Rental Application User Manual

Detailed Guide to General Functionalities

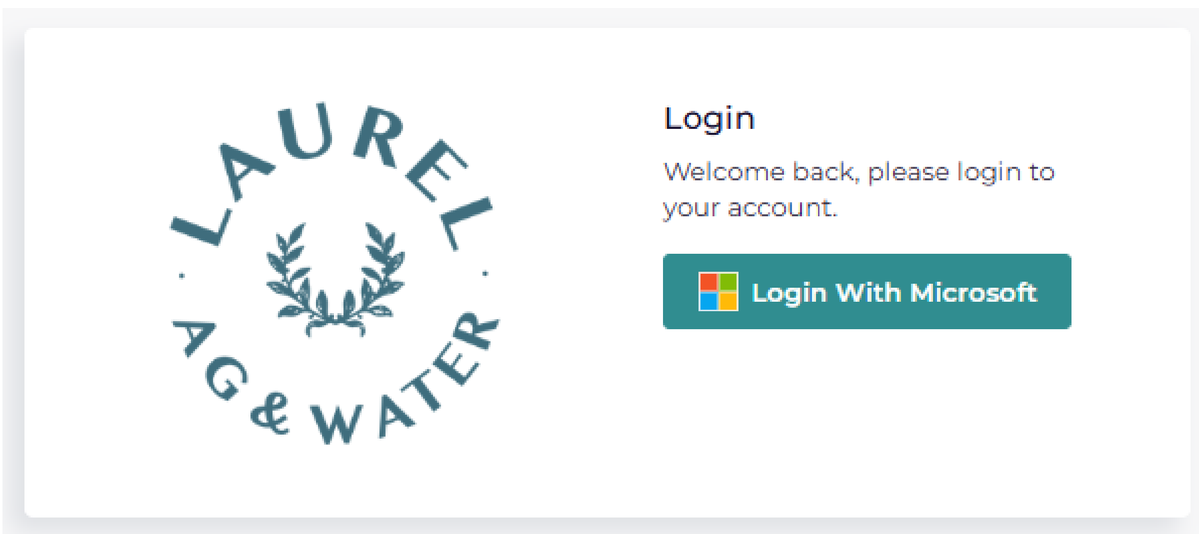
Introduction

Welcome to the Rental Application User Manual. This comprehensive guide will help you navigate and use the Rental Application effectively. The application streamlines the process of managing equipment utilization by following organized 8-stage process, from creating order to inspecting equipment returned from customer.

This manual provides detailed instructions for each feature and process within the application, whether you're a new user or need a refresher on specific functionality, you'll find the information you need in the relevant sections.

Getting Started

1. *Login Screen*



Purpose: *The Rental Application uses secure authentication through your Microsoft account. This integration ensures that only authorized users can access the system while providing a streamlined login experience. When you navigate to the application, you'll be presented with the login screen shown above.*

Link to application here.

Functionalities:

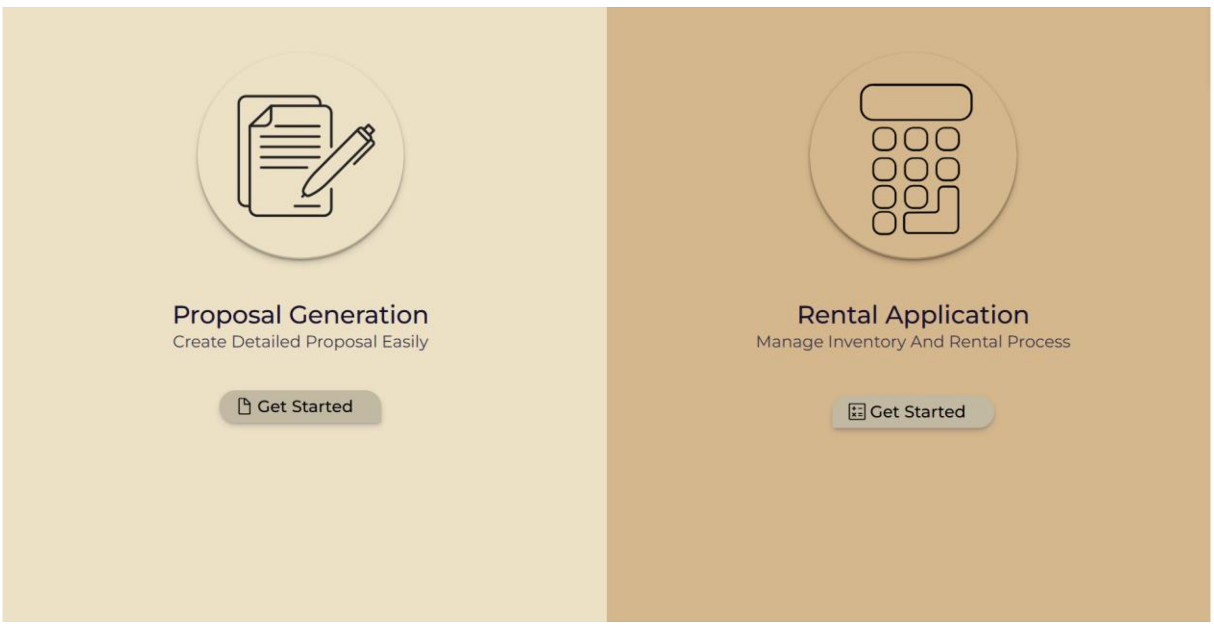
- *Integration with Microsoft accounts for seamless single sign-on.*
- *Automatic login for users already authenticated with their Microsoft accounts.*
- *Redirects users to the Microsoft login page if they aren't signed in.*
- *Shows an error message if the user lacks the required permissions to access the application.*

Buttons and Actions:

- ***Login with Microsoft:*** *The single sign-on integration with Microsoft accounts means you may be automatically logged in if you're already authenticated in your Microsoft account. If not, you'll need to click the "Login with Microsoft" button, which redirects you to Microsoft's login page.*
- ***Error Message Display:*** *If you lack the necessary permissions to access the application, an error message will display showing "Access Denied" and advising you to contact your administrator for access.*

Additional Notes: *Note that users are automatically logged out after 60 minutes of inactivity as a security measure. If you have Microsoft's two-factor authentication enabled, you may need to complete additional verification steps during the login process. Once logged in, your authentication applies to the entire session, and you won't need to log in again for each screen unless you manually log out or your session expires.*

2. Landing Page



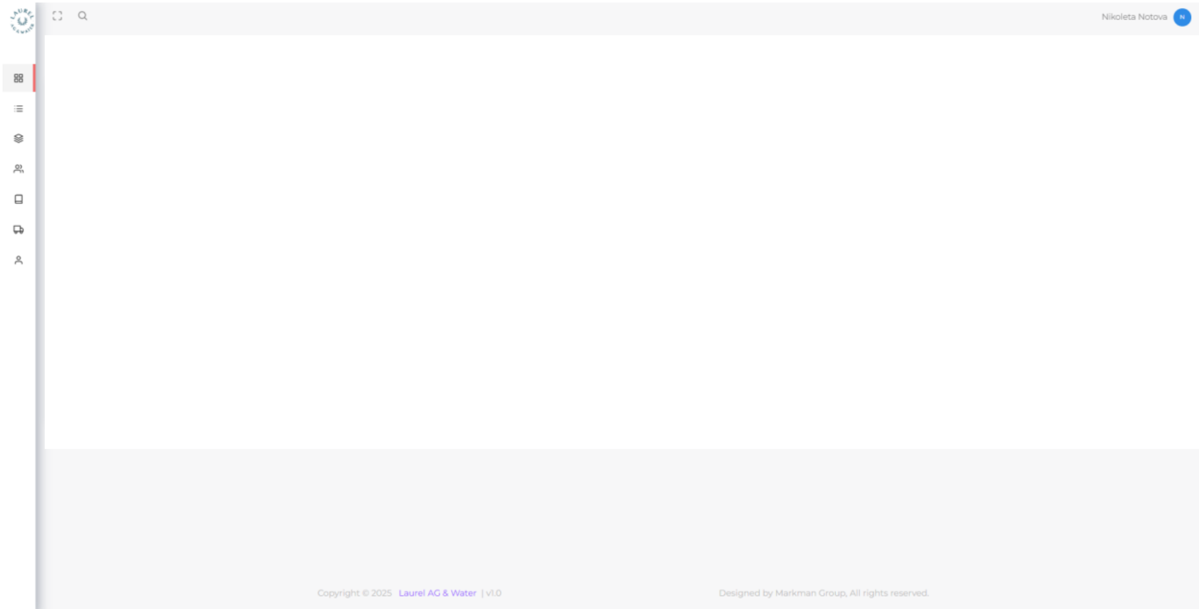
Purpose: *After successfully logging in, you'll be directed to the Landing Page as shown above. This page serves as the gateway to the application's main functions.*

Functionalities:
- *Provides options for Proposal Generation and Rental Application.*
- *Clicking "Get Started" under Rental Application launches the Rental Application.*

Buttons and Actions:
- ***Get Started (Rental Application):*** *To begin working with the Rental Application, simply click the "Get Started" button on left side. This will open the Rental Application interface where you can manage your equipment and create orders.*

Additional Notes: *The Landing Page displays options for Proposal Generation and Rental Application. For the purposes of this manual, we will focus solely on the Rental Application functionality, as the Proposal Generation is outside the scope of this document.*

3. *Interface Overview*



Purpose: *Upon clicking **"Get Started,"** you'll be directed to the **Rental Application Home Page**, which provides a **map-based overview of material locations**. The main purpose of this screen is to allow users to visually track where rental materials are located — whether at a **Warehouse** or a **Customer site** — via interactive pins.*

Functionalities:

- *Navigation Panel: The Navigation Panel on the left side provides access to all sections and functionalities within the Rental Application. This panel can be expanded (static) or auto-hidden, depending on the direction of the arrow toggle.*
- *Search Icon: A Search Icon that allows you to search for orders using their order number.*
- *Full Screen Mode: A Full Screen Mode toggle to expand the application view.*
- *User Account Options: User Account Options in the top-right corner, showing your name and initials (if available). Clicking on your account options reveals additional choices:*
    - *Switch to Proposal Application*
    - *Logout Option*

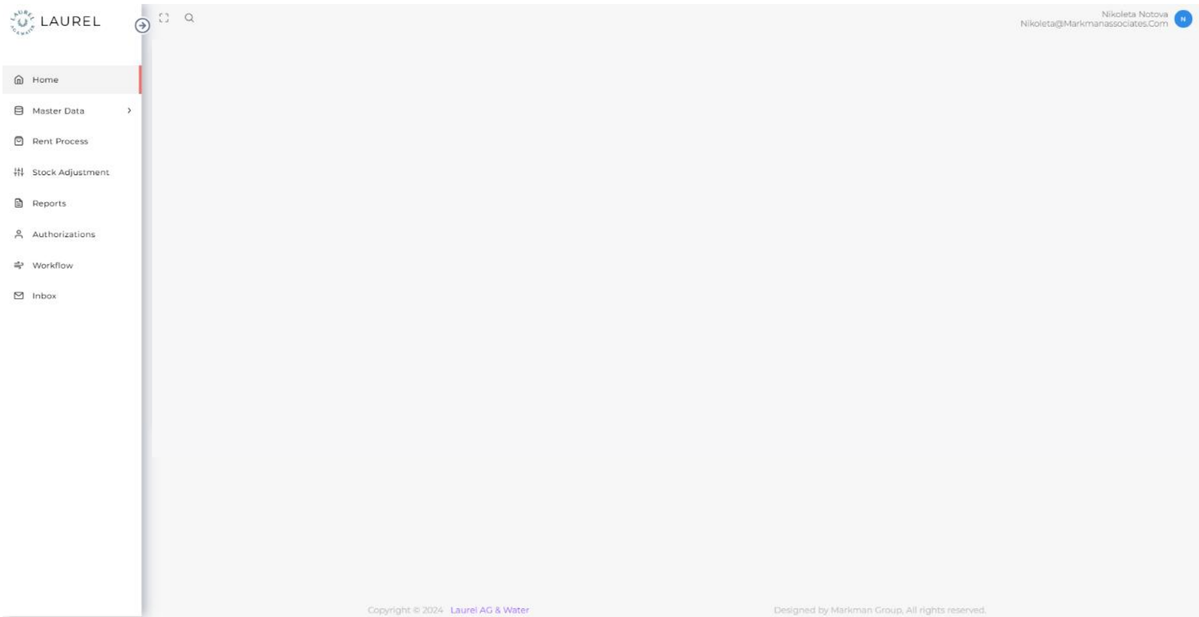
Buttons and Actions:

- Arrow Toggle: *Controls the visibility of the navigation panel.*
- Map Actions: *Accessible in the Home Page (Map) section.*
- ***Switch to Proposal Application:*** *Redirects to the Proposal Application home page (out of scope).*
- Logout: *Ends your session.*

Additional Notes: *The overall design emphasizes usability with clear visual hierarchy and intuitive navigation elements. As you work within the application, this main interface will remain consistent, with only the central content area changing based on your selected function.*

Navigation and Common Features

1. Navigation Panel



The navigation panel on the left side of the screen is your primary means of moving between different sections of the application. It provides access to all main functional areas, allowing you to quickly switch between tasks.

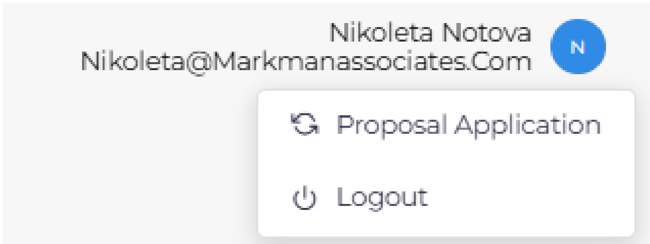
You can control the display of this panel using the arrow toggle button. When expanded, the panel remains visible at all times, providing easy access to navigation options. When collapsed, it provides more screen space for your main work area.

The navigation panel includes links to:

- *Home: Landing page with map view showing material locations.*
- *Master Data: Manage products, accounts, warehouses, and customers.*
- *Rent Process: Track orders and (return) deliveries of rental process.*
- *Stock Adjustments: Serves as warehouse with functionality to update inventory levels.*
- *Reports: Access rental and inventory reports.*
- *Authorization: Manage user roles (admin only).*
- *Workflow: Configure process flow roles (admin only).*
- *Inbox: View and act on open tasks.*

Each of these options opens its corresponding screen in the main content area when selected. The currently active section is highlighted in the navigation panel for easy reference.

2. User Account Options



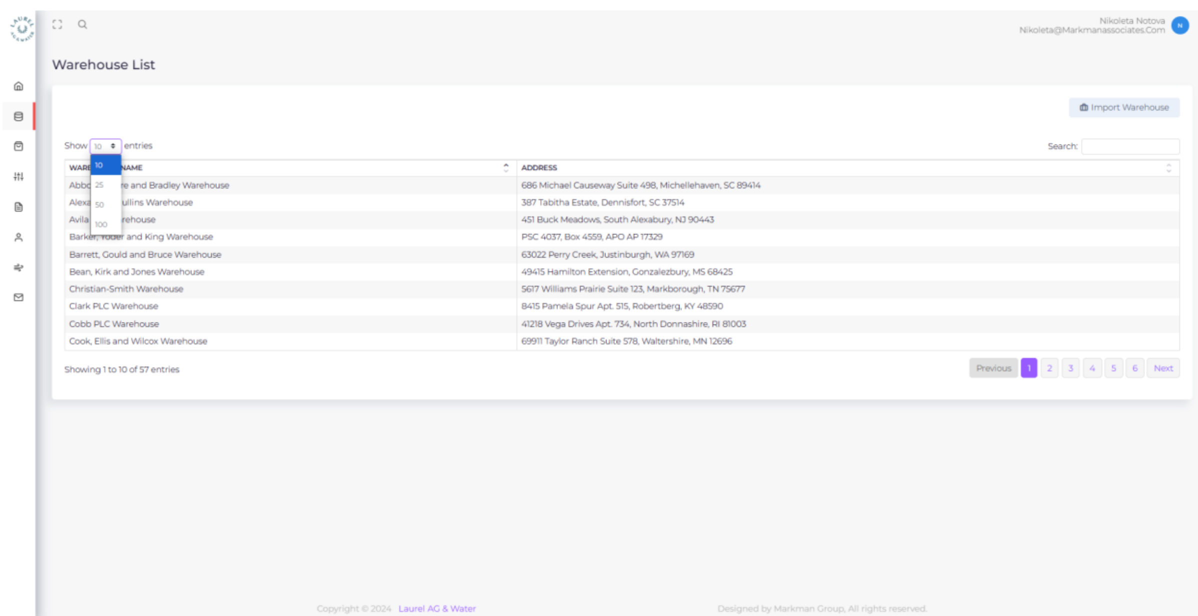
In the top-right corner of the screen, you'll find your user account identifier, typically showing your name and initials (if available). This area provides access to account-related functions.

When you click on your name or initials, a dropdown menu appears with the following options:

- *Switch to Proposal Application: This option redirects you to the Proposal Application home page. Note that the Proposal Application functionality is outside the scope of this manual.*
- *Logout: Selecting this option logs you out of the Rental Application entirely. You'll need to log in again using your Microsoft credentials to continue working in the application.*

The account options area also visually confirms which user is currently active in the system, which is particularly useful in shared workstation environments.

3. Common Table Features



Throughout the application, you'll encounter data tables that share common functionality designed to help you efficiently work with large datasets. Understanding these common features will help you navigate all sections of the application more effectively.

Tables in the Proposal Application include sophisticated data management capabilities:

Pagination and Entries Display:

At the top of each table, you'll find pagination controls that allow you to navigate through multiple pages of data. You can select how many entries to display per page using a dropdown menu, with options typically including 10, 25, 50, and 100 entries. This flexibility allows you to view more data at once on larger screens or focus on fewer items on smaller displays.

At the bottom of each table, you'll find page navigation controls that allow you to move to the first, previous, next, or last page of results.

Sorting Capabilities:

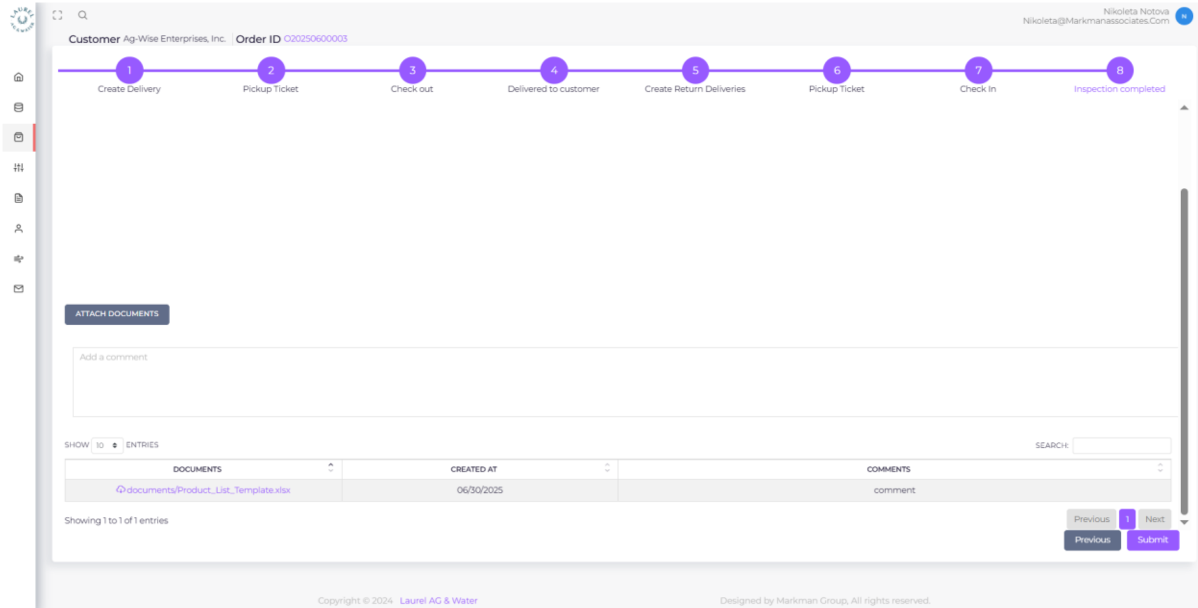
Selected tables in the application support sorting by clicking on column headers. Clicking once sorts the data in ascending order based on that column; clicking again reverses the sort to descending order. A small arrow indicator appears in the column header to show which column is being used for sorting and in which direction.

This sorting functionality works for all data types, including text, numbers, and dates, making it easy to organize information according to your needs.

Inline Table Search:

Located at the top-right of the table, this search bar allows users to quickly filter visible records based on keywords. As you type, the table dynamically updates to display only matching rows across all columns (e.g., warehouse name, address).

4. *Document Attachment Features*



Throughout the 8-stage rental process, each stage includes a consistent document attachment section at the bottom of the screen. This feature allows you to upload and manage files relevant to the current stage of your order (delivery or return delivery).

*The document attachment section consists of an "**Attach Documents**" button, a comment input field, and a documents table. When you click "**Attach Documents**," you can select a file from your local device to upload. After selecting a file, you can add contextual notes in the comment field and save both the document and comment together.*

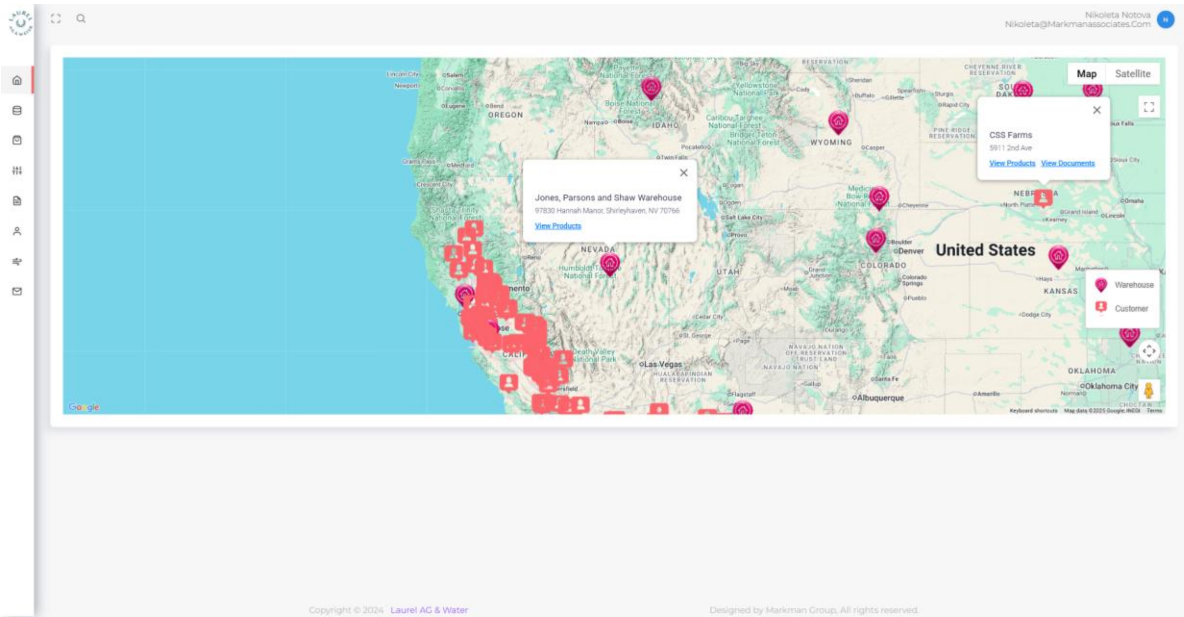
The documents table maintains a log of all attached documents and their associated comments. Each entry in the table includes:

- *The document name (hyperlinked for easy downloading)*
- *A date showing when the document was uploaded*
- *Any comments provided at the time of upload*

This consistent attachment functionality enables better documentation, collaboration, and traceability throughout the proposal creation process. You can reference these attachments in later stages or share them with colleagues working on the same proposal.

Detailed Guide to Main Sections

Home (Map)



Purpose: *The **Home page** provides a **map-based overview** of all rental activity locations. It allows users to visually track where rental materials are currently located — either at a **Warehouse** or with a **Customer**. This screen acts as the operational entry point of the Rental Application.*

Functionalities:

- *The central screen displays a Google Map populated with pins indicating the location of:*
  - *Warehouses (icon: factory symbol)*
  - *Customers (icon: person symbol)*
- *Users can toggle between Map and Satellite views, zoom in/out, and reposition the map using Google Maps tools.*
- *Clicking a pin opens a pop-up card with key location details (e.g., name, address). In some cases, users can:*
  - ***View Products** stored at the selected warehouse/customer site*
  - ***View Documents** (if applicable)*

Buttons and Actions:

- ***Map Legend Toggle:** Shows/hides warehouse and customer pins.*
- ***Pin Interaction:** Click to view detailed info, with links to products and documents if available.*
- ***Map/Satellite Switch:** Toggle between standard and satellite views.*

Additional Notes: *This map acts as a real-time status board, replacing traditional list views with geographic insight. It is especially useful for logistics, planning, and warehouse/customer coordination. As the Home screen, it remains persistent until another module is selected from the navigation panel.*

Master Data

1. Warehouse Product List

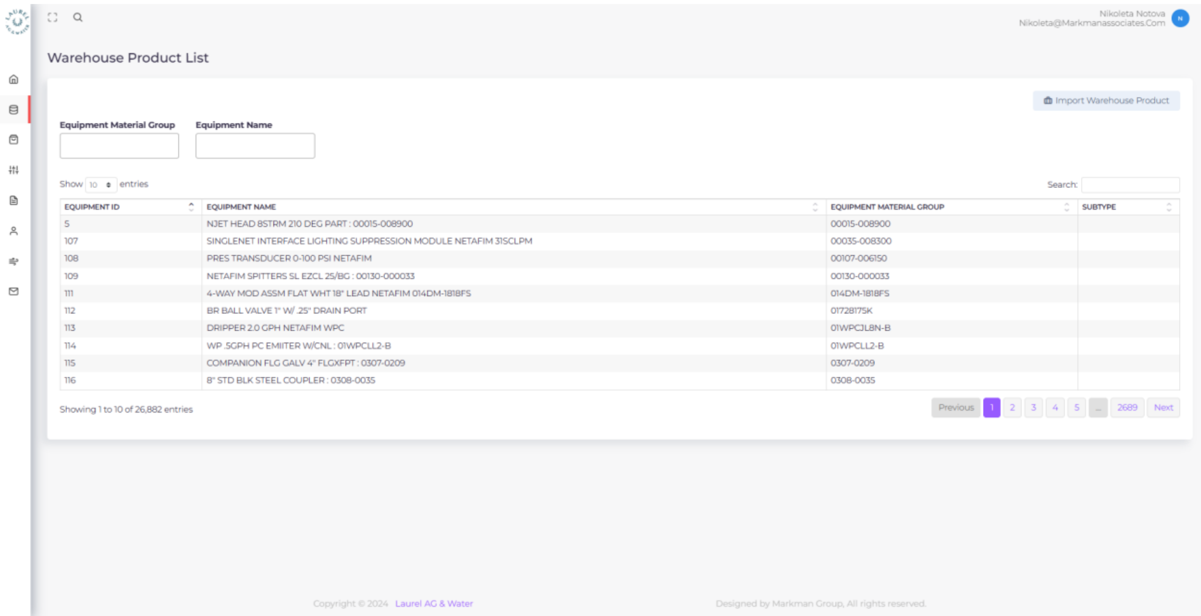


Table Content:

The Warehouse Product List is organized into a table with the following columns:

- ***Equipment ID**: unique identifier for each product*
- ***Equipment Name**: full name and description of the item*
- ***Equipment Material Group:** material group code*
- ***Subtype**: optional classification field*

Buttons and Actions:

- ***Search Filters** allow users to narrow results by entering keywords or partial matches.*
- ***Import Warehouse Product:** Opens a file upload dialog for importing data.*
- ***Filter/Search Fields:** Enter values to refine visible records.*
- ***Sort Columns:** Click column headers to re-order list.*

Importing Products

You can update the product catalog by clicking the "Import Warehouse Product" button, which allows you to upload product information via Excel (.xlsx, .xls) or CSV (.csv) files. For importing, please use following template:

Warehouse Product List - Template.xlsx

2. *Warehouse List*

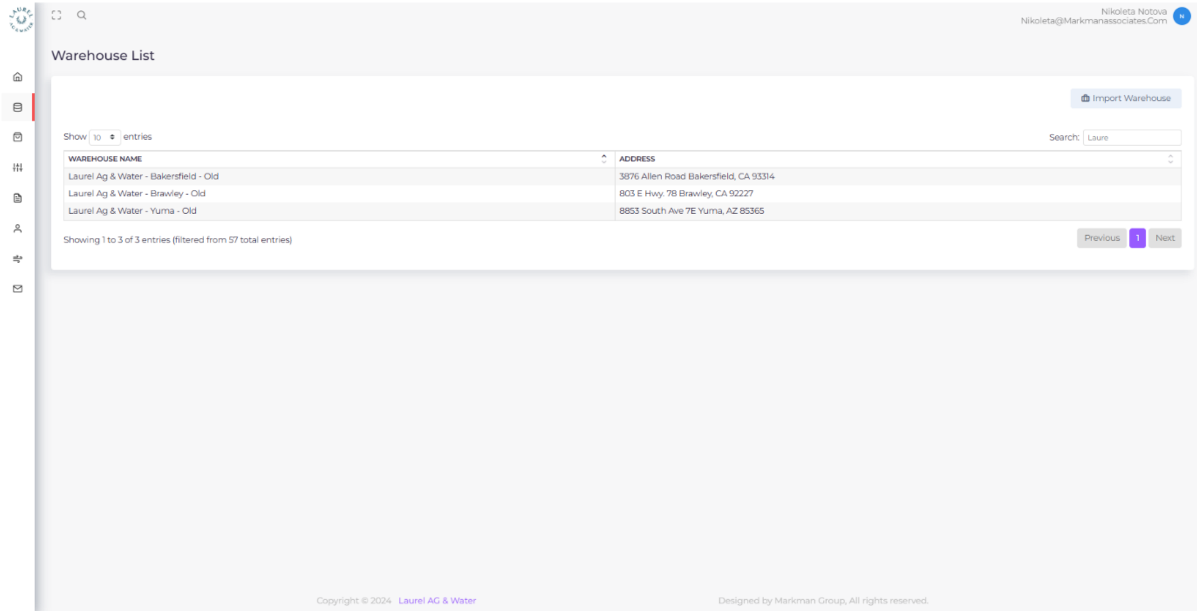


Table Content:

The Warehouse List is organized into a table with the following columns:

- ***Warehouse Name**: name of the warehouse location*
- ***Address**: full address of the warehouse*

Buttons and Actions:

- ***Search Filters** allow users to narrow results by entering keywords or partial matches.*
- ***Import Warehouse:** Opens a file upload dialog for importing data.*
- ***Filter/Search Fields:** Enter values to refine visible records.*
- ***Sort Columns:** Click column headers to re-order list.*

Importing Warehouse

You can update the warehouse list by clicking the "Import Warehouse" button, which allows you to upload warehouse information via Excel (.xlsx, .xls) or CSV (.csv) files. For importing, please use following template:

Warehouse List Template.xlsx

3. *Account Manager List*

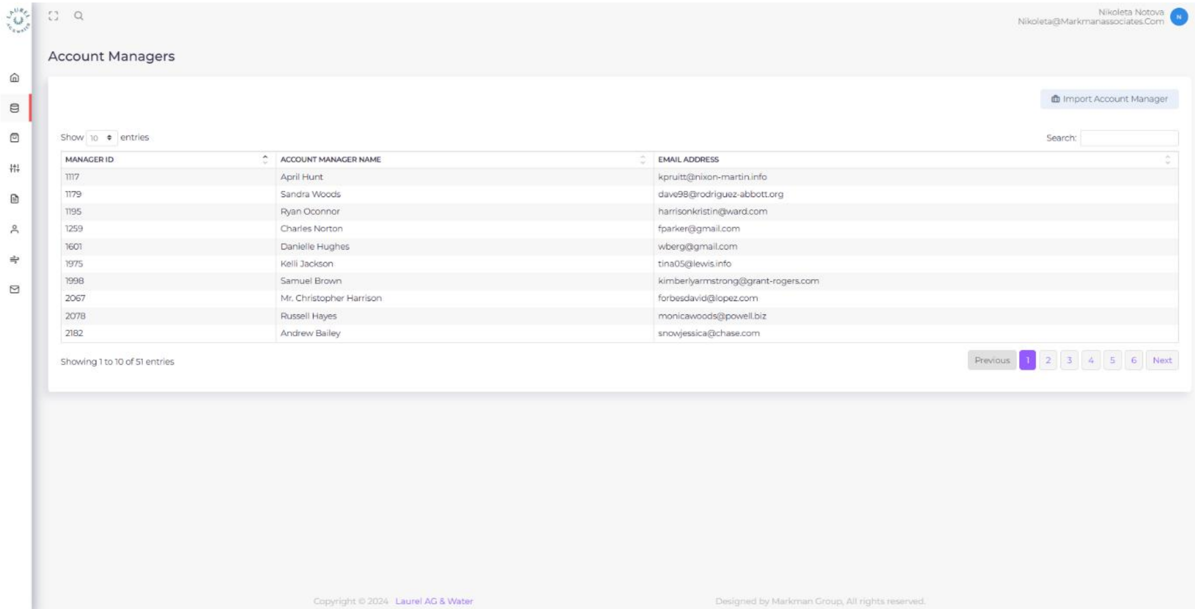


Table Content:

The Account Managers is organized into a table with the following columns:

- ***Manager ID** – Unique system identifier for each account manager.*
- ***Account Manager Name** – Full name of the assigned representative.*
- ***Email Address** – Contact email used for internal or customer communication.*

Buttons and Actions:

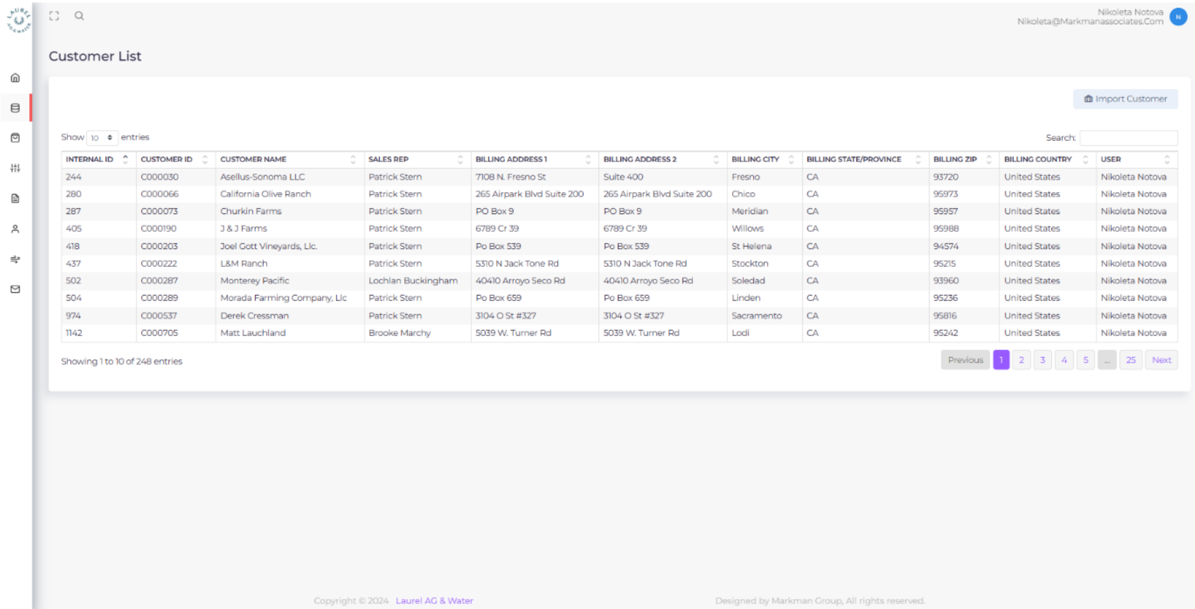
- ***Search Filters** allow users to narrow results by entering keywords or partial matches.*
- ***Import Account Managers:** Opens a file upload dialog for importing data.*
- ***Filter/Search Fields:** Enter values to refine visible records.*
- ***Sort Columns:** Click column headers to re-order list.*

Importing Account Managers

You can update the account manager list by clicking the "Import Account Manager" button, which allows you to upload account manager information via Excel (.xlsx, .xls) or CSV (.csv) files. For importing, please use following template:

Account Manager List - Template.xlsx

4. Customer List



INTERNAL ID	CUSTOMER ID	CUSTOMER NAME	SALES REP	BILLING ADDRESS 1	BILLING ADDRESS 2	BILLING CITY	BILLING STATE/PROVINCE	BILLING ZIP	BILLING COUNTRY	USER
244	C000030	Asellus-Sonoma LLC	Patrick Stern	7108 N. Fresno St	Suite 400	Fresno	CA	93720	United States	Nikoleta Notova
280	C000066	California Olive Ranch	Patrick Stern	265 Airpark Blvd Suite 200	265 Airpark Blvd Suite 200	Chico	CA	95973	United States	Nikoleta Notova
287	C000073	Churkin Farms	Patrick Stern	PO Box 9	PO Box 9	Meridian	CA	95957	United States	Nikoleta Notova
405	C000190	J & J Farms	Patrick Stern	6789 Cr 39	6789 Cr 39	Willows	CA	95988	United States	Nikoleta Notova
418	C000203	Joel Gott Vineyards, Llc.	Patrick Stern	Po Box 539	Po Box 539	St Helena	CA	94574	United States	Nikoleta Notova
437	C000222	L&M Ranch	Patrick Stern	5310 N Jack Tone Rd	5310 N Jack Tone Rd	Stockton	CA	95215	United States	Nikoleta Notova
502	C000287	Monterey Pacific	Lochlan Buckingham	40410 Arroyo Seco Rd	40410 Arroyo Seco Rd	Soledad	CA	93960	United States	Nikoleta Notova
504	C000289	Morada Farming Company, Llc	Patrick Stern	Po Box 659	Po Box 659	Linden	CA	95236	United States	Nikoleta Notova
974	C000537	Derek Cressman	Patrick Stern	3104 O St #327	3104 O St #327	Sacramento	CA	95816	United States	Nikoleta Notova
1142	C000705	Matt Lauchland	Brooke Marchy	5039 W. Turner Rd	5039 W. Turner Rd	Lodi	CA	95242	United States	Nikoleta Notova

Table Content:

The Customer List is organized into a table with the following columns:

- ***Internal ID*** *– System-generated identifier.*
- ***Customer ID*** *– External/customer reference ID.*
- ***Customer Name*** *– Full legal name of the customer.*
- ***Sales Rep*** *– Assigned sales representative for the customer.*
- ***Billing Address*** *– Includes address line 1, address line 2, city, state/province, ZIP, and country.*
- ***User*** *– Indicates which internal user created or manages the customer record.*

Buttons and Actions:

- ***Search Filters*** *allow users to narrow results by entering keywords or partial matches.*
- ***Import Customers:*** *Opens a file upload dialog for importing data.*
- ***Filter/Search Fields:*** *Enter values to refine visible records.*
- ***Sort Columns:*** *Click column headers to re-order list.*

Importing Customers

You can update the customer list by clicking the "Import Customer" button, which allows you to upload customer information via Excel (.xlsx, .xls) or CSV (.csv) files. For importing, please use following template:

Customer List - Template.xlsx

Rental Process

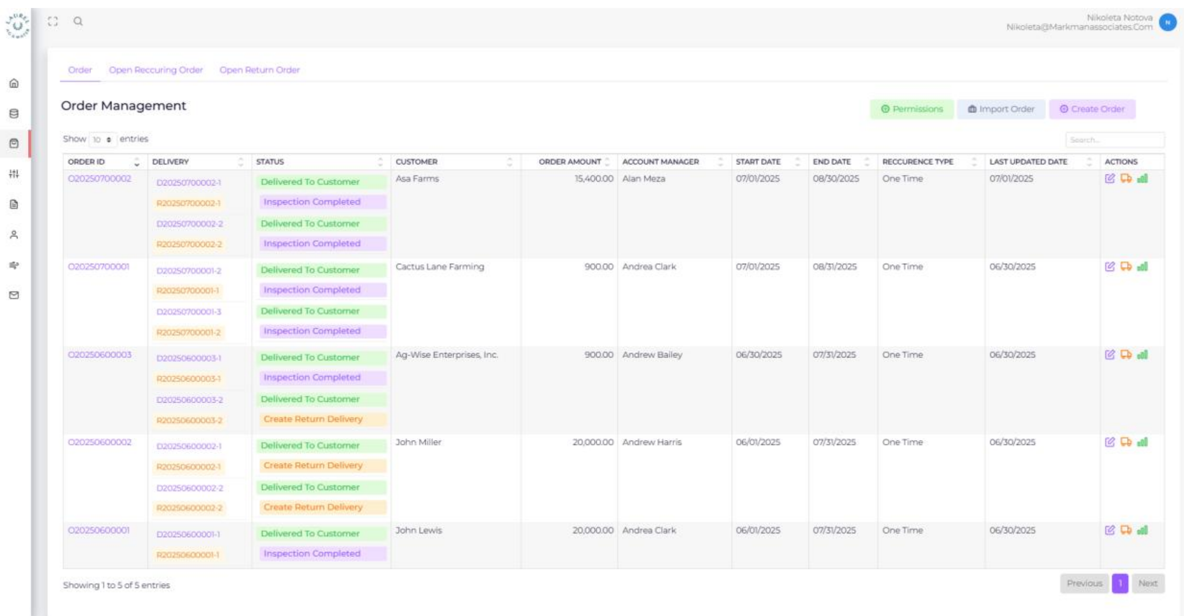
The Rental Application follows a structured multi-stage workflow designed to guide users through the full rental lifecycle. This methodical approach ensures that all required materials, tasks, and logistics are accurately captured, processed, and documented — enabling smooth execution, real-time tracking, and reliable equipment management.

As you progress through these stages, you'll notice visual indicators showing your current position in the workflow:

- ***Completed Stages*** *are marked with a purple circle containing the stage number.*
- ***In Progress Stages*** *appear as a white circle with a purple outline, showing the current stage number.*
- ***Not Started Stages*** *display as a white circle with a gray outline, indicating stages yet to be completed.*

Each stage builds upon the information provided in previous stages, creating a logical flow. Let's explore each stage in detail.

1. Order Management Page



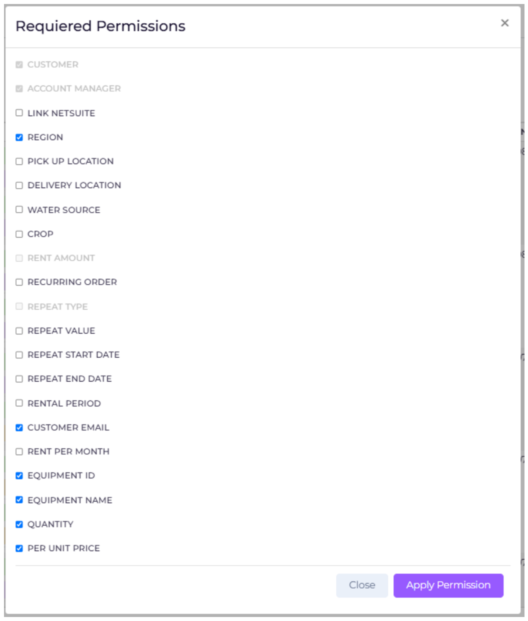
Purpose: *The Order Management screen serves as the central dashboard for viewing, creating, updating, and tracking all rental orders. It provides a high-level overview of delivery status, rental details, and customer-specific information.*

- ***Order:*** *Displays all standard one-time rental orders. This is the default view showing active contracts with start and end dates.*
- ***Open Recurring Order****: Filters and displays orders marked as recurring, typically used for long-term or automatically renewing rentals. These orders may have associated recurring billing or delivery schedules.*

- *Open Return Order: Shows all return deliveries that are in progress or pending. This tab is used to track equipment coming back from the customer site, including those awaiting inspection.*

Functionalities:

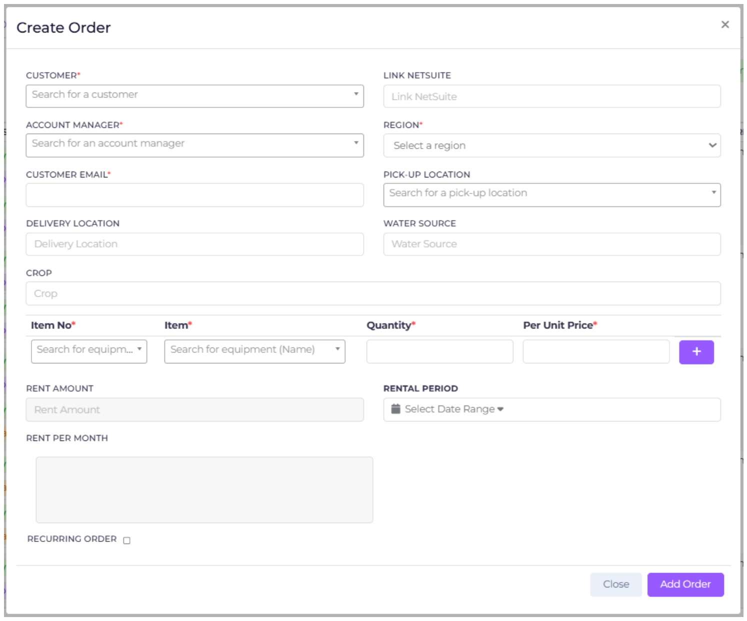
Permissions Button



*Opens the **Required Permissions** modal, which allows admins to configure the visibility of optional fields on the **Order Creation** form.*

- *Fixed Fields (Always Required & Cannot Be Modified):*
  - ***Customer** and **Account Manager** are always required and cannot be unchecked.*
  - ***Rent Amount** is calculated automatically based on item pricing and quantity, and cannot be marked as required or optional.*
  - ***Recurrence Type** is system-driven, determined by selections within the Rental Process. It is not user-configurable from this modal.*
- *Configurable Fields:*
  All other checkboxes in the modal can be checked or unchecked to adjust form visibility, such as:
  - *Region*
  - *Pick-Up Location*
  - *Water Source*
  - *Equipment Fields*
  - *Date Ranges*
  - *Pricing Details (e.g., Per Unit Price, Quantity)*
- *Apply Permission Button:*
  Saves the visibility configuration for future order creation sessions.

Create Order Button



*The **Create Order** form is used to initiate a new rental order. It requires selection of core customer and product details and enforces validations to ensure data consistency with master records and stock.*

Field Behavior and Logic:

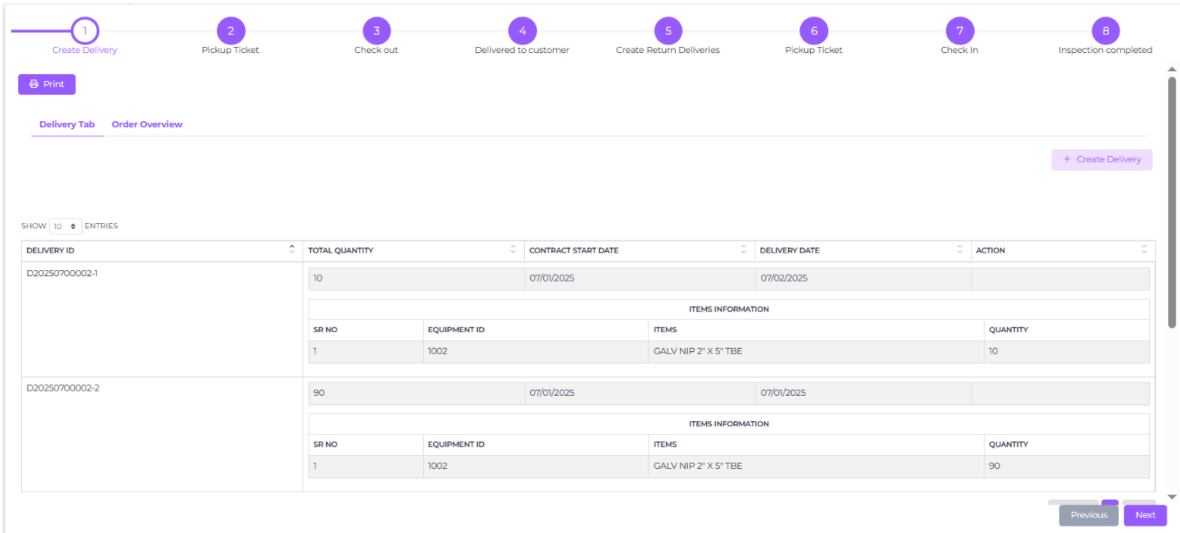
- ***Customer*** (Required)*: Dropdown linked to master customer data. Selecting a customer auto-populates the **Customer Email** field.*
- **Account Manager** *(Required)*: Dropdown sourced from internal user master. Must be selected to proceed.
- **Region**: Hardcoded list, not tied to master data.
- **Customer Email**: Auto-filled based on selected customer. Can be manually edited.
- **Equipment ID** and **Item Name**: Pulled from the Product List. If the selected material has no record in Stock Adjustment**,** an error will prevent the order from being created.
- **Rent Amount**: Auto-calculated: Quantity × Unit Price, summed across all lines.
- **Rent per Month**: Evenly splits the total Rent Amount across the months of the rental period. Displayed for user visibility but not editable.
- **Recurring Order**: Checkbox that flags the order for recurrence, triggering different handling in downstream processes.

***Import Order Button:** Allows batch order upload via .xlsx, .xls, or .csv file.*

***Edit Order:** The **Edit Order** button opens the full **Create Order** form, pre-filled with existing order details. Users can update any editable field, including item quantities, dates, and account manager.*

***Rental Process (Truck Icon):** Clicking the **Truck Icon** opens the **Rental Process** workflow for the selected order. From this view, users can manage the delivery lifecycle—starting with the **Create Delivery** step. The process follows defined rental stages, ensuring structured order fulfillment.*

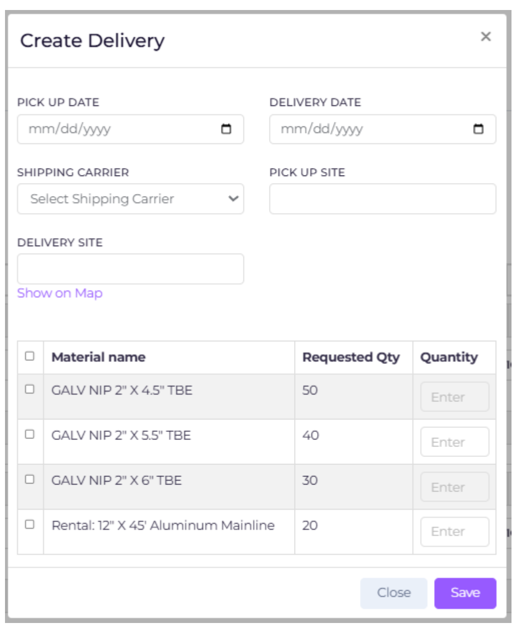
2. *Stage 1: Create Delivery*



The "Create Delivery" stage is the first step in the rental fulfillment workflow and can be accessed in two ways:

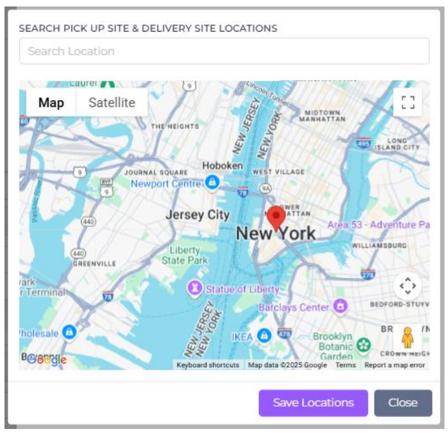
- ***From the Order Overview** by clicking on the order number hyperlink.*
- ***Directly via the truck icon** under the Actions column.*

Once in the Create Delivery module, users can manage and initiate physical delivery of equipment as defined in the rental order. The interface consists of several key components:

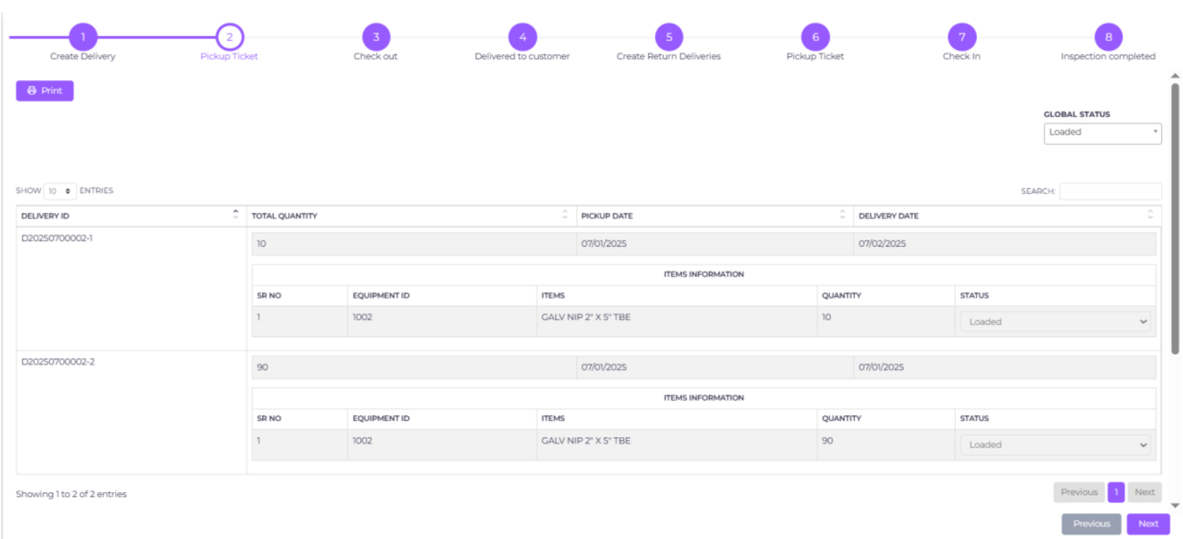


Form Fields & Logic

- ***Pick-Up Date / Delivery Date*** (Required)
  Defines the logistics timeline. These fields must be filled to proceed.
- ***Shipping Carrier*** (Dropdown)
  Select the delivery method.
  - *If **internal** is selected, the process continues normally.*
  - *If **external** is selected, a **PO Number field** appears and becomes **mandatory**. This ensures external logistics are traceable through purchase orders.*
- ***Pick-Up Site / Delivery Site***
  Both fields are text-searchable with map support:
  - *The **Delivery Site** includes a **"Show on Map"** function.*
  - *This opens a Google Maps integration where users can **pin the exact delivery location**, helping field teams locate sites precisely, even in rural or non-standard address areas.*



3. *Stage 2: Pickup Ticket*



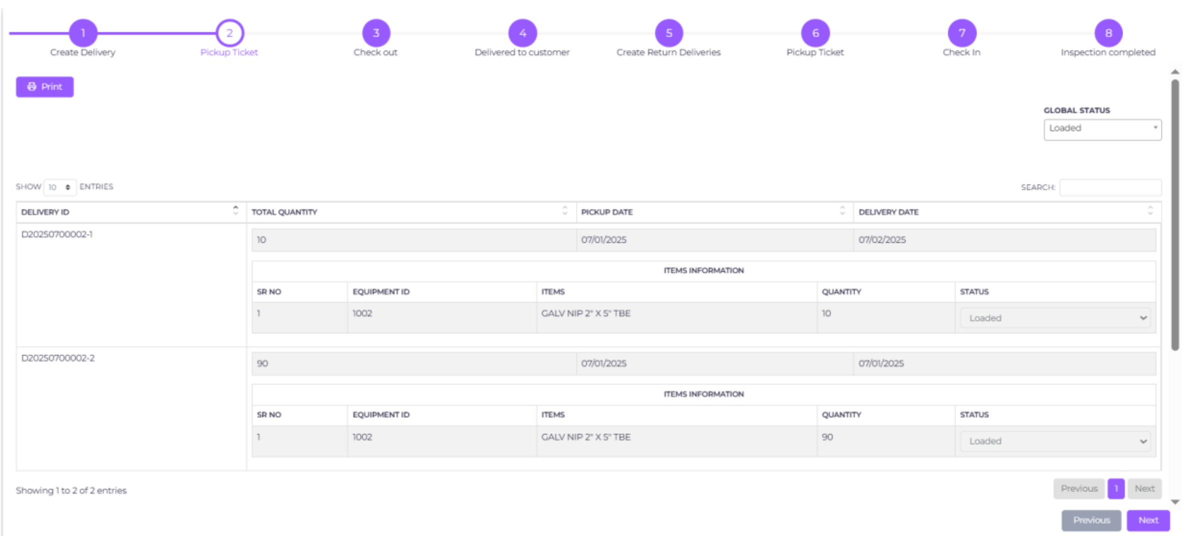
*The **Pickup Ticket** stage is used to confirm that materials are prepared and ready for transport. It reflects the action of loading items onto a truck or setting them aside for delivery.*

Key Functionalities

- ***Pickup Date*** (Required)
  *Users must confirm the **Pickup Date**, which may differ from the originally scheduled date. This reflects operational flexibility and real-time loading status.*
- ***Status Selection***
  *Each delivery line includes a **Status*** dropdown (e.g., *Loaded*, *None*, etc.) *to reflect current state.*
  - ***Global Status Dropdown** allows users to update all delivery lines at once.*
  - *Alternatively, users **can** manually update status per line item.*

*All values from **Stage 1 (Create Delivery)** are carried over automatically. Updates made here feed into downstream delivery and customer handover steps.*

4. Stage 3: Check Out



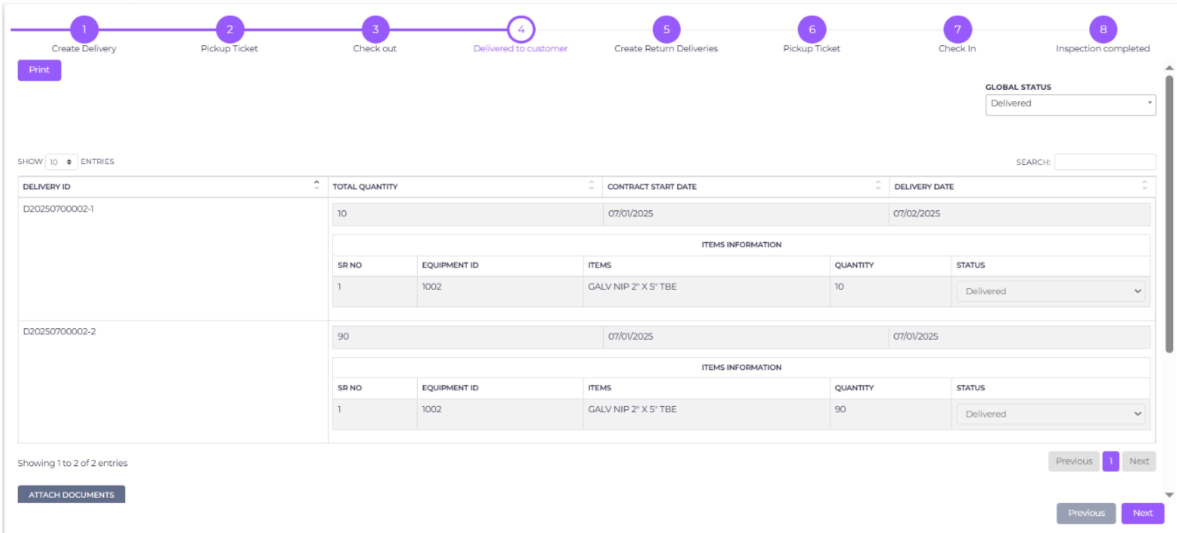
*The **Check Out** stage confirms that equipment or materials are officially released from the warehouse or staging area and are now in transit. It serves as the final verification before goods leave the site.*

Key Functionalities

- ***Check Out Date*** (Required)
  Must be set to validate the timing of physical release.
- ***Quantity Validation***
  - *Quantity fields are **editable** at this stage.*
  - *The system checks if the entered quantity matches the planned quantity.*
  - *If quantities **do not match**, the system **prevents progression** to the next stage.*
- ***Status Field***
  - *Each item line must have a **status set to "Check Out"** to confirm processing.*
  - *Similar to previous steps, a **Global Status** option allows batch updating of all lines at once.*

*All validations must pass before the system allows transition to **Stage 4 – Delivered to Customer**.*

5. *Stage 4: Delivered to Customer*



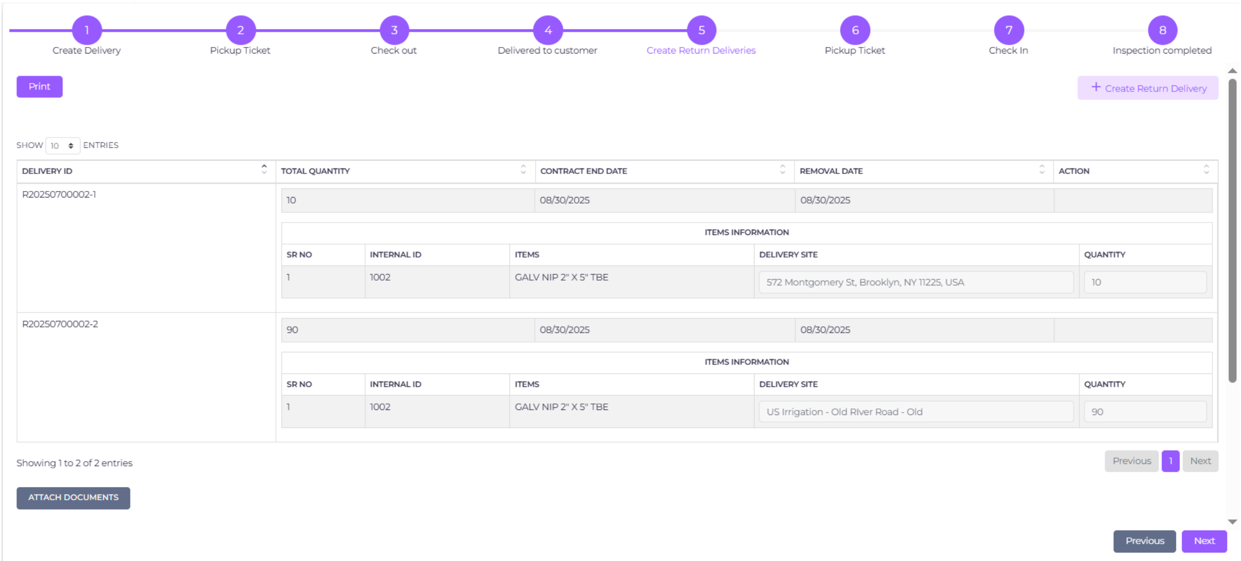
This stage confirms that the equipment or materials have physically arrived at the customer site. It marks the official handover point in the rental lifecycle.

Key Functionalities

- ***Delivery Date*** (Required)
  Users must confirm the ***Delivery Date****, which may differ from the originally scheduled date. This reflects operational flexibility and real-time loading status.*
- ***Status Selection***
  Each delivery line includes a ***Status*** dropdown (e.g., *Loaded*, *None*, etc.) *to reflect current state.*
  - ***Global Status Dropdown*** *allows users to update all delivery lines at once.*
  - *Alternatively, users* ***can*** *manually update status per line item.*

This step ensures that the rental contract has moved into active usage on the customer side.

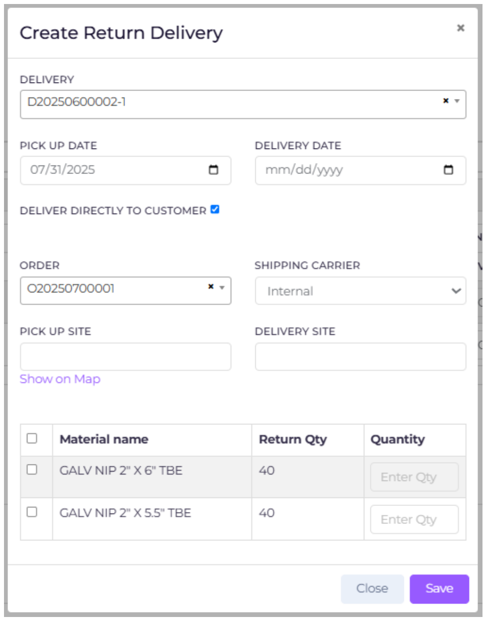
6. Stage 5: Create Return Deliveries



*In this stage, return deliveries are initiated once the original delivery has reached the **"Delivered to Customer"** status. The system automatically generates return delivery records that mirror the original delivery — including items, quantities, and delivery IDs — but with **pickup and delivery sites logically reversed**. Automatically created order can be deleted.*

The user can configure:

- ***Delivery***
- ***Pickup Date***
- ***Delivery Date***
- ***Quantity per item***
- ***Delivery Site / Pickup Site***
- ***Shipping Carrier** (Internal/External)*
- *Optional: **Deliver directly to customer** flag*



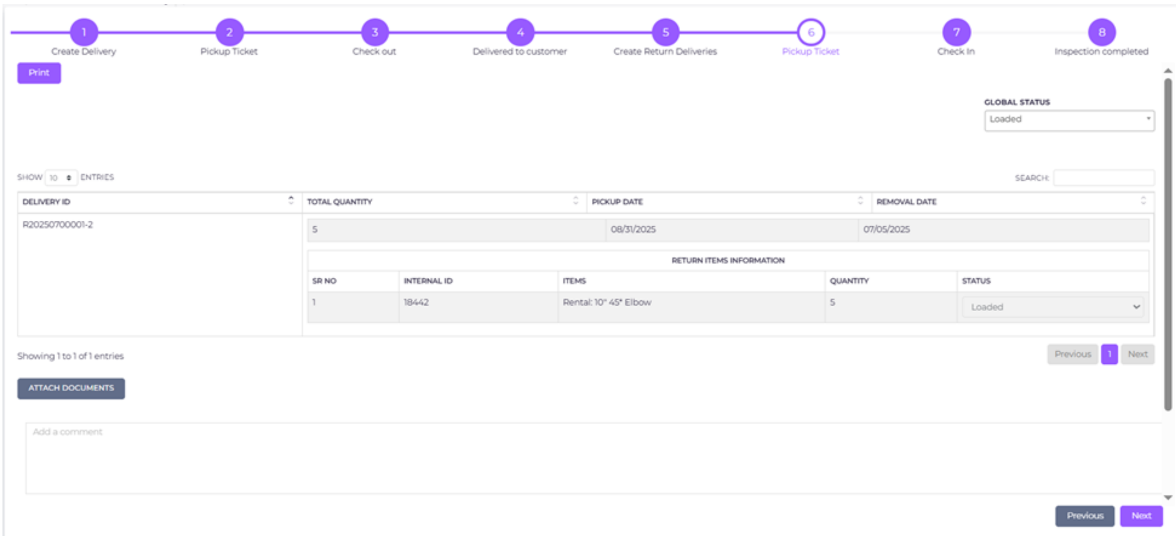
Return delivery can be handled in two ways:

1. ***Standard Return to Internal Site***
   The default flow — materials are picked up from the customer and returned to the original internal location.
2. ***Deliver Directly to Another Customer***
   If this option is selected:
   - *User must* ***select a reference Order*** *that the return delivery will be linked to.*
   - *The system* ***synchronizes both records****: changes to delivery status (e.g. Pickup, Check-In) in either order will reflect in the other.*
   - *Quantity and item-level tracking remain consistent across both records.*

Validation Rules:

- *Delivery selection is required.*
- *Quantity entered must not exceed the available return quantity.*
- *If "Deliver directly to customer" is selected,* ***Order linking is mandatory****.*

7. Stage 6: Pickup Ticket



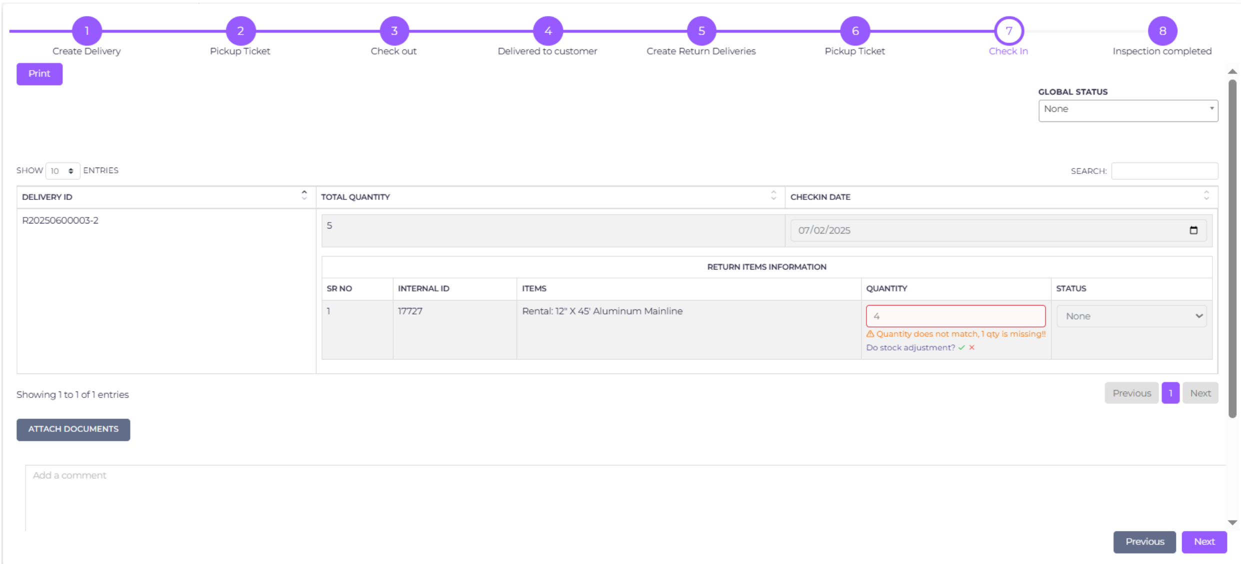
*The **Pickup Ticket** stage is used to confirm that returned materials have been successfully picked up from the customer. It reflects the physical handover of items back into our control.*

Key Functionalities

- *Pickup Date (Required)*
  *Users must confirm the **Pickup Date**, which may differ from the originally scheduled date. This reflects operational flexibility and real-time loading status.*
- *Status Selection*
  *Each delivery line includes a **Status*** dropdown (e.g., *Loaded*, *None*, etc.) *to reflect current state.*
  - ***Global Status Dropdown** allows users to update all delivery lines at once.*
  - *Alternatively, users **can** manually update status per line item.*

*All values from **Return Delivery** creation are carried over. Updates made here trigger downstream actions such as Check-In and Inspection stages.*

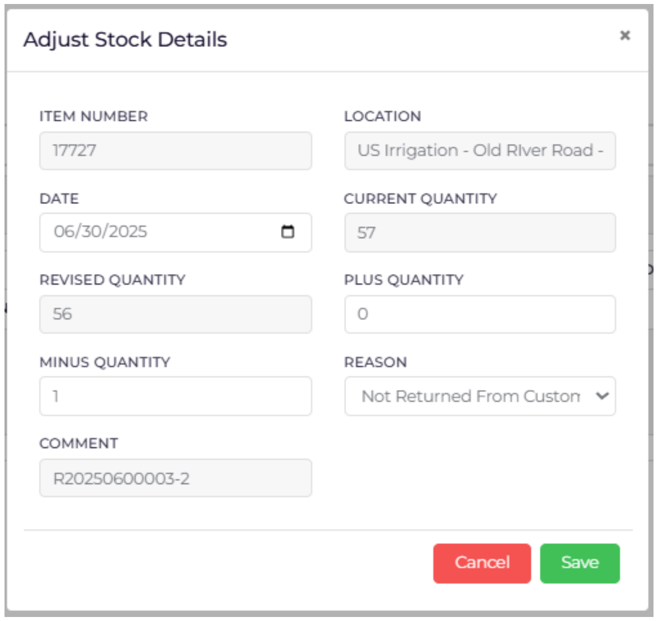
8. *Stage 7: Check In*



*The **Check In** stage is used to confirm that returned rental materials have been received at the warehouse. It reflects the physical return of goods from the customer and triggers validation of quantity and condition.*

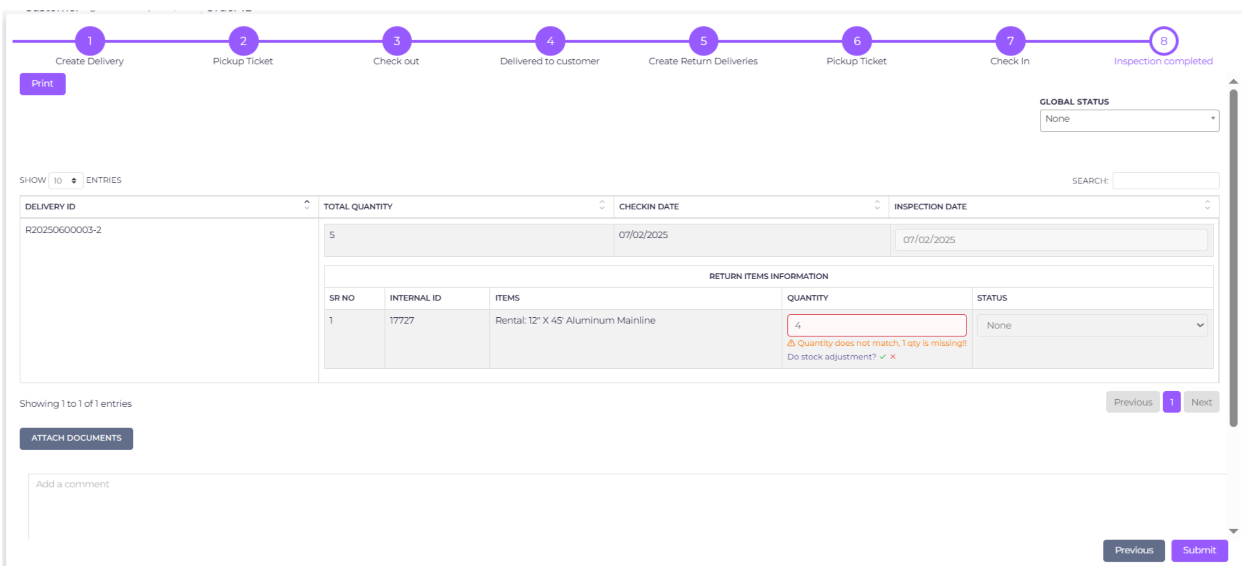
Key Functionalities

- *Check In Date (Required)*
  Users must confirm the Check In Date to record when the items physically returned to the warehouse.
- *Status Selection*
  *Each delivery line includes a **Status dropdown** to reflect current condition or issue.*
  - ***Global Status Dropdown** allows users to bulk update all lines.*
  - *Line-level manual updates are supported for granular control.*
- *Quantity Confirmation & Validation*
  Users enter the quantity returned. The system automatically checks for mismatches between expected and actual quantity.
  - *If quantities do not match, a **mismatch warning** appears (e.g., "1 qty is missing!!").*
  - *A stock adjustment option is triggered to log the discrepancy and update inventory records.*
- *Stock Adjustment Modal*
  *If quantity is less than expected, the system displays a prefilled **Adjust Stock Details** popup with:*
  - *Item, location, current and revised quantity*
  - *Auto-calculated plus/minus quantity*
  - *Reason dropdown (e.g., "Not Returned From Customer")*
  - *Comment field (auto-filled with delivery ID)*



All values from the Return Delivery are prefilled automatically. Updates made here directly affect the warehouse stock ledger and prepare the system for final inspection.

9. Stage 8: Inspection Completed



The Inspection Completed stage is the final confirmation step in the return workflow. It is used to verify that all returned items are received, assessed, and finalized in the system before closing the rental delivery loop.

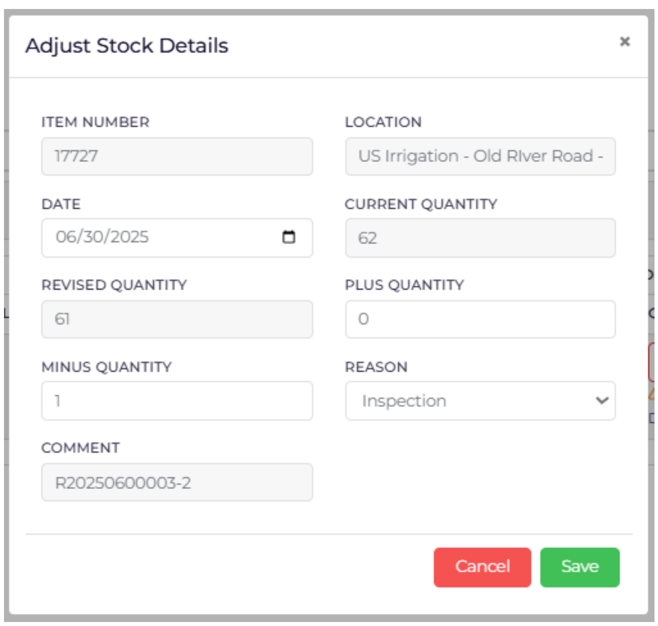
Key Functionalities

- ***Inspection Date (Required)***
  Users must confirm the Inspection Date to indicate when the returned items were officially inspected.
- ***Final Quantity Validation***
  Quantities are reviewed once again. If discrepancies persist from the Check In stage (e.g., missing or damaged units), the system prompts users for stock adjustment.
- ***Status Selection***
  *Each delivery line includes a **Status dropdown** (e.g., Inspected, Rejected, etc.) to finalize the item's return evaluation.*

  - ***Global Status Dropdown** enables bulk status updates.*
  - *Manual per-line status selection is available if needed.*

- ***Stock Adjustment Reminder***
  If quantity mismatch was not resolved during Check In, the system continues to flag it. Users can confirm whether to perform the adjustment.

  - *Item, location, current and revised quantity*
  - *Auto-calculated plus/minus quantity*
  - *Reason dropdown (e.g., "Inspection")*
  - *Comment field (auto-filled with delivery ID)*



All entries from previous stages are carried over automatically. Once this stage is submitted, the return delivery is considered closed, and inventory status is updated accordingly.

Stock Adjustment

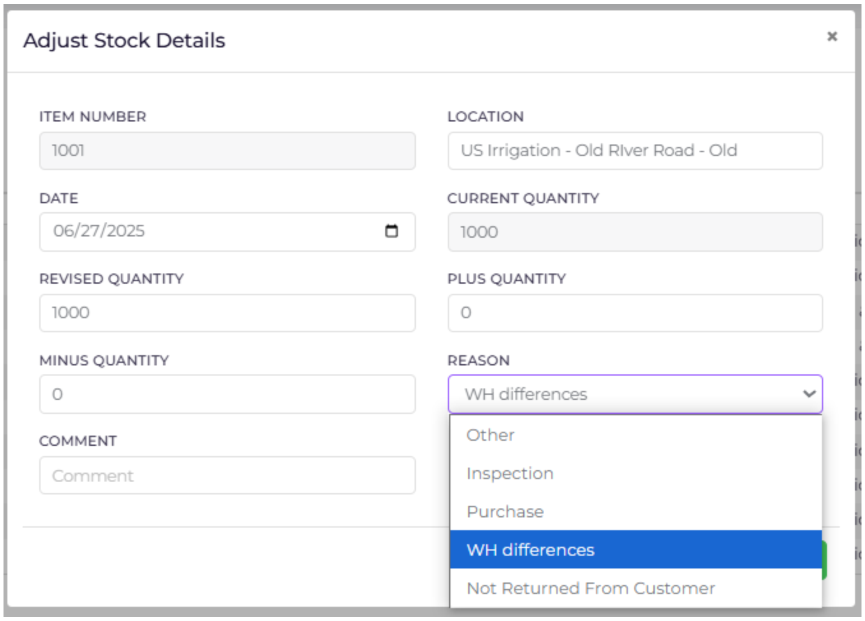
Purpose: *The **Stock Adjustment** module allows users to manually or in bulk update the stock quantities of equipment and materials stored in warehouses. It ensures inventory records reflect actual availability after physical inspections, corrections, or other business events.*

Functionalities:

- ***Search Filters***
  At the top of the screen, users can filter stock records by:
  - ***Equipment ID***
  - ***Equipment Material Group***
  - ***Equipment Name***
  - ***Location***
- ***Data Table***
  The main table displays:
  - ***Equipment ID** – Unique identifier for each stock item.*
  - ***Equipment Material Group** – Category code.*
  - ***Equipment Name** – Full product name.*
  - ***Quantity** – Current recorded quantity.*
  - ***Location** – Warehouse where the stock is stored.*
  - ***Date** – Last updated date.*
  - ***Action** – Pencil icon to trigger manual adjustment modal.*
- ***CSV Export**: The "Stock Adjustment Report CSV" button allows downloading the full adjustment.*
- ***Mass Stock Adjustment**: Clicking this button opens a **batch update modal**, allowing changes to multiple stock items in a table format.*

Adjustment Options:

Manual Adjustment (Edit icon):

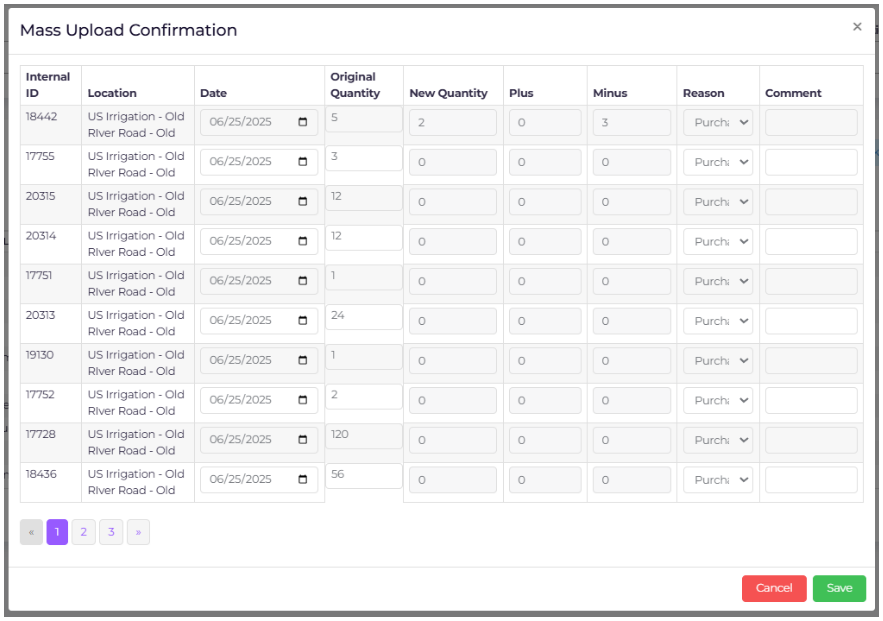


1. *Opens the "Adjust Stock Details" popup.*
2. *Fields include:*
   - *Item Number*
   - *Location*
   - *Date*
   - *Current Quantity*
   - *Revised Quantity*
   - *Plus/Minus Quantity (auto-calculated if revised quantity differs)*
   - *Reason (dropdown: Purchase, WH differences, Inspection, Not Returned From Customer, Other)*
   - *Comment*

For importing, please use following template:

Stock Adjusments - Template.xlsx

Mass Upload (via modal):



Mass Upload Confirmation

Internal ID	Location	Date	Original Quantity	New Quantity	Plus	Minus	Reason	Comment
18442	US Irrigation - Old RIver Road - Old	06/25/2025	5	2	0	3	Purch	
17755	US Irrigation - Old RIver Road - Old	06/25/2025	3	0	0	0	Purch	
20315	US Irrigation - Old RIver Road - Old	06/25/2025	12	0	0	0	Purch	
20314	US Irrigation - Old RIver Road - Old	06/25/2025	12	0	0	0	Purch	
17751	US Irrigation - Old RIver Road - Old	06/25/2025	1	0	0	0	Purch	
20313	US Irrigation - Old RIver Road - Old	06/25/2025	24	0	0	0	Purch	
19130	US Irrigation - Old RIver Road - Old	06/25/2025	1	0	0	0	Purch	
17752	US Irrigation - Old RIver Road - Old	06/25/2025	2	0	0	0	Purch	
17728	US Irrigation - Old RIver Road - Old	06/25/2025	120	0	0	0	Purch	
18436	US Irrigation - Old RIver Road - Old	06/25/2025	56	0	0	0	Purch	

« 1 2 3 »

Cancel Save

3. *Update multiple stock lines in bulk.*
4. *Editable fields:*
   - *New Quantity*
   - *Plus/Minus*
   - *Reason*
   - *Comment*
5. *Use pagination to review all affected entries.*
6. *Save button applies all updates in one step.*

Buttons and Actions:

- ***Search Bar:*** *Filters table in real-time by keyword.*
- ***CSV Export:*** *Downloads stock adjustment log.*
- ***Mass Stock Adjustment:*** *Opens multi-line update modal.*
- ***Edit (Pencil Icon):*** *Opens individual adjustment form for selected item.*

Additional Notes: *All adjustments are logged with a* ***timestamp*** *and* ***reason code****, ensuring full traceability. This feature is typically used by warehouse managers or admins during cycle counts, purchase updates, or returns reconciliation.*