

EnergySolutions Rental Management

← → ↺ 🔍

EnergySolutions Rental Management

built by
BAPO
[App Management](#)

Rentals | All Orders | Transaction Logs

Search:

Status Filter:

Drop-Down Of Status ▼

Results Per Page:

25 ▼

Expand	Order	Date	Customer	Inv Status	Work Order Status	PTD	Current Total
(+)	197	15th Jan 2018	James Smith	Out for Rental	Awaiting Calibration	06/23/18	\$248.92
(+)	191	15th Jan 2018	John Smith	Out for Rental	Shipped	06/17/18	\$142.78
⊖	197	15th Jan 2017	James Smith	Partial Invoice	Shipped	06/11/18	\$2106.22

Customer Details:
 Email: james@esltd.com
 Phone: 405-458-7894
 Payment Type: Visa 4587 07/20
 Start Date: Joun 1, 2017
 PTD: June 23rd, 2018

Billing:
 James Smith
 Sailing Smith Ltd.
 123 Loser Blvd
 L.A. California. 90213

Shipping
 James Smith
 Sailing Smith Ltd.
 120 Warehouse Lane
 Unit 25
 LA, California, 91613

Order Items to charge this month...

/	Order	Product Name	SKU	Serial Number	Start Date	End Date	Rate	Adjust	Actions
1		Product Name	21210	<div>Serial Number ▼</div>	<div>Calendar Icon</div>	<div>Calendar Icon</div>	109.99/month	0%	<div>Recycle Icon</div> <div>Info Icon</div>
3		Product Name	21445	<div>Serial Number ▼</div>	<div>Calendar Icon</div>	<div>Calendar Icon</div>	109.99/month	20%	<div>Recycle Icon</div> <div>Info Icon</div>

MANUAL ADJUSTMENTS BELOW

Charge/Credit ▼ Title ▼ \$

Quantity 1 ▼

Note

Calendar Icon + -

Charge/Credit ▼ Title ▼ \$

Quantity 1 ▼

Note

Calendar Icon + -

Note/Comment for next invoice.

Total Pending Charge: **\$219.98**

PROCESS CHARGES

Transaction logs...

Status	Product Name	Amount Captured	Transaction ID	Capture Date	Invoice
Captured	Laser - 2 Month Rental	\$1349.00	Visa - 12656456874	1st June 2018	View
Captured	Laser - 2 Month Rental	\$1349.00	Visa - 12656456874	1st May 2018	View
Captured	Laser - 2 Month Rental	\$1349.00	Visa - 12656456874	1st April 2018	View

⊖	197	15th Jan 2017	James Smith	Partial Invoice	Shipped	06/11/18	\$2106.22
---	-----	---------------	-------------	-----------------	---------	----------	-----------

<< 1 2 3 4 ... 10 >>

powered by MINIBC Payments | [Get Support](#)

UPDATES 6/18

1. Addition of the ability to enter a serial number
2. Addition of start and end date fields for entry or update
 - a. By default the start date will be when shipped, but can be overridden
 - b. End date is manually entered and signifies the end of a rental (or clicking on an icon for the return will set the item as returned and mark the end date as the current date)
3. Rate is shown in an input box so that it can be updated or changed manually
4. A percentage box is provided to take a percentage off of the item
 - a. When clicked (default is 0%) a modal window will open to enter a percent and if it applies to all or just the single line item
5. Added an icon for return if the item was returned and it will just add today's date in the return field
6. The money icon is to mark the item as offline payment and will mark the item as paid offline. A modal will ask if the payment was for the month or to close out the item.
 - a. Manual adjustments are made to add as many items as required with the following functions/items;
 - b. Title for the line item, searches product live or allows a custom title
 - c. Price for the item - price per item
 - d. Quantity of items - Number of items at rate calculated for a total
 - e. Multi line note box - Ability to put a note against each line item
 - f. Optional Date - You can add a date to the line item if applicable.
 - g. Add or remove the line - add as many items as needed or remove items.
7. Overall note for the invoice - the note will show on the invoice.
8. Total pending charges for the next invoice period.
9. Manual process button - let's you push the process of items in case manual intervention is required.
10. PTD (Paid to Date) - Shows the paid to date on the account.
11. Work order status - BigCommerce based status for filtering by
12. Status changed to invoice status

UPDATES 6/24

13. Offline payment needs to be move to be an order based offline payment, not a line item payment
14. An invoice needs to be able to be put on HOLD for charging purposes only
15. Add a checkbox for taxes for manual tax addition. Attempt to automatically apply taxes by the work order type, shipping type and address.
16. Pausing is removed.
17. When any item is rented, the newest rate will be applied by BigCommerce

18. Discounts will have a window for applying to multiple as outlined below. A way to remove a discount from a line item is required.

The wireframe shows a rectangular box with a title 'Apply a percentage discount' at the top. Below the title is the label 'PERCENT' followed by a text input field. Underneath the input field is a checkbox with the text 'apply to all line items/serial numbers'. At the bottom of the box is a button labeled 'APPLY DISCOUNT TO RATE'.

Upon opening an order, the following capabilities will be had;

- **Adjust start date** - Not shown in the above wireframe, there is a date per line item that tells the start date of a rental. This date needs to be changed as needed.
- **Show the serial number** - The serial number needs to be shown on each line item. Not shown above, the serial number needs to be added to the line item and needs to be added by the admin manually.
- **Adjust rate** - The rate may need to be adjusted to an old rate if something is returned for repair and is on an old rate.
- **Pause a rental** - Essentially this is a period of free time. An item that is paused will essentially adjust the start date, thus, when returned, we'll calculate the final amount based on the new date. Logic for long term pause and short term pause should be the same unless the pause becomes longer than the period of the rental. This would become a negative period where we would have "banked" time and adjust upon return. Thoughts on how this is displayed to the user should be considered.
- **Return rental** - when an item is marked as returned - the return date will be set and final charges charged. The status of the order will be one of the following through the rental return process;
 - **Returned** - all line items within an order are marked as returned.
 - **Partially returned** - a line item has returned items and items still out for rental.
 - **Paused** - when an order has only paused items under it.
 - **Partially paused** - when a paused item and active item are within an order.
 - **Out for rental** - all items on order are currently out for rental.
- **Give a discount** - A discount may be issued on the order for the month. Discounts cannot be greater than the amount to be charged that month.
- **Enter a note** - Need a facility, not shown above, where a note may be added to a line item for the invoice.

- **Mark paid offline** - the ability to mark an order as paid offline is available. An entry of an amount is made and considered the payment for the month and nothing will be charged.

Notes:

- Status of repair is a return. Repairs require a new rental, which means that a new order will require an adjustment occasionally. Although rare, this number can be shown when an order for the same client of the same product is made, and give the adjustment as an option to accept against that line item/order. This would help to ensure proper credit is given without needing to do the math.
- The script will take into account serial numbers that may skip a months charge when first rented and only 16 days in as it rolls into a new month.
- On a monthly rollover, every rental will be charged. Given the script that we have been provided we will use the logic to charge customers appropriately.
- All charges will be placed through BigCommerce as an order through the API so that all record keeping and tools within BigCommerce can be used. We'll need to decide on if there is a different title or order comments that will be needed to align orders/charges.
- Additional detail on customers will need to be exposed in the table for initial line items of orders to help identify the right people/company orders. Each order no matter any similarities will bill individually and email an invoice specific to that charge.
- We will need to add a filter to the dashboard to show items that are of a certain status as mentioned above.
- Start date needs to be a custom field on an order so that we can read it and put that in our order dashboard per line item. Each item date
- An invoice will need to go out with some customization from a regular invoice item;
 - Serial number of the item
 - Rental period charged
 - Rental fee
 - Invoice number (work order number)
 - Tax (if applicable) *will you be using avalara?
 - Discount (if applicable)
- Invoices are sent when a charge is made and that may be up to anytime after the initial order but less than a month as the system will bill monthly.

Questions:

- What happens when a payment fails? What is the process for remediation or credit card replacement.
- Calibration invoices. We need to understand how these are different, when ordered. We would not have a way to send a different invoice so the field would need to be blank for the rental period. Why are these different? How are they on order?

The screenshot displays the EnergySolutions Rental Management web application. A modal window is open, titled "Order: 197 | Credit Order or Add Shipping". The modal contains the following information:

- Adjustment Value:
- Current Capture Value: \$1257.80
- Total to Capture: **\$1277.80**
- Update Capture Value** button

The background interface includes a search bar, a table of orders, and a sidebar with customer details.

Customer Details:

Info:
Email: james@esltd.com
Phone: 405-458-7894
Payment Type: Visa 4587 07/20

Billing:
James Smith
Sailing Smith Ltd.
123 Laser Blvd
LA, California, 90213

Shipping:
James Smith
Sailing Smith Ltd.
120 Warehouse Lane
Unit 25
LA, California, 91613

Totals: 4 \$355.00

Buttons: CAPTURE & MARK AS RETURNED, ADD SHIPPING, CREDIT ORDER, Mark Paid Offline

Status	Product Name	Amount Captured	Rental Period	Transaction ID	Capture Date	Invoice
Captured	Laser - 2 Month Rental	\$1349.00	17 Months	Visa - 12656456874	16th May 2018	View

Navigation: << 1 2 3 4 ... 10 >>

powered by MINIBC Payments | [Get Support](#)

Modal Windows

All modal windows will be similar to the above and all actions on line items will live within the modal windows. AKA, when adding a note, adjusting a start date etc, will all happen within a modal window when the admin clicks on an icon.

EnergySolutions Rental Management

← → ↺ 🔍

EnergySolutions Rental Management

built by
BAPO

RentalsTransaction Logs

App Management

Search: Order Number, Name, EmailResults Per Page: 25▼

Order	Date	Customer	Status	Days Out (Months)	Shipping	Captured Total
197	15th Mar 2018	James Smith	Completed	95(3)	Cust	\$248.92
191	15th Mar 2018	John Smith	Completed	69(2)	Cust	\$142.78
187	15th Mar 2018	James Smith	Completed	95(3)	Cust	\$248.92
181	15th Mar 2018	John Smith	Completed	69(2)	Cust	\$142.78
177	15th Mar 2018	James Smith	Completed	95(3)	Cust	\$248.92
171	15th Mar 2018	John Smith	Completed	69(2)	Cust	\$142.78
167	15th Mar 2018	James Smith	Completed	95(3)	Cust	\$248.92
161	15th Mar 2018	John Smith	Completed	69(2)	Cust	\$142.78
157	15th Mar 2018	James Smith	Completed	95(3)	Cust	\$248.92
151	15th Mar 2018	John Smith	Completed	69(2)	Cust	\$142.78
147	15th Mar 2018	James Smith	Completed	95(3)	Cust	\$248.92
141	15th Mar 2018	John Smith	Completed	69(2)	Cust	\$142.78
137	15th Mar 2018	James Smith	Completed	95(3)	Cust	\$248.92
131	15th Mar 2018	John Smith	Completed	69(2)	Cust	\$142.78

<< < 1 2 3 4 ... 10 >>>

powered by MINIBC Payments | [Get Support](#)

Transaction Log

The transaction log will essentially just be a place where all of the transactions per order a housed all together. These transactions will be searchable but no actions can be had on the transactions.

Settings (not shown)

The app settings page will allow the management of some app specific items. The items will be as follows;

UPDATES 6/18

- Tax settings will be placed here (this may end up tying into our tax settings from another app to manage taxes but you have some particulars that we may need overrides in the settings area
- Default card assignment - will have a setting for customers to check

Invoices



Instrument Services Facility
1570 Bear Creek Road
Oak Ridge TN 37830
877-462-4873

Bill To

Cindy Cloudman
BHI Energy
800-225-0385
60 Industrial Park
Road
Plymouth MA
02362
United States

Ship To

Kathy Rowney
BHI Energy
2425 River
Road
Trailer SP26C
Niskayuna NY
12309
United States

Invoice Detail

Date	1/22/2018
Work Order #	2017-15627, 2017-15337, 2017-15543 & 2017-15250 Rental
Customer Category	Return Repair
Work Order Type	External Customer
Payment Method	Rental
Customer PO #:	SPRU-2011-SCSPRU 29463-093
Internal #:	
Primary Billing Email Address	cindy.cloudman@bhienergy.com
Secondary Billing Email (Optional)	
Parts & Labor Comments	#50718 - foreign substance on mylar giving high background, had to replace mylar.

Item	Parts/Labor Association	Qty.	Rate	Amount
Part - 78 - Low Range Compensated GM with shield (LND71210)	78 #301045	1	233.11	233.11
Labor - Standard Hourly Rate - 2016	78 #301045	0.5	99.00	49.50
Labor - Standard Hourly Rate - 2016	2929 #50718	1	99.00	99.00
Part - 43-93 - Mylar window (3 layers of 0.4mg)	43-93 #295922	1	47.41	47.41
Labor - Standard Hourly Rate - 2016	43-93 #295922	0.5	99.00	49.50
Part - RO-20 - Meter movement (200uAmp)	RO-20 #6273	1	187.01	187.01
Labor - Standard Hourly Rate - 2016	RO-20 #6273	0.5	99.00	49.50

Total \$715.03

Sample invoices have been provided and will be factored in how we develop out the invoices.

Email Initial Comments for Consideration (for developers context)

Initial comments. I'm meeting with Sandy and Jeff today to discuss, but wanted to get these on the table as their initial feedback. We still want to stay within the standards of an ecommerce site and minimize customizations, but these initial comments seem reasonable expectations for the module.

If I understand everything on the attached correctly, here are my comments so far. Some of this may be assumed because of discussions with Greg, but, I'm including to be sure we're all on the same page.

- Serial numbers would have to be imported into BigCommerce first so they can be added to a work order.
- Issue Date = Ship Date

All work orders will need these custom fields for invoicing purposes:

1. Work Order Type
 1. Rental
 2. Calibration/Repair
1. Payment Type
 1. Purchase order/Project # (where the customer would enter PO# if external or Project # if internal in this field)
 2. Credit Card
1. Date fields
 1. Date Issued (for rental & calibration orders)
 2. Date Returned (rental)
 3. Date Received (calibration) – can use same field and just call it Returned for rental and Received for calibration
 4. Paid to Date
 5. Prev PTD
1. Customer Category
 1. External
 2. Internal
1. Discount Rate (used for external lease customers, internal discounts would be via the script based on length of rental in the work order)

For rental work orders only, we also need a field for Related Rental Item (where script automatically records the serial number the rental fee is for) & a rental fee field that will have the rental fee that is applicable to the serial number.

Now to the attached document:

Page 1, Order Management Screen section (middle of page)

- Regarding #4 Customer - I'm sure this was intent, but it would need to be full customer info, not just name, since we have had some customers in the past that were with the same company, but were completely separate departments/projects with separate shipping/billing info & payment methods.
- Regarding #5 Status – couple of things:
 - So this looks like it is a status for each individual serial number to determine whether to charge rental that month or not, correct? Note: This wouldn't be applicable to calibration orders so I'm assuming it would only be added to the rental work order layout/format.
 - How would these individual statuses be updated?
 - Returned – could be automated once a return date is entered for the serial number
 - Partially Returned – wouldn't be applicable to individual serial number
 - Repair (see bullet below) – I would manually change to repair if needed
 - Out for rental – automated based on serial number being issued on outgoing packing list
 - Is Repair intended for the 1st bullet? If for 2nd or 3rd bullet, please see those for explanation.
 - Is this meant for the occasional time when we stop rental temporarily because we've had the customer send the instrument to the vendor for repair? Then when we've been notified the instrument is repaired and sent back to the customer, we start the rental back up? If so, from the paragraph that starts with "When the order is expanded...: it sounds like we would pause (temporarily stop rental) on individual serial numbers as needed without stopping rental on the rest of the serial numbers in the order. Then would we change the status of that serial number back to out for rental to restart the rental fees?
 - If this was meant for rental return repairs, in the past, we manually typed these up as needed.
 - If this was meant for repair & return to customer, customer just places order for replacement and sends the original instrument back to us for rental return. If repairs needed, we type up rental return repair, invoice those charges and return instruments back to our stock for new rental orders.
- Regarding #6 Days out (months) – couple of things
 - The weekly/monthly rental rates start with the Issue Date, not the date of the order. Sometimes customers order rentals a month or two in advance of need and, of course, customers' plans can change so we start the rental with the outgoing packing list date.

- What will we & the customer see on the order/invoice, etc? Days, Weeks or Month? We don't want a customer seeing they rented something for 15 days when all we are concerned about is weekly/monthly and we don't want customers asking us for daily rentals if we don't do daily rentals.
- Regarding #8 Current Total – again, just making sure I'm not misreading or anything, current total on the monthly invoice would only be what was owed that month, not total for order, since not all serial numbers would necessarily bill every month (some may have been returned months ago, some may not be at 16 days yet, some may be temporarily not billing per Management for some reason like repair needed, etc.)

Page 2 – customer invoices would need to display every serial number.

Need parts/labor comments section (for both work order types) so we can add any type of notes to explain credits, repair charges, etc. This would print on the monthly invoice.

Page 3 looks to be Daryl/Accounting's screen so I don't have comments for this.

Who would have access to this screen? The techs don't want to mess up anything so would they add serial numbers, etc. in the Big Commerce Orders View screen or would they add in the beapartof screen? Maybe with these permissions or something:

- Techs – can't delete
- Admin – can delete if necessary