu opens. With the first option, **Nav Client**, the contract can be opened in the NAV web client.
- By clicking on the second context menu entry, you can reserve a rent contract line or cancel the reservation.

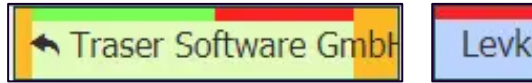
7.3 Move

- You can change the time data for contracts by means of drag and drop.
- Under certain circumstances, it is also possible to move time data up or down.
- If the rent contract line is allocated to a type, you can move the line to any other type or object.
- If the rent contract line is allocated to an object, you can only move it between different objects.



The image displays two screenshots of the TRASER RentBoard software interface, illustrating the 'Move' function. Both screenshots show a calendar view for August 2019, with the 'Month' tab selected. The top screenshot shows a contract line for 'Becker, Justus GmbH NL Nidda (MMU)' (GL 16 L, GL89785 - S00000112 - KIEL) highlighted in green, spanning from August 1st to 30th. A red arrow points from this line to the bottom screenshot. In the bottom screenshot, the same contract line is now highlighted in red and has been moved to August 17th, with a value of 19.8. Other contract lines are visible in both screenshots, including 'Baumaschinen Wedens ()' and 'Linde Diesel Forklift H1000'.

8 Description of Rent Contract Lines

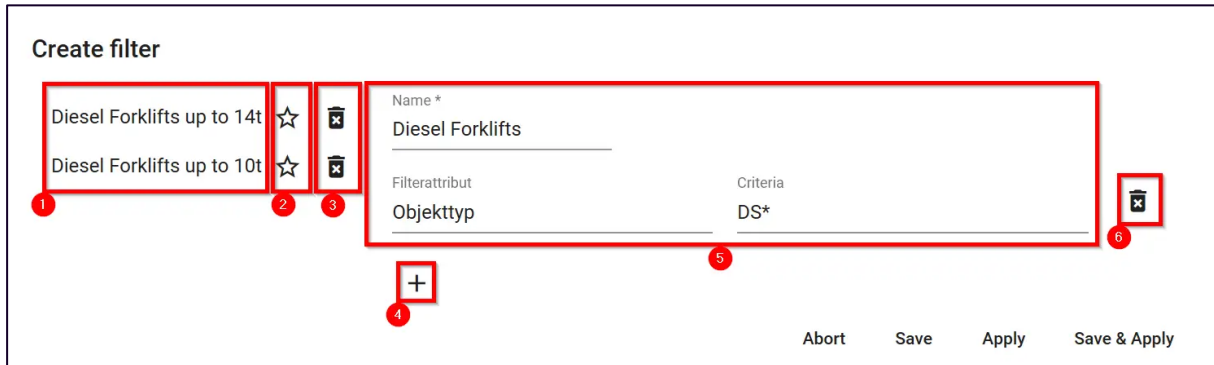


- You can tell apart contracts and quotes by the color of the main bar: Contracts are displayed in green, quotes in blue.
- The yellow bars at the beginning and/or end of an object show from/to when a contract is already blocked, but not yet invoiced. This may be the case if the shipment date is prior to the start of the rent.
- The yellow bar at the top of an object shows the date until which the contract will be invoiced.
- In case a contract has not yet been invoiced, the bar is entirely red.
- The background color indicates that it is a rent contract in this case.
- In case a rent contract is not yet finished, there is a grey bar after the expected end date. It indicates that the object is possibly not yet available again for rent.
- The text in the rent contract line shows the company owning the rent contract. The icon indicates the following:

Icon	Description
	Line has been delivered.
	Line has been reserved.
	Line has been returned.

9 Filter

Probably the most important functionality is the filter. With the help of the filter, you can filter objects by specified criteria based on all fields in the EQM object.



Create filter

Diesel Forklifts up to 14t ☆ ✕
 Diesel Forklifts up to 10t ☆ ✕

Name *
 Diesel Forklifts

Filterattribut: Objekttyp Criteria: DS*


✕


+

Abort Save Apply Save & Apply


Position	Description
1	In this area, saved filters are displayed. These filters are saved in the browser.
2	The standard filter which will be applied automatically upon login is highlighted by a filled black star.
3	You can delete filters via the corresponding trashcan icon.
4	With the plus icon +, you can create new filters. If the same filter already exists, it is overwritten without confirmation. It is also possible to copy filters. To add an edited filter, select a filter, add a filter criterion and save the filter with a new name. New filters can be created in case the filter name is not yet available in the filter list on the left.
5	In this area, you can create and/or edit filters.
6	With this button, you can delete the selected filter.


Create filter

Diesel Forklifts up to 14t ☆ 

Diesel Forklifts up to 10t ☆ 

Name *
Diesel Forklifts

Filter attribute: Object type Criteria: DS* 

Filter attribute: rent status 


Rent status


Reg. rent status

Abort Save Apply Save & Apply


- Filter attributes will be proposed in a dropdown menu.
- If you enter **rent status**, all items containing **rent status** will be proposed.


Create filter

Diesel Forklifts up to 14t ☆ 

Diesel Forklifts up to 10t ☆ 

Name *
Diesel Forklifts

Filter attribute: Object type Criteria: DS* 

Filter attribute: rent status 

+

Available

Rented

Maintenance

Service

& Apply

- The filter condition dynamically adapts to the filter attribute.
- If a filter attribute which only allows specific options is selected, only these specific options will be displayed.
- For code fields, only proposals based on the entered texts will be displayed.

10 Common Errors

This chapter describes common errors and their possible solutions.

10.1 Login to the Test System Failed

This can happen if the password has been changed since the last copy of the test system. Since the data is kept separately, these changes are not exchanged between the systems. The solution is either to use the old password or to assign a new password in the test system.

10.2 Saved Filters Are Deleted After Reboot

This may be related to the fact that the browser does not save the data between reboots. In this case you must contact your internal IT department. The default setting **At Installation** also saves the data between restarts.

10.3 Rent Objects Aren't Displayed

A possible source of error may be that the desired rent object isn't filtered by the specified criteria. To test this, you can enter the filter in NAV and check whether the rent object in NAV is filtered. If the rent object is displayed in NAV with the selected filter, the rent object either has no inventory and/or is blocked for rent.