# Purpose

This procedure covers maintaining a rental contract as new information becomes available and further action is required. The tasks covered are all standalone tasks.

# Pre-requisites

* An active rental contract
* For re-opening, contract is in closed status

**What is covered in this guide**

[Task 1. Add a misc. charge to an active contract 2](#_Toc529514954)

[Task 2. Add a stand down period 5](#_Toc529514955)

[Task 3. Complete an equipment swap 8](#_Toc529514956)

[Task 4. Re-open a closed contract 11](#_Toc529514957)

[What next? 13](#_Toc529514958)

# Terminology

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| **EMR** | Equipment movement record |

# Use of icons

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|  | **Business rule** |  | **Key point / Tips** |  | **Information** |

1. Add a misc. charge to an active contract

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| 1. Navigate to the relevant Contract details page   Select **Contract > Status > Created** |
| 1. In the **Contract line** section, select **Rental fee** line   Select appropriate option:   * + **Add misc. charge–recurring** charge will appear on every invoice   + **Add misc. charge–supplemental** charge will generate a separate invoice   + **Add misc. charge–once** charge will only be invoiced once |
| 1. C:\Users\FELICI~1\AppData\Local\Temp\SNAGHTML18762ee.PNGFrom the **Rental template line** drop-down menu, select type of charge |
| 1. Adjust **Unit price**   C:\Users\FELICI~1\AppData\Local\Temp\SNAGHTML93f356.PNGPress **Enter** on keyboard |
| 1. Press **F5** to refresh |
| 1. Repeat Steps 3 and 5 if more charges are to be added |

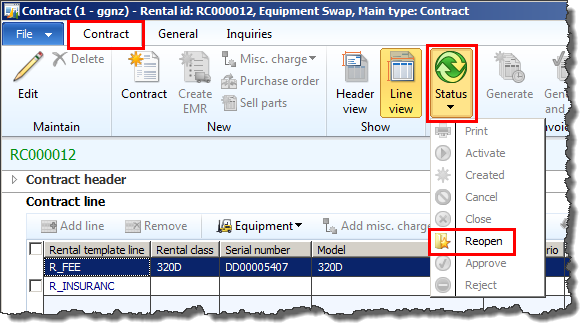
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| 1. Select **Header view > Invoicing** fast tab   Select **Edit**  Check and amend the **Inv. Info** as necessary to reflect the extra charges added |
| 1. C:\Users\FELICI~1\AppData\Local\Temp\SNAGHTMLaebd49.PNGOnce all charges have been added, select the **Contract** tab **> Status > Activate** |
| Once a charge has been added, an invoice needs to be generated. See **REN\_2.3\_Create Rental Invoice** for details |

1. Add a stand down period

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| 1. Navigate to the relevant Contract details page   Select **Contract > Status > Created** |
| 1. In the Contract line section, select **Add misc. charge > Add Misc. charge once** |
| 1. From the **Rental template line** drop-down menu, select **R\_STND DWN** |
| 1. In the R\_STND DWN line, complete the following fields:    1. Enter a quantity of -1    2. Enter a **Unit price** (i.e. how much is discounted on the contract)    3. Press F5: refreshes the **Net amount** to show a negative amount    4. Adjust the **Invoice from** and **Invoice until** dates to make sure it is the correct invoicing period to display on the invoice |
| 1. Open the **Contract** tab   Select **Status > Print**  Select **Status > Activate** |

1. Complete an equipment swap

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| 1. Navigate and open   **GGNZ > Rental > Common > All contracts** |
| 1. Filter to find the rental contract id, double click the contract id to open    * You will now see the Contract details displayed |
| 1. Create inbound EMR for the current equipment.   This is covered in **SOP REN\_2.7\_Managing Rental EMR** refer to the full SOP if you have not completed this process before. Here is a summary of the steps if you only require a quick reminder of the process.   * + 1. Open GGNZ > Rental > Common > Rental Contracts > All contracts     2. Filter and find rental contract, double click the id to open     3. Select create EMR     4. Tick the marked checkbox     5. Confirm that the direction is Inbound     6. Select Create EMR     7. Select edit     8. Enter a delivery/ Pickup date     9. On the EMR Lines fast tab enter, To (details of warehouse receiving equipment), SMU and Fuel level     10. Select edit to exit editing mode     11. Select Schedule delivery/pickup > Schedule     12. Select Yes to SMU dialogue box     13. Close info log advising that EMR task was successful     14. Select Receive     15. Select Yes to SMU dialogue box     16. Close the Infolog that lets you know that two journals have been posted     17. Close EMR screen   Refer to SOP **REN\_2.7\_Managing Rental EMR** when equipment is returned for further details on what to do. |
| 1. Check to see if there are invoices that have not been invoiced    1. Open **Inquiries** tab,    2. Select **Invoice schedule**    3. Either post or delete for more details see SOP **REN\_2.3\_Create a rental invoice** |
| 1. In the Contract line section, select **Equipment > Swap**   C:\Users\FELICI~1\AppData\Local\Temp\SNAGHTML158630d.PNGThe **Swap equipment** window opens |
| 1. Complete the following:    1. From the **Equipment to be swapped** drop-down menu, choose the current equipment in the contract    2. From the **New equipment** drop-down menu, choose the replacement equipment    3. Enter the **Date** of the swap    4. Tick the **Physical swap** box    5. Select **OK** |
| An Infolog opens   1. Select **Close** |
| You can filter equipment in the drop-down menus by pressing **Ctrl + G** and entering the filters |
| 1. Complete an outbound EMR   Refer to SOP **REN\_2.7\_Managing Rental EMR** |
| To view details of all equipment that has been on contract for a customer:   1. Open customer account   Go to **Accounts receivable > Common > Customers > All customers** |
| 1. Select **Equipment management tab > Rental/lease contract** |
| 1. The rental/lease contracts for that customer will display |

1. Re-open a closed contract

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| 1. Navigate to the contract:   **GGNZ > Rental > Common > Rental contracts >** followed by either:   * **All contracts:** list of all contracts * **All active contracts:** list of active contracts only * **My contracts:** list of contracts you have created |
| 1. Double click on correct **Contract id**    * C:\Users\FELICI~1\AppData\Local\Temp\SNAGHTML1777dae.PNGYou will now see the Contract details displayed |
| 1. Select **Contract > Status > Reopen** |
| You can only add misc. lines to a re-opened contract  A rental contract can only be re-opened once! |
| 1. Complete **Steps 2–7** |
| **Add misc. charge – supplemental** is the only option available to a re-opened contract  For a supplemental charge for a reopened contract, you must close the contract once you have invoiced the charge |
| 1. Once invoicing is complete, select **Status > Close** |
| Remove equipment window appears   1. Select **OK**   Contract Status will change to **Closed** |

What next?

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| Create an invoice | REN\_2.3\_Creating Rental Invoices |
| Create outbound EMR for the swapped (replacement) equipment | REN\_2.7\_Managing Rental EMR |
| Invoice swapped equipment | REN\_2.3\_Create Rental Invoices |