



Fleet Rental Management

USER MANUAL

Version: v 10.0

Technical Name: fleet_rental

INTRODUCTION:

Vehicle Rental is one of the fast-growing industry. This type of business should have good Vehicle Tracking Methods, Contracts Structure Management facility, Vehicle Asset management facility and moreover a well Document Handling and Report Generation system. Simply say, A good management software plays a key role in the successful running of such a business.

Here, Cybrosys brings “***Fleet Rental Management***” application module over the base of Odoo ERP.

Odoo has a basic module named “Fleet” for managing vehicles. Our “***Fleet Rental Management***” add some new features and workflows over this structure. Since the Application is built over existing Odoo ERP, it is easy to install and use for any type of customer.

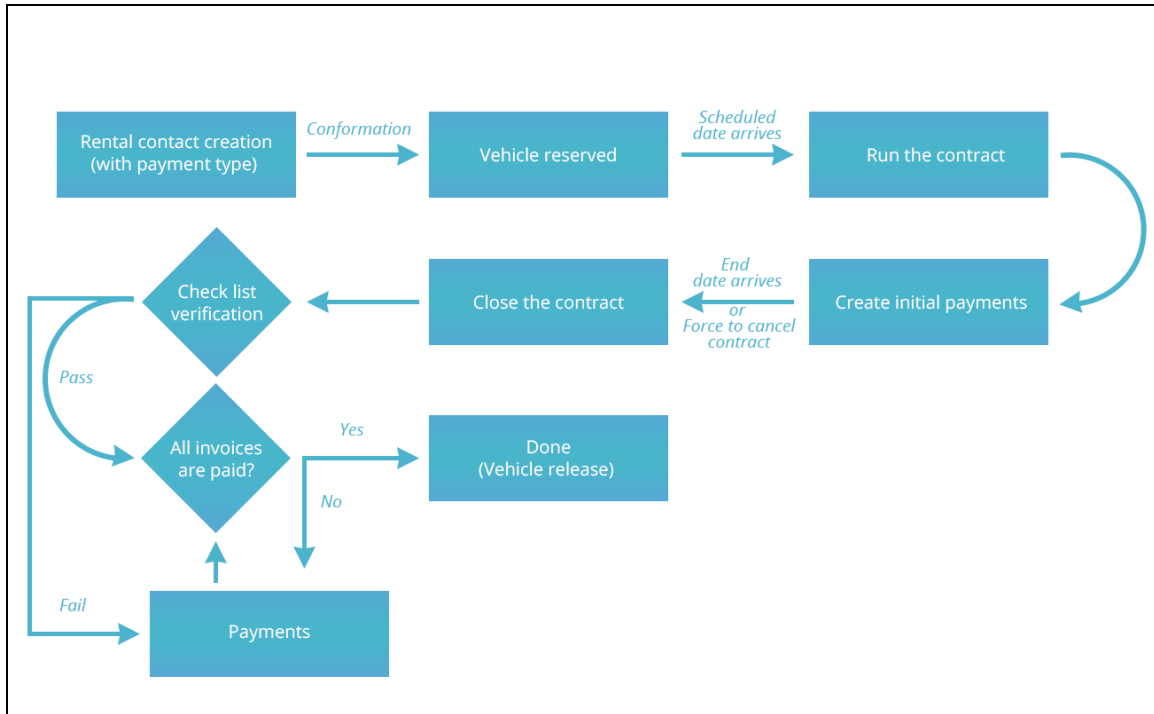
FLEET RENTAL MANAGEMENT:

This module brings a rental system that integrated with Accounting, Reporting, and Email to conduct the business more efficiently. It also supports some essential facilities like Recurrent Invoices on a contract, Multiplan billing etc.

Here are some features..

- Multiple Plans for Rental Contract (Days/Weeks/Months/Years).
- Integrated with Accounting Module.
- Integrated with Mail.
- Integrated with Reporting.
- Automation of Recurring Invoices.
- Payment Validations.
- Mail Acknowledgment/Reminder for Confirmation, First Payment & Invoices.
- Checklist Facility while Closing the Contract.
- Billing Feature for Damages / Missing Products.
- Multiple Level of Access Rights: Manager / Rental System user.
- Flexible for Upgrade.

FLEET RENTAL MANAGEMENT WORKING ARCHITECTURE:



Here is the typical workflow of the fleet rental module. From rental contract creation to Contract termination and returning of the vehicle. The user can track and manage the entire process in simple steps. .

INSTALLATION STEPS

This module is available to download from Odoo apps for Odoo version 10.

https://www.odoo.com/apps/modules/10.0/fleet_rental/

Step 1: Download and extract the zip file.

Step 2: Copy download modules to add-ons path.

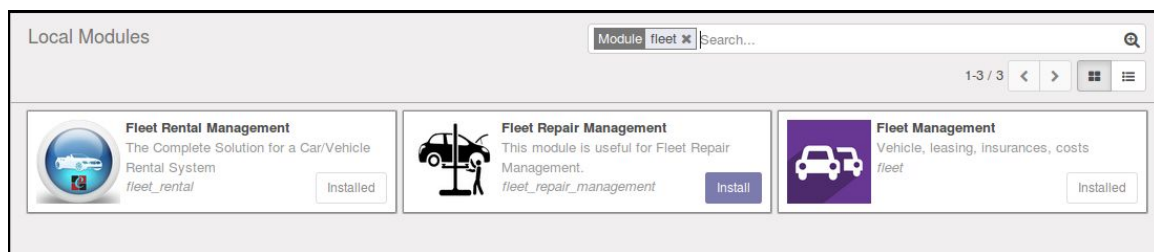
Step 3: Restart Odoo server.

Step 4: Login with the admin credentials in your Odoo instance.

Step 5: Activate developer mode from Settings.

Step 6: Go to Apps -> Updates Apps List .Click on “Update” button from the pop up wizard.

Step 7: Go to Apps -> Apps.



Step 8: Search “Fleet Rental” In search bar.

Step 9: Install “Fleet Rental Management” from this list.

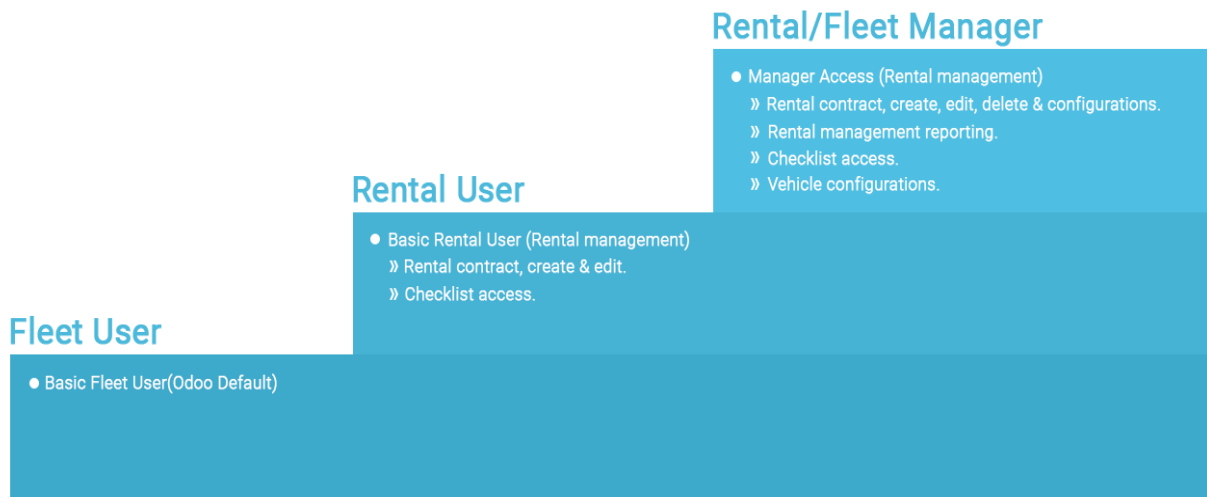
HOW IT WORKS?

After successful installation, there will be a new menu named “Fleet Rental” in your Odoo software.

1. USER ACCESS LEVELS:

This module has three type of access levels for system users.

- Fleet User. [Same as Odoo fleet user]
- Fleet Rental User.
- Fleet Rental Manager / Fleet Manager .



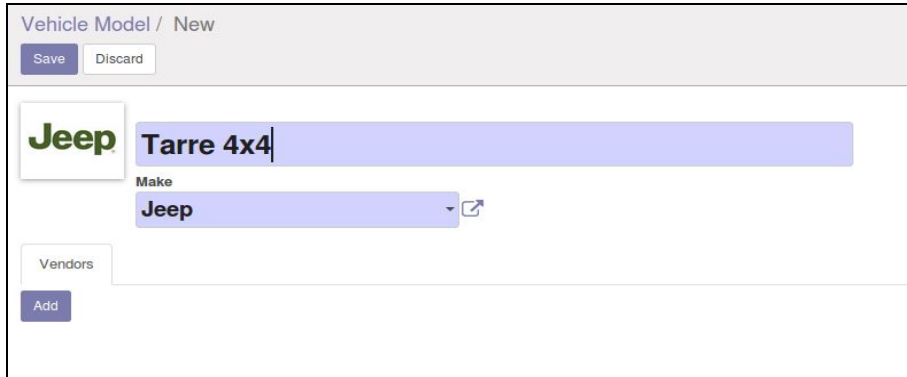
(✓ Read / ✓ Write / ✓ Create / ✓ Delete)

PROCESS	FLEET RENTAL USER	FLEET RENTAL MANAGER
Vehicle Creation	✓ ✓ ✓ x	✓ ✓ ✓ ✓
Odometer Logs	Same as Fleet User	✓ ✓ ✓ ✓
Vehicle Fuel Logs	Same as Fleet User	✓ ✓ ✓ ✓
Vehicle Service Logs	Same as Fleet User	✓ ✓ ✓ ✓
Rental Contract	✓ ✓ ✓ x	✓ ✓ ✓ ✓
Checklist	✓ ✓ ✓ x	✓ ✓ ✓ ✓
Tools / Accessorie	✓ ✓ ✓ x	✓ ✓ ✓ ✓
Create Invoice	✓ ✓ ✓ x	✓ ✓ ✓ ✓
Rental Reports	Not Accessible	Accessible

2. CONFIGURATIONS OF VEHICLE MODEL:

We have to add our assets/vehicle model. For this, go to:

- **Fleet Rental –>Configurations –>Vehicle Model**



Vehicle Model / New

Save Discard

Jeep Tarre 4x4

Make
Jeep

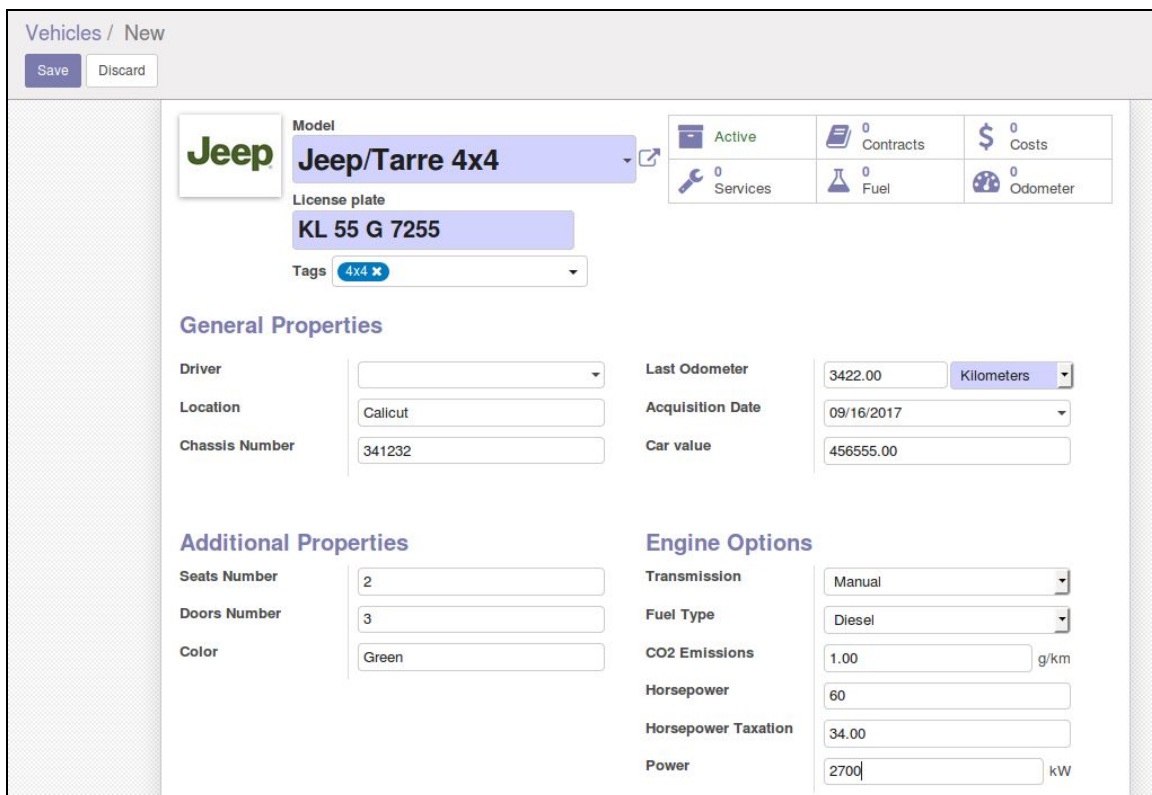
Vendors
Add

3. ADD ASSET/VEHICLE

Under a model you can add any number of vehicles.

For this, go to:

- **Fleet Rental –> Vehicles –> Create**



Vehicles / New

Save Discard

Jeep Model
Jeep/Tarre 4x4

License plate
KL 55 G 7255

Tags
4x4

Active	0 Contracts	\$ 0 Costs
0 Services	0 Fuel	0 Odometer

General Properties

Driver: [Dropdown]
 Location: Calicut
 Chassis Number: 341232
 Last Odometer: 3422.00 Kilometers
 Acquisition Date: 09/16/2017
 Car value: 456555.00

Additional Properties

Seats Number: 2
 Doors Number: 3
 Color: Green

Engine Options

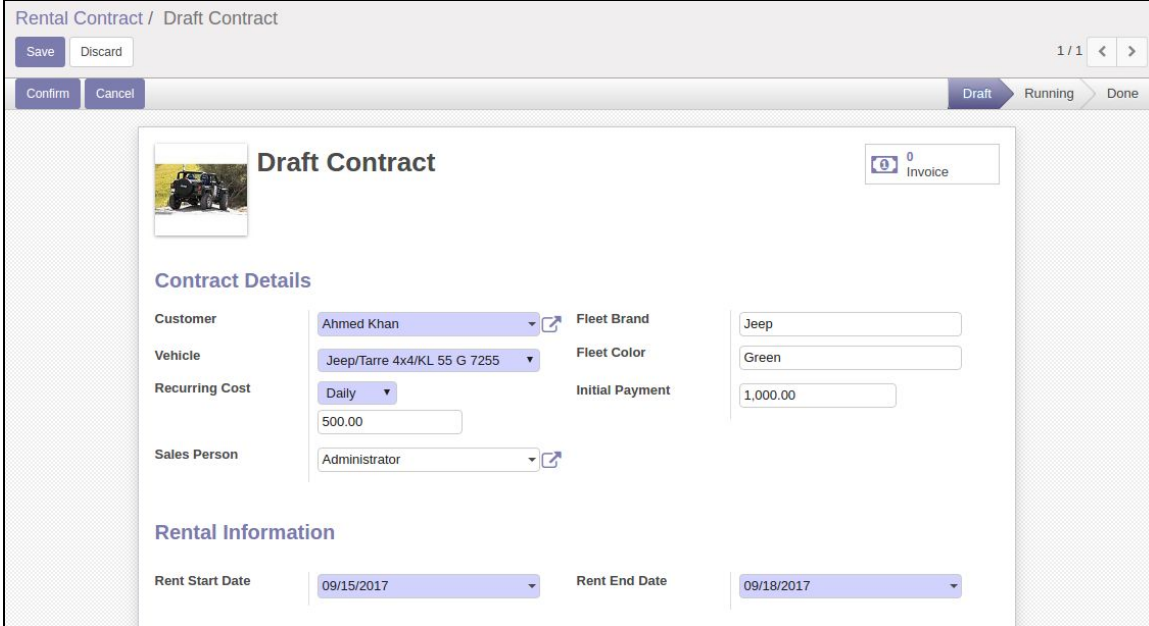
Transmission: Manual
 Fuel Type: Diesel
 CO2 Emissions: 1.00 g/km
 Horsepower: 60
 Horsepower Taxation: 34.00
 Power: 2700 kW

4. CREATE A RENTAL CONTRACT:

Once the vehicles are listed in your system, you need to add the Rental Contracts.

For this, go to:

- **Fleet Rental –>Rental management –> Create.**



Rental Contract / Draft Contract

Save Discard 1 / 1 < >

Confirm Cancel Draft Running Done

Draft Contract Invoice 0

Contract Details

Customer: Ahmed Khan Fleet Brand: Jeep

Vehicle: Jeep/Tarre 4x4/KL 55 G 7255 Fleet Color: Green

Recurring Cost: Daily Initial Payment: 1,000.00

500.00

Sales Person: Administrator

Rental Information

Rent Start Date: 09/15/2017 Rent End Date: 09/18/2017

By selecting the vehicle, almost all data related to the vehicle will be filled automatically.

But we have to take care of some fields here.

Initial Payment: Transaction/Office/Contract charge amount, must be paid by customer (It is optional).

Recurring Cost: Choose a payment type. Daily/Weekly/Monthly.

Rent Date Start: Starting date of rent.


Rent End Date: Ending date of rent.

- After filling these details, click “**Confirm**” button. Then the contract name will change to a reference like RENT/2017/01 or RENT/2017/01 etc. And workflow will change to “**Running**” stage (See the image below).
- If we select the costing method as “**Daily**”, it will create a payment line under the contract. Unpaid payments will be listed in red color.
- **Create invoice** button will help to pay “Initial Amount” and previous recurring payments.

Rental Contract / RENT/2017/0002

Edit Create Action ▾ 1 / 1 < >

Create Invoice Draft Running Done



RENT/2017/0002

1 Invoice

Contract Details

Customer	Ahmed Khan	Fleet Brand	Jeep
Vehicle	Unknown	Fleet Color	Green
Recurring Cost	Dally500.00	Initial Payment	1,000.00
Sales Person	Administrator		

Rental Information

Rent Start Date	09/15/2017	Rent End Date	09/18/2017
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Recurring Invoices
Checklist

Date	Due Date	Description	Account	Amount	Payment Stage	Invoice Ref
09/15/2017		Jeep/Tarre 4x4/KL 55 G 7255	Local Sales	500.00	draft	Invoice Ahmed Khan

5. ADD CHECKLIST LINES & DOCUMENTS FOR CONTRACT:

What is check list lines?

Checklist lines are the Accessories/Tools (i.e Music system, Remotes) or Documents within the rented vehicle. We can add checklists & vehicle documents to all rented vehicles. And when a contract comes to its closing stage, we have to verify the items are there in the vehicle. Otherwise, penalty amount will be added to the invoice. We can add checklist lines in the contract under the page **“Checklists”** as below.

Recurring Invoices
Checklist

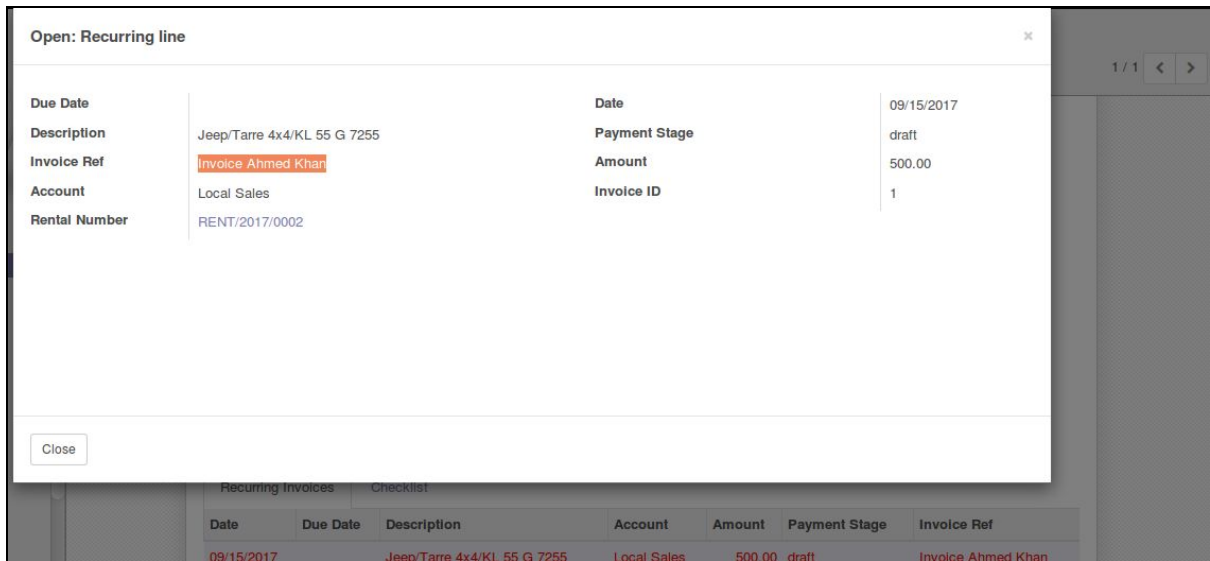
Attachments

Insurance 2312.png
Registered Certificate.png

Name	Active	Price
Music System	<input checked="" type="checkbox"/>	12,900.00
Remote	<input checked="" type="checkbox"/>	1,200.00
Tools Full Set	<input checked="" type="checkbox"/>	700.00

6. MAKE INITIAL PAYMENT & RECURRING PAYMENT:

- Click the “**Create Invoice**” button to make the initial payment.
- For recurrent invoice payment, just go to the “**Recurring Payment**” page / Click the **Payment Line** from the tree view.
- Then click the “**Invoice Reference**” field value, it will navigate you to the corresponding invoice and make payment from there.



7. CLOSE THE CONTRACT:

This is the final step of rental management. In order to close a rental contract all the pending payments must be paid (Both the recurring payment and the initial payment). If the contract has any pending invoices, It can't be closed.


Checklist Verification:

First you have to check each checklist lines (Tools/Accessories) of the rented vehicle when closing a contract.

Rental Contract / RENT/2017/0004

Edit Create Action 3 / 3

Force Checking Draft Running Done



RENT/2017/0004 2 Invoice

Contract Details

Customer	Ahmed Khan	Fleet Brand	Jeep
Vehicle	Unknown	Fleet Color	Green
Recurring Cost	Daily 120.00	Initial Payment	INV/2017/0010 Ahmed 120.00Khan
Sales Person	Administrator		

“Force Checking” button in contract form.

- We can see a button “Force Checking” on the rental contract. Click it.
- It will bring a new record under the menu **Rental Management / Checklist**. Open the record and verify each line (If it is OK). (Eg: Music system is working well; Click “✓” on Active field in check list line). By default, All the lines will be True. Untick the corresponding line if an accessory is missing.

Checklist / RENT/2017/0003

Edit Action 1 / 1

Create Invoice Checking

Contract RENT/2017/0003 **Damage cost** 200.00

Attachments Insurance 2312.png
Registered Certificate.png

Checklist

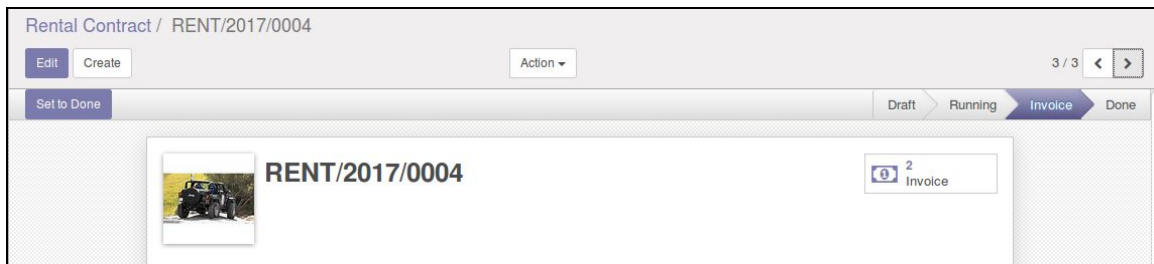
Name	Active	Price
Music System	<input checked="" type="checkbox"/>	12,900.00
Remote	<input checked="" type="checkbox"/>	1,200.00
Tools Full Set	<input type="checkbox"/>	700.00

Total(Tools) : 14,800.00
Tools missing cost : 700.00
Damage cost : 200.00
Total cost : 900.00

- Click “Create Invoice” . It will create a penalty invoices if any checklist line is “False” (That indicating missing accessory). This process also can be done

from the contract form itself by clicking “*Verify*” button on bottom right corner.

- **Create Invoice** option also adds the “Damage Cost” in the generated invoice (See above image for damage cost field in “Checklist form).
- After performing **Register Payment** of all the generated invoices, We can move the contracts to the **Done** stage by click “*Set to Done*” button (See the image below).



“*Set to Done*” closes the contract.

Rental Contracts treeview have separate color codes based on its stage.

Rental Contracts treeview have separate colour codes for each stage.

○ - Contract Draft Stage.

○ - Contract Running Stage.

○ - Accessories/Tools: Checking Stage.

○ - Missing Accessories/Tools: Invoice Stage.

○ - Done Stage.

Rental Contract									
Search...									
1-5 / 5									
<input type="checkbox"/>	Name	Customer	Vehicle	Rent Cost	Fleet Brand	Fleet Color	Rent Start Date	Rent End Date	State
<input type="checkbox"/>	RENT/2017/0002	Agrolait, Edward Foster	Audi/A1/1-AUD-001	0.00	Audi	White	09/18/2017	09/29/2017	Done
<input type="checkbox"/>	RENT/2017/0003	Agrolait, Edward Foster	Audi/A1/1-AUD-001	0.00	Audi	White	09/18/2017	09/18/2017	Invoice
<input type="checkbox"/>	RENT/2017/0004	Ahmed Khan	Jeep/Tarre 4x4/KL 55 G 7255	0.00	Jeep	Green	09/19/2017	09/19/2017	Done
<input type="checkbox"/>	RENT/2017/0005	Agrolait, Thomas Passot	Jeep/Tarre 4x4/KL 55 G 7255	0.00	Jeep	Green	09/19/2017	09/21/2017	Running
<input type="checkbox"/>	RENT/2017/0006	Agrolait, Edward Foster	Mercedes/Class A/1-MER-001	0.00	Mercedes	Brown	09/18/2017	09/22/2017	Running

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