

Salesforce AppExchange App: Native Rent

USER GUIDE

Table of Contents

Introduction.....	2
Overview of the App.....	2
Target Audience.....	2
Native Rent Customizability.....	2
Navigating the App.....	7
How to Launch the Native Rent App.....	7
Overview of the Native Rent Interface.....	7
Scheduler Overview.....	8
Configuring the Scheduler.....	8
Using the Scheduler.....	11
Search Overview.....	18
Managing Rentals for a customer.....	23
Managing Rental Transactions from Contact Page.....	23
Reporting and Analytics.....	27
Pre-built Reports.....	27
How to Access Pre-built Reports.....	27
List of Pre-built Reports.....	27
Customizing Reports.....	28
Integration with Other Apps.....	28
Contacting Support.....	29

Introduction

Overview of the App

Native Rent is a comprehensive, all-in-one rental management platform designed to streamline property management, rental bookings, asset tracking, equipment leasing, vehicle rentals, and fleet operations.

Key features include:

- **Real-time inventory tracking** for efficient asset management
- **Dynamic pricing models** to optimize revenue
- **Mobile check-in/check-out** with GPS integration for seamless operations
- **Advanced fleet management** to enhance vehicle tracking and utilization

By integrating seamlessly with existing systems, Native Rent enhances operational efficiency, improves scheduling accuracy, and optimizes overall rental processes.

Target Audience

Native Rent is designed for:

- Property managers
- Car rental companies
- Equipment leasing businesses
- Fleet operators
- Other rental-based enterprises seeking a scalable and efficient solution.

Native Rent Customizability

Native Rent offers high flexibility and extensive customization capabilities, enabling businesses to tailor the platform to their unique rental workflows, asset types, and customer needs. Whether managing equipment rentals, apartment leases, vehicle hire, or event rentals, the platform ensures a seamless and adaptable experience.

1. Customizable Rental Asset Configuration

Businesses can define rental assets according to their requirements, including attributes such as rental duration, condition tracking, maintenance status, and associated accessories.

Why It Matters:

- Different industries have unique needs (e.g., construction equipment vs. luxury apartment rentals).
- Allows businesses to customize fields add/remove fields to accommodate attribute information for each asset type.

Use Cases:

- Equipment Rentals: Define configurations for heavy machinery, including fuel level, capacity, and operational parameters.

- Apartment Rentals: Customize property listings with details like lease terms, furnished/unfurnished status, and utility inclusions.
- Car Rentals: Configure vehicles based on make, model, mileage caps, and insurance requirements.

2. Customizable Scheduler Interface

Businesses can modify the rental scheduling interface to fit their operational needs, offering drag-and-drop scheduling, color-coded availability, and much more.

Why It Matters:

- Allows for real-time availability tracking and conflict prevention.
- Customizable scheduling views (daily, weekly, monthly) for better resource planning.
- Supports reservations directly from Scheduler View.

Use Cases:

- Event Rentals: A party rental business can configure a scheduler to track the availability of tents, chairs, and sound systems for different dates.
- Construction Equipment Rentals: A heavy equipment rental company can use the scheduler to track backhoes, cranes, and forklifts across multiple job sites.
- Co-Working Space Rentals: Schedule meeting rooms, shared desks, and event spaces with real-time availability.

3. Customizable Rental Search Interface

Businesses can personalize the search experience based on customer preferences, rental duration, and asset categories, ensuring users find what they need quickly.

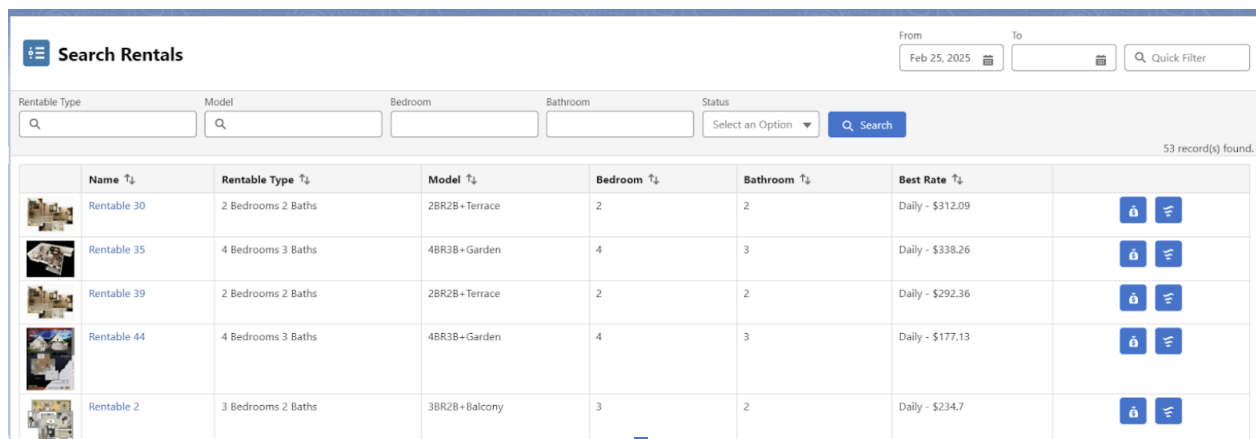
Why It Matters:

- Custom filters based on location, price range, availability, and features.
- Integration with inventory tracking to prevent double bookings.

Use Cases:

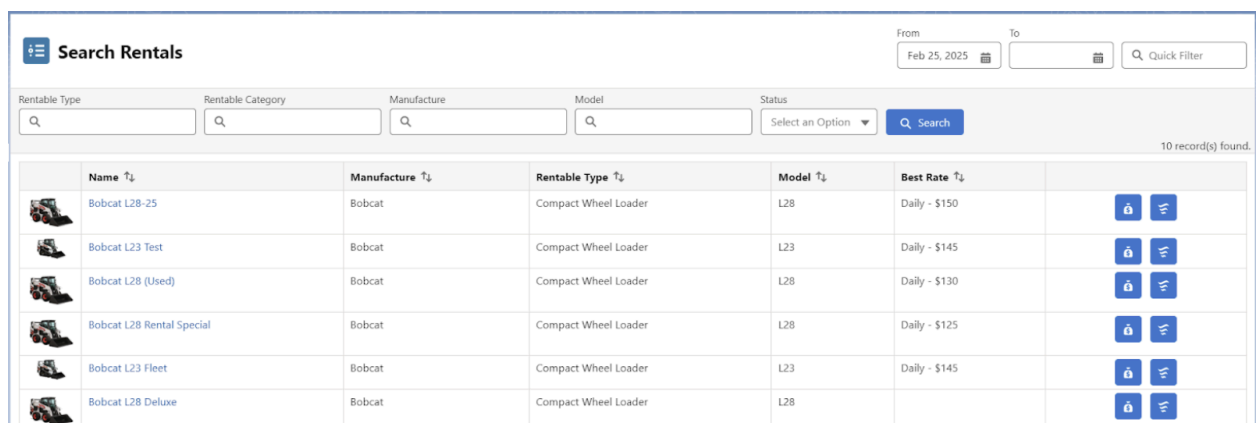
- **Luxury Car Rentals:** Customers can search by car type (SUV, sports car, sedan), brand, and rental period.
- **Vacation Rentals:** Enable filtering by city, price range, amenities (WiFi, pool, pet-friendly), and proximity to landmarks.
- **Camera & Equipment Rentals:** Let photographers search by brand, lens compatibility, and rental duration.

Refer to the examples below to get an idea of the customizability of the application:



	Name ↑↓	Rentable Type ↑↓	Model ↑↓	Bedroom ↑↓	Bathroom ↑↓	Best Rate ↑↓	
	Rentable 30	2 Bedrooms 2 Baths	2BR2B+Terrace	2	2	Daily - \$312.09	
	Rentable 35	4 Bedrooms 3 Baths	4BR3B+Garden	4	3	Daily - \$338.26	
	Rentable 39	2 Bedrooms 2 Baths	2BR2B+Terrace	2	2	Daily - \$292.36	
	Rentable 44	4 Bedrooms 3 Baths	4BR3B+Garden	4	3	Daily - \$177.13	
	Rentable 2	3 Bedrooms 2 Baths	3BR2B+Balcony	3	2	Daily - \$234.7	

The above screenshot depicts a search page for Property Rentals, while the below screenshot shows equipment rentals:



	Name ↑↓	Manufacture ↑↓	Rentable Type ↑↓	Model ↑↓	Best Rate ↑↓	
	Bobcat L28-25	Bobcat	Compact Wheel Loader	L28	Daily - \$150	
	Bobcat L23 Test	Bobcat	Compact Wheel Loader	L23	Daily - \$145	
	Bobcat L28 (Used)	Bobcat	Compact Wheel Loader	L28	Daily - \$130	
	Bobcat L28 Rental Special	Bobcat	Compact Wheel Loader	L28	Daily - \$125	
	Bobcat L23 Fleet	Bobcat	Compact Wheel Loader	L23	Daily - \$145	
	Bobcat L28 Deluxe	Bobcat	Compact Wheel Loader	L28		

4. Support for Multiple Rental Rates, Fees, and Add-On Services

Businesses can configure flexible pricing models, including:

- Hourly, daily, weekly, or monthly rental rates.

- Optional add-ons like insurance, GPS tracking, cleaning services, or maintenance packages.
- Dynamic pricing adjustments based on demand, seasonality, or customer loyalty.

Why It Matters:

- Enables diverse monetization models for different industries.
- Customers get greater transparency in pricing.
- Automates fee calculations, reducing manual errors.

Use Cases:

- Bike Rentals: Offer hourly rates for tourists and monthly memberships for commuters.
- Hotel & Vacation Homes: Charge extra for late check-outs, cleaning fees, and concierge services.
- Medical Equipment Rentals: Allow hospitals to rent ventilators with optional maintenance and training add-ons.

5. Configurable Workflows to Meet Diverse Operational Needs

Businesses can customize workflows to match their internal processes, from reservation to check-out, billing, and return tracking.

Why It Matters:

- Ensures operational efficiency by automating approvals, notifications, and payment reconciliation.
- Reduces manual intervention with pre-set triggers for overdue returns, maintenance alerts, and contract renewals.
- Can integrate with CRM, ERP, and accounting systems for a seamless experience.

Use Cases:

- Corporate Laptop Rentals: IT teams can set up workflows to approve rental requests, track usage, and enforce return deadlines.

- Furniture Rentals: Automate renewal reminders for customers renting sofas, dining sets, or office desks.
- Luxury Watch & Handbag Rentals: Enable high-end brands to implement authentication checks and security deposits.

Customizability is a Game-Changer for Rental Businesses

Native Rent's ability to adapt to different industries, workflows, and pricing structures makes it an ideal choice for businesses looking for a scalable rental management solution. Whether you're renting construction equipment, apartments, vehicles, or consumer electronics, the platform ensures:

Seamless customization of assets, pricing, and workflows.

Enhanced customer experience with tailored search and scheduling.

Operational efficiency with automated rental lifecycle management.

With Native Rent, businesses can optimize their rental operations, increase revenue, and improve customer satisfaction.

Navigating the App

Navigating the **Native Rent** app in Salesforce is simple and intuitive. Below are the steps to launch the app and an overview of its main components:

How to Launch the Native Rent App

1. **Log in to Salesforce:**
 - Open your Salesforce org and log in with your credentials.
2. **Open the App Launcher:**
 - Click on the **App Launcher** (grid icon) in the top-left corner of the Salesforce interface.
3. **Search for Native Rent:**
 - In the search bar, type "**Native Rent**".

- Click on the **Native Rent** app from the search results.
4. **Launch the App:**
- The Native Rent app will open, displaying the default landing page i.e. Search Records

Overview of the Native Rent Interface

A. App Navigation

Tabbed navigation is available to access the various objects and pages in Native Rent app as follows:

- **Search Records:** A search page expressly provided to search and locate the Rentals quickly.
- **Scheduler:** Provides an at-a-glance overview of the Rentable Schedule for all rentals and Rentables, which is fully customizable.
- **Rentables:** Manage rentable items (e.g., equipment, vehicles, properties).
- **Rentable Locations:** Manage locations for rentable check-in/out.
- **Reports:** Access pre-built and custom reports.
- **Rentable Types:** Define the types of Rentable assets, such as cars, homes, equipment, etc., under a rental category. (e.g., Laptop as a Rentable Type under the Rentable category of electronics)
- **Rentable Transactions:** View and manage rental transactions.
- **Rentable Transactions Details:** View and manage details about each rental transaction.
- **Rental Rates:** View and manage rental Rates.
- **Manufactures:** Manufacturer information for the Rentable Assets such as equipment or Cars models.
- **Models:** Model information for Rentable Assets such as equipment or Car models.
- **Contacts:** Standard Salesforce Contacts Object
- **Dashboard:** Overview of key metrics and reports.

B. List Views

- List views allow you to filter and sort records based on specific criteria (e.g., available rentables, rented rentables, etc.).
- Customize list views to display the most relevant information.

C. Global Search

- Use the global search bar at the top of the page to quickly find records (e.g., Rentables, Contacts, Rental Transactions).

Following these steps, you can easily navigate the Native Rent app and access its powerful features for managing rentals, assets, and customers.

Scheduler Overview

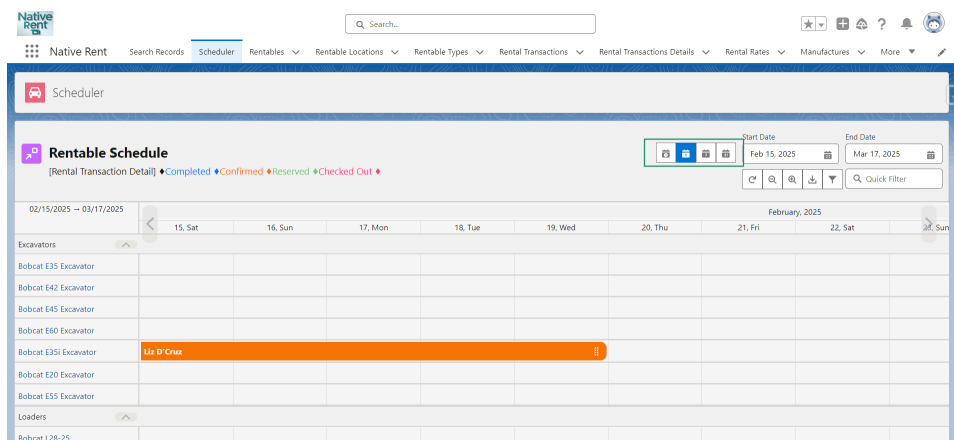
The **Native Rent** scheduler is a powerful tool for managing rental bookings, reservations, and asset availability.

Configuring the Scheduler

Below is a detailed guide to help you configure the scheduler to meet your specific business needs:

e. Change the Scheduler's View

- **Switch Views:** Use the view selector to switch between daily, weekly, monthly, or agenda views.

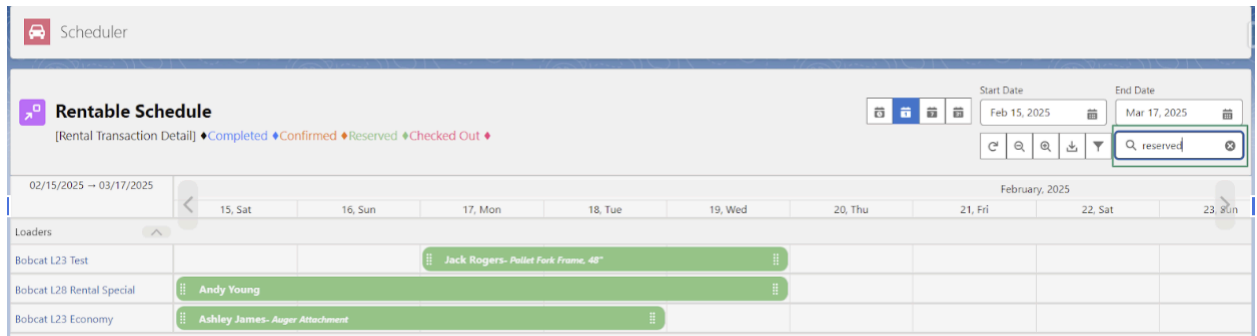


- **Zoom In/Out:** Adjust the time scale for better visibility of bookings. Click on the zoom in or zoom-out buttons as needed.
- **Refresh:** Click the Refresh button to Refresh the current view to reflect any changes to the records and view up-to-date information in the scheduler view.

e. Quick Filters

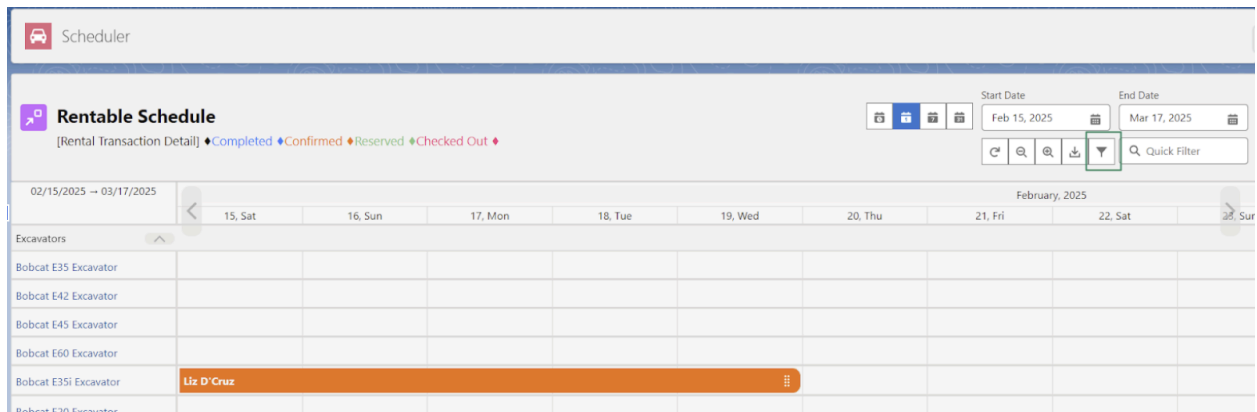
- Quickly filter by typing contact name, reservation status, Rentable name, etc. to filter the records displayed in the scheduler.

For example, only Transactions with reserved status are shown when typing “reserved” in the quick filter box.



Add Custom Filters in the Scheduler

1. Click on the **Global Filter** icon in the scheduler as shown below:



2. Add custom filter logic by:
 - Selecting the **Subject** (e.g., Rentable, Transactions).
 - Choosing the **fields** (e.g., Status, Rentable Type).
 - Applying **logic operators** (e.g., equals, contains, OR, AND).
3. Click the **“Apply”** button to apply the filter logic.

Filter Records

SObject

Fields

Operator

Value

Logic

	☐ SObject	☐ Field	Operator	Value	Logic
1	☐ nativerent_Rental_Transact...	☐ nativerent_Rentable__c	=	true	OR

Example:

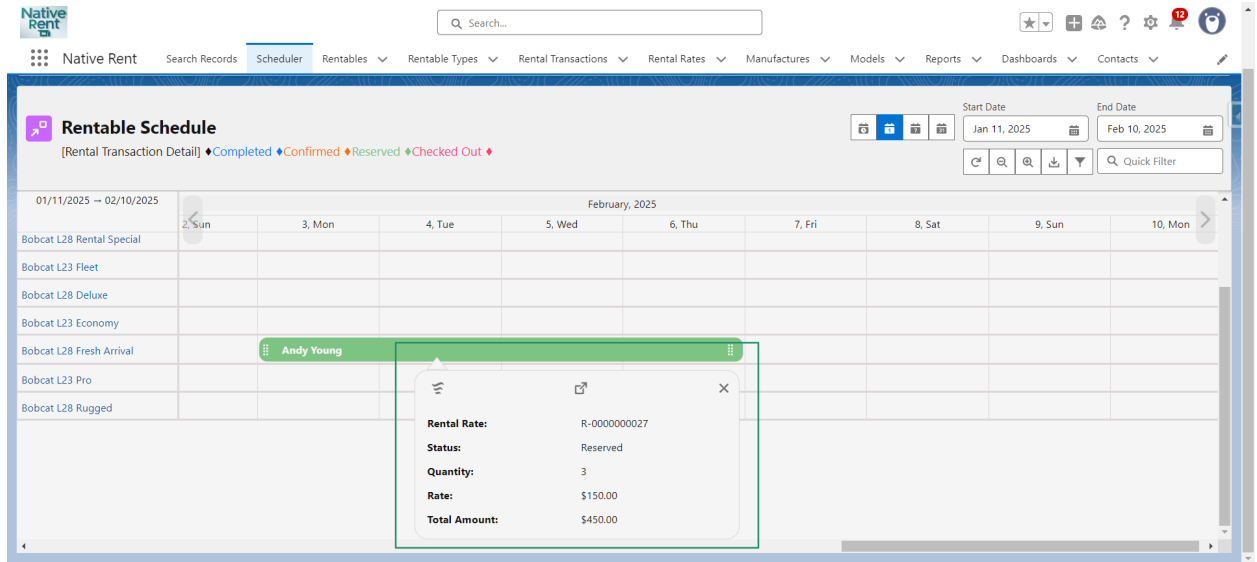
- Filter by **Rentable Type = Laptop** and **Status = Confirmed**.
- This will display only confirmed bookings for Laptops.

By following these steps, you can configure the Native Rent scheduler to match your rental management processes and improve operational efficiency.

Using the Scheduler

1. View Reservation Status and Details from the Scheduler

1. Locate the rental transaction detail record on the scheduler.
2. Click on the record.
3. Related information such as Rental Rate, Status, Quantity, Rate, and Total amount is shown.



4. This popup can be customized via scheduler customization. Refer to the scheduler customization section for further instructions.

2. Drag-and-Drop Functionality in the Native Rent Scheduler

The **drag-and-drop** feature in the Native Rent scheduler allows you to quickly reschedule rental transactions by moving them to new dates or associating them with different rentable items. This feature is designed to simplify managing reservations and ensure optimal utilization of your rentable assets.

How Drag-and-Drop Works

1. Locate the Rental Transaction:

- Find the rental transaction record on the scheduler you want to reschedule or reassign.

2. Drag the Transaction:

- Click and hold the rental transaction record.
- Drag it to a new date or a different rentable item on the scheduler.

3. Drop the Transaction:

- Release the mouse button to drop the transaction in the new location.

What Happens When You Drag-and-Drop

● Change of Dates:

- If you drag the transaction to a new date, the **start and end dates** of the reservation will be updated automatically.

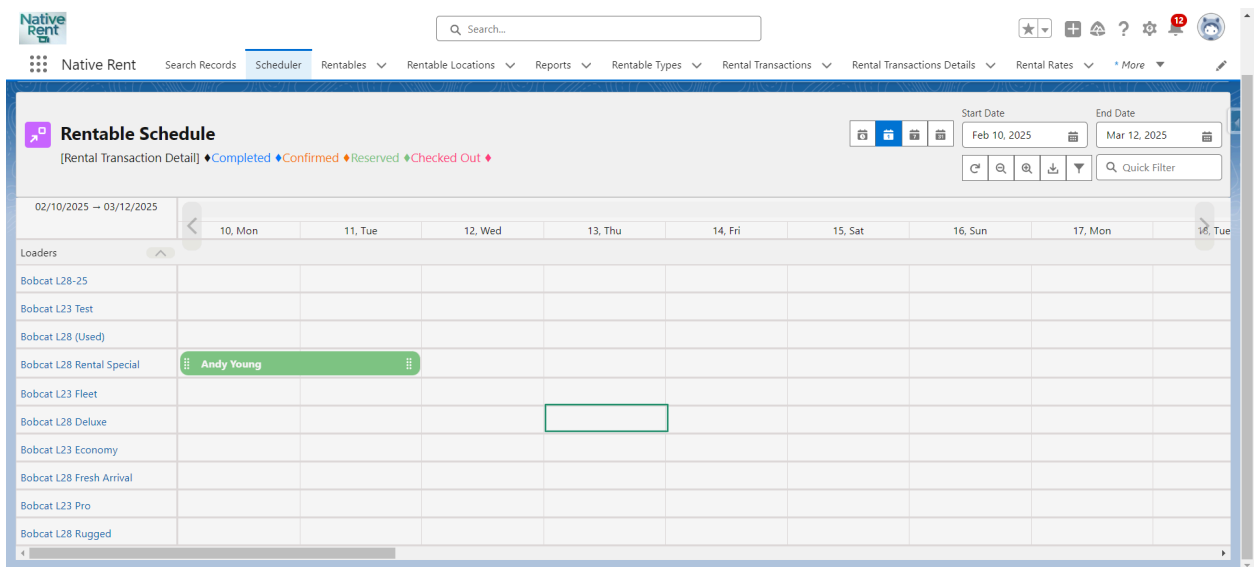
- The scheduler will check for availability and prevent conflicts (if configured).
- **Change of Rentable:**
 - If you drag the transaction to a different rentable item, the **rentable associated with the reservation** will be updated.
 - The scheduler will ensure the new rentable is available for the selected dates.
- **Automatic Updates:**
 - All related fields (e.g., rental rates, fees) will be recalculated based on the new dates or rentable.

3. Create new Reservations directly from the Scheduler

The **Scheduler** in the Native Rent app allows you to create new reservations directly by clicking on an empty slot. This feature simplifies booking rentable items (e.g., equipment, vehicles, rental properties) for your customers. Below is a step-by-step guide to creating reservations from the scheduler:

1. Click on an Empty Slot in the Scheduler

1. Open the **Scheduler** in the Native Rent app.
2. Locate an empty slot (available period) for the rentable item you want to reserve.
3. Click on the empty time slot against a rentable item to create a new reservation.



2. Select or Create a Contact

1. Select an Existing Contact:

- Search for and select the contact (customer) for the reservation.

2. Create a New Contact:

- If the contact does not exist, click **New Contact** to create a new record.

3. Click the **Next** button to proceed.

This screenshot shows a form titled 'Create a New Contact'. At the top, it displays 'Rentable Item Name : Bobcat L28 Deluxe' and 'Manufacture : Bobcat Model : L28', with a description 'Deluxe version with additional features'. Below this is a 'Select Lookup' section with a search bar containing 'Type to search...'. A dropdown menu is open, showing 'New Contact' with a checkmark. Underneath, there are four input fields: 'First Name', 'Last Name', 'Phone #', and 'Email'. The 'Email' field is pre-filled with 'you@example.com'. A blue 'Next' button is located at the bottom right of the form.

This screenshot shows the same 'Create a New Contact' form, but the 'Select Lookup' search bar now contains 'Rose Gonzalez'. The dropdown menu is no longer open. The 'Next' button remains at the bottom right.

3. Select From and To Dates

1. **From Date:** Select the start date and time for the reservation.
2. **To Date:** Select the end date and time for the reservation.
3. Click the **Next** button to proceed.

This screenshot shows a form for selecting dates. It includes the contact name 'Rose Gonzalez' and the item details 'Bobcat L28 Deluxe'. There are two date selection fields: 'From Date' (set to 'Feb 13, 2025') and '* To Date' (set to 'Feb 14, 2025'). Below these fields, it says 'Number of Days :1'. At the bottom right, there are two buttons: 'Previous' and 'Next'.

4. Review Charges and Create Reservation

1. Check Charges:

- Review the charges for the reservation (e.g., rental rate, fees, taxes).

2. Set Status as Confirmed (Optional):

- Check the **“Set status as Confirmed”** checkbox if the booking is confirmed.

3. Create Reservation:

- Click the **“Create Reservation”** button to finalize the reservation.

edule

Start Date Feb 10, 2025

Contact Name : **Rose Gonzalez**
Rentable Item Name : **Bobcat L28 Deluxe** Manufacture : **Bobcat** Model : **L28**
Description : **Deluxe version with additional features**

All Charges
1 of 1 item

Rental Transaction Name	Rate	Quantity	Discount	Total Amount
Bobcat L28 Deluxe	\$160.00	1		\$160.00

☐ Set Status as Confirmed **Total = \$160.00**

[Previous](#) [Create Reservation](#)

The confirmed Transaction can be seen on the Scheduler as shown below:

Native Rent Search Records Scheduler Rentables Rentable Types Rental Transactions Rental Rates Manufactures Models Reports Dashboards Contacts

Rentable Schedule
[Rental Transaction Detail] Completed Confirmed Reserved Checked Out

Start Date Feb 10, 2025 End Date Mar 12, 2025

02/10/2025 – 03/12/2025

	10, Mon	11, Tue	12, Wed	13, Thu	14, Fri	15, Sat	16, Sun	17, Mon
Bobcat L23 Test								
Bobcat L28 (Used)								
Bobcat L28 Rental Special	Andy Young							
Bobcat L23 Fleet								
Bobcat L28 Deluxe								
Bobcat L23 Economy								
Bobcat L28 Fresh Arrival								
Bobcat L23 Pro								
Bobcat L28 Rugged								

Rose Gonzalez

Rental Rate: R-000000019
Status: Confirmed
Quantity: 1
Rate: \$160.00
Total Amount: \$160.00

4. Check-In/Check-Out from the Scheduler

1. Locate the rental transaction detail record on the scheduler.

- Click on the **flow icon** that appears when you select the record.

Rentable Schedule
[Rental Transaction Detail] ♦Completed ♦Confirmed ♦Reserved ♦Checked Out ♦

02/25/2025 → 03/27/2025

16, Sun 17, Mon 18, Tue 19, Wed 20, Thu

Excavators
Loaders

Bobcat L28-25				
Bobcat L23 Test				
Bobcat L28 (Used)				
Bobcat L28 Rental Special	Andy Young			
Bobcat L23 Fleet				
Bobcat L28 Deluxe				
Bobcat L23 Economy	Ashley James- Auger Attachment			
Bobcat L28 Fresh Arrival				

Jack Rogers- Pallet Fork Frame, 48"

Rental Rate: R-0000000057
Status: Reserved
Quantity: 2
Rate: \$145.00
Total Amount: \$290.00

- A pop-up window will display the rental transaction details.

Name: Jack Rogers
Email : jrogers@burlington.com
Phone :
Start : 2/17/2025, 4:00 PM End Date : 2/19/2025, 4:00 PM Status: Reserved Total : 950

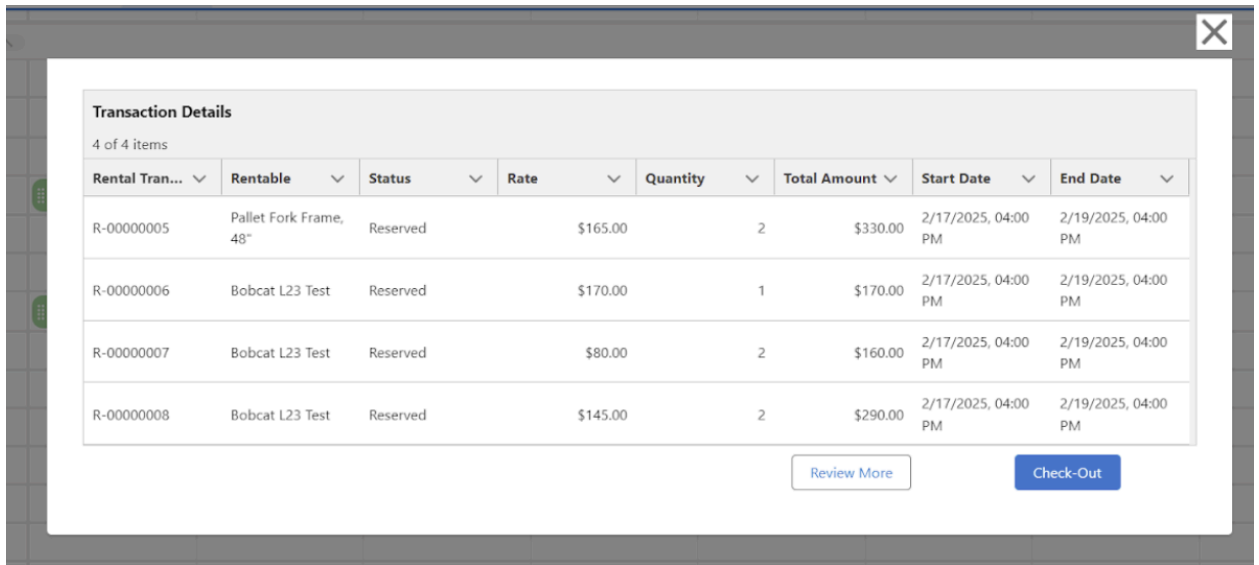
Review Details Check-out/In

- To review charge details, click the **"Review Details"** button.

Name: Jack Rogers
Email : jrogers@burlington.com
Phone :
Start : 2/17/2025, 4:00 PM End Date : 2/19/2025, 4:00 PM Status: Reserved Total : 950

Review Details Check-out/In

- The transaction details for the selected customer and rental transaction will be displayed.



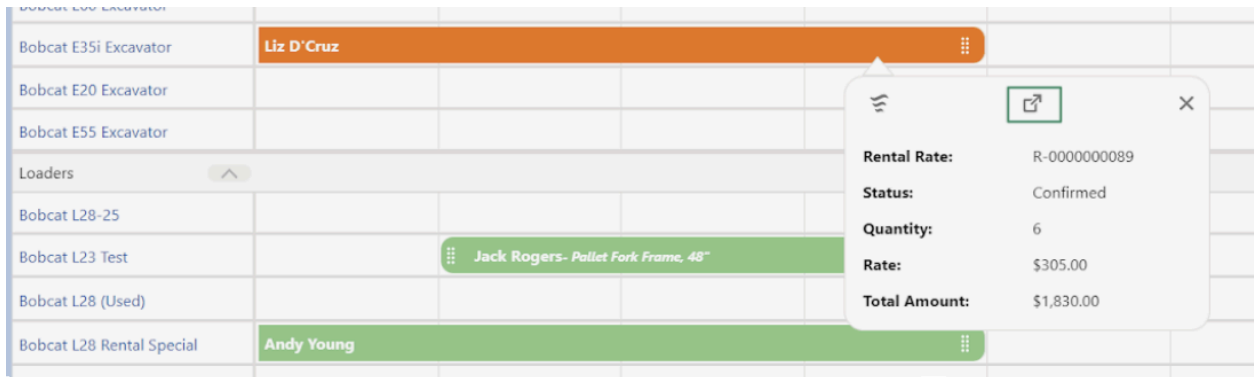
Rental Tran...	Rentable	Status	Rate	Quantity	Total Amount	Start Date	End Date
R-00000005	Pallet Fork Frame, 48"	Reserved	\$165.00	2	\$330.00	2/17/2025, 04:00 PM	2/19/2025, 04:00 PM
R-00000006	Bobcat L23 Test	Reserved	\$170.00	1	\$170.00	2/17/2025, 04:00 PM	2/19/2025, 04:00 PM
R-00000007	Bobcat L23 Test	Reserved	\$80.00	2	\$160.00	2/17/2025, 04:00 PM	2/19/2025, 04:00 PM
R-00000008	Bobcat L23 Test	Reserved	\$145.00	2	\$290.00	2/17/2025, 04:00 PM	2/19/2025, 04:00 PM

Review More Check-Out

- Perform a **check-out** directly by clicking the **“Check-Out”** button.

5. Open Record details in a new tab

- Locate the rental Transaction on a scheduler and select it.
- Click on the icon as shown below:



Bobcat E35i Excavator	Liz D'Cruz	
Bobcat E20 Excavator		
Bobcat E55 Excavator		
Loaders		
Bobcat L28-25		
Bobcat L23 Test	Jack Rogers- Pallet Fork Frame, 48"	
Bobcat L28 (Used)		
Bobcat L28 Rental Special	Andy Young	

Rental Rate: R-000000089
Status: Confirmed
Quantity: 6
Rate: \$305.00
Total Amount: \$1,830.00

- It opens the Transaction record detail page in the new tab.

Native Rent Search Records Scheduler Rentables Rentable Types Rental Transactions Rental Rates Manufactures R-00000004 | Rental Trans... More

Rental Transaction Detail
R-00000004

Edit Delete Clone

Related	Details
Rental Transaction Name	Rental Transaction
R-00000004	RT-000000003
Status	Charge Name
Confirmed	
Rentable	Transaction Type
A-0000000033	Daily
Total Amount	Start Date
\$1,830.00	2/13/2025, 4:00 PM
Discount	End Date
	2/19/2025, 4:00 PM
Rental Rate	Rentable
R-0000000089	Bobcat E3Si Excavator
Rate	
\$305.00	

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

▼ **Upcoming & Overdue**

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

6. Export Scheduler View

1. Click on the **“Export”** button in the scheduler toolbar.
2. Select the desired export format below (e.g., PNG, PDF, CSV).

Scheduler

Rentable Schedule
[Rental Transaction Detail] • Completed • Confirmed • Reserved • Checked Out •

Start Date: Feb 15, 2025 End Date: Mar 17, 2025

Quick Filter

02/15/2025 → 03/17/2025

15, Sat 16, Sun 17, Mon 18, Tue 19, Wed 20, Thu 21, Fri

Excavators

Bobcat E35 Excavator							
Bobcat E42 Excavator							
Bobcat E45 Excavator							
Bobcat E60 Excavator							
Bobcat E3Si Excavator	Liz D'Cruz						

Export Format: PNG

PDF CSV CSV/FORMATED

3. Click the **“Download”** button to export the view.

Sample PNG Export:

[illegible]

Example of an exported scheduler view in PNG format.

Search Overview

The **Search Records** tab in the Native Rent app provides a powerful and flexible way to search for rental records. It includes **date-based filters**, **quick filters**, and **column search** functionality to help you quickly find the needed records. Below is a detailed guide to using these features:

Native Rent

Search...

Star

Home

Help

Notifications

Profile

Native Rent

Search Records

Scheduler

Rentables

Rentable Locations

Rentable Types

Rental Transactions

Rental Transactions Details

Rental Rates

Manufactures

More

Search Records

Search Rentals

From

To

Quick Filter

Rentable Type

Rentable Category

Manufacture

Model

Status

Q

Q

Q

Q

Select an Option

Search

9 record(s) found.

	Name ↕	Manufacture ↕	Rentable Type ↕	Model ↕	Best Rate ↕	
	Bobcat L23 Test	Bobcat	Compact Wheel Loader	L23	Weekly - \$840	🔒 ⌵
	Bobcat L23 Fleet	Bobcat	Compact Wheel Loader	L23	Daily - \$145	🔒 ⌵
	Bobcat L23 Economy	Bobcat	Compact Wheel Loader	L23		🔒 ⌵
	Bobcat L23 Pro	Bobcat	Compact Wheel Loader	L23		🔒 ⌵
	Bobcat L23 Basic	Bobcat	Compact Wheel Loader	L23		🔒 ⌵

e. Accessing the Search Records Tab

1. Open the **Native Rent** app in Salesforce.
2. Navigate to the **Search Records** tab.

e. Date-Based Filters

Date-based filters allow you to narrow search results to records with transactions within a specific date range.

How to Use Date-Based Filters

1. From Date:

- Enter the start date for your search.

2. To Date:

- Enter the end date for your search.

3. Apply Filters:

- Click **Search** to filter records with transactions within the specified date range.

e. Quick Filters

Quick filters allow you to search for records using keywords matching any of the search results' columns.

How to Use Quick Filters

1. Enter a Keyword:

- Type a keyword (e.g., a rentable name, customer name, or rate) in the quick filter search bar.

The screenshot displays the 'Native Rent' application interface. At the top, there is a navigation bar with tabs: 'Native Rent', 'Search Records', 'Scheduler', 'Rentables', 'Rentable Locations', 'Rentable Types', 'Rental Transactions', 'Rental Transactions Details', 'Rental Rates', 'Manufactures', and 'More'. Below this is a 'Search Rentals' section. It includes a 'From' date field set to 'Feb 15, 2025' and a 'To' date field. A search bar on the right contains the text '150'. Below these are four input fields for 'Rentable Type', 'Rentable Category', 'Manufacture', and 'Model', each with a search icon. A 'Status' dropdown menu is set to 'Select an Option'. A blue 'Search' button is located to the right of these fields. Below the search filters is a table with two rows of results. The first row shows a Bobcat L28-25, a Bobcat, a Compact Wheel Loader, and a model L28, with a best rate of 'Daily - \$150'. The second row shows a Bobcat L28 Fresh Arrival, a Bobcat, a Compact Wheel Loader, and a model L28, with a best rate of 'Daily - \$150'. The table has columns for 'Name', 'Manufacture', 'Rentable Type', 'Model', and 'Best Rate'. There are also icons for locking and deleting records.

Name ↑↓	Manufacture ↑↓	Rentable Type ↑↓	Model ↑↓	Best Rate ↑↓
Bobcat L28-25	Bobcat	Compact Wheel Loader	L28	Daily - \$150
Bobcat L28 Fresh Arrival	Bobcat	Compact Wheel Loader	L28	Daily - \$150

2. View Results:

- The search results will automatically update to only records matching the keyword in any column.

Example:

- Entering 150 in the quick filter will display records where the **Best Rate** is \$150.

Column Search

Column search allows you to filter records based on specific columns in the search results.

How to Use Column Search

1. **Select a Column:**
 - Click the dropdown arrow in the column's header you want to sort.
2. **Enter Filter Criteria:**
 - Enter the value or condition you want to filter by (e.g., Status = Available).
3. **Apply Filter:**
 - The search results will update on clicking the “Search” button to show only records that match the filter criteria.

Action Column in Search Results

The **last column** in the search results on the **Search Records** tab in the Native Rent app is an **Action Column**. This column provides quick access to actions performed on individual records. The two primary actions available are:

1. **View Rates:** This lets you view the rental rates associated with a specific rentable item.
2. **Flow Action:** Triggers a Salesforce flow to perform the rental process.

How to Use the Action Column

View Rates Action

- **Purpose:** Displays the rental rates for a specific rentable item.
- **Steps:**

1. Locate the record you want to view rates for in the search results.
2. Click the **View Rates** action button in the last column. A pop-up will display the rental rates associated with the rentable item.

als

Find Rentable Rates

Rentable Rates

4 of 4 items • 0 items selected

☐	Rental Rate Name	Rate Type	Start Date	End Date	Rate
☐	R-0000000000				\$3,200.00
☐	R-0000000001		Dec 1, 2024	Dec 15, 2024	\$150.00
☐	R-0000000002				\$900.00
☐	R-0000000003		Dec 1, 2024	Dec 15, 2024	

Finish

ed)

Flow Action

- **Purpose:** Triggers a Salesforce flow to perform the rental process.
 1. Locate the record you want to act on in the search results.
 2. Click the **Flow Action** button in the last column.
 3. Follow the prompts in the flow to complete the action.

Customizing the Action Column

- You can customize the actions available in the Action Column. The Rental process is as follows:

On clicking the flow icon, a popup to select contact or create new contact is available.

This screenshot shows a 'New Contact' form within a rental application. At the top, it displays the 'Rentable Item Name' as 'Bobcat L28-25' and the 'Description' as 'Small articulated loader, ideal for tight spaces'. Below this is a 'Select Lookup' section with a search bar. The 'New Contact' section contains four input fields: 'First Name', 'Last Name', 'Phone #', and 'Email'. The 'Email' field is pre-filled with 'you@example.com'. A blue 'Next' button is located at the bottom right of the form.

This screenshot shows the 'New Contact' form with sample data entered. The 'First Name' field contains 'Andy', the 'Last Name' field contains 'Young', the 'Phone #' field contains '(785) 241-6200', and the 'Email' field contains 'a_young@dickenson.com'. A green rectangular box highlights the entire 'New Contact' section. A blue 'Next' button is at the bottom right.

This screenshot shows a confirmation screen titled 'Rental Process'. It asks the user, 'Are you sure you like to create new contact for Andy, Young Email : a_young@dickenson.com ?'. At the bottom right, there are two buttons: 'Previous' and 'Next'.

After that, the reservation From and to dates are to be selected.

Bobcat	Compact Wheel Loader	L28	Daily - \$150
Contact Name : Andy Young Rentable Item Name : Bobcat L28 Fresh Arrival Manufacture : Bobcat Model : L28 Description : Brand new L28, just arrived in our fleet			
From Date Feb 4, 2025		* To Date Feb 7, 2025 Format: Dec 31, 2024	
Number of Days :3			
		Previous Next	

All charges are calculated automatically and the total is presented.

Bobcat	Compact Wheel Loader	L28	Daily - \$150										
Contact Name : Andy Young Rentable Item Name : Bobcat L28 Fresh Arrival Manufacture : Bobcat Model : L28 Description : Brand new L28, just arrived in our fleet													
All Charges 1 of 1 item <table border="1"> <thead> <tr> <th>Rental Transaction Name</th> <th>Rate</th> <th>Quantity</th> <th>Discount</th> <th>Total Amount</th> </tr> </thead> <tbody> <tr> <td>Bobcat L28 Fresh Arrival</td> <td>\$150.00</td> <td>3</td> <td></td> <td>\$450.00</td> </tr> </tbody> </table> ☐ Set Status as Confirmed Total = \$450.00				Rental Transaction Name	Rate	Quantity	Discount	Total Amount	Bobcat L28 Fresh Arrival	\$150.00	3		\$450.00
Rental Transaction Name	Rate	Quantity	Discount	Total Amount									
Bobcat L28 Fresh Arrival	\$150.00	3		\$450.00									
		Previous Create Reservation											

If the reservation is already confirmed, then check the “Confirmed” checkbox, else click on the “Create Reservation” button.

Rental Transaction RT-000000002																											
Details Customer: Andy Young Start Date: 2/3/2025, 4:00 PM End Date: 2/6/2025, 4:00 PM Total: \$450.00 Created By: John Doe , 2/17/2025, 2:51 AM					Status: Reserved Rental Transaction Name: RT-000000002 Owner: John Doe Last Modified By: John Doe , 2/17/2025, 2:51 AM																						
Rental Transactions Details (1) 1 item • Sorted by Rentable • Updated a few seconds ago <table border="1"> <thead> <tr> <th>Rentable</th> <th>Transaction</th> <th>Rate</th> <th>Quantity</th> <th>Total Amount</th> <th>Start Date</th> <th>End Date</th> <th>Status</th> <th>Rental Transaction</th> </tr> </thead> <tbody> <tr> <td>1 Bobcat L28 Fresh Arrival</td> <td>Daily</td> <td>\$150.00</td> <td>3.00</td> <td>\$450.00</td> <td>2/3/2025, 4:00 PM</td> <td>2/6/2025, 4:00 PM</td> <td>Reserved</td> <td>R-000000001</td> </tr> </tbody> </table>										Rentable	Transaction	Rate	Quantity	Total Amount	Start Date	End Date	Status	Rental Transaction	1 Bobcat L28 Fresh Arrival	Daily	\$150.00	3.00	\$450.00	2/3/2025, 4:00 PM	2/6/2025, 4:00 PM	Reserved	R-000000001
Rentable	Transaction	Rate	Quantity	Total Amount	Start Date	End Date	Status	Rental Transaction																			
1 Bobcat L28 Fresh Arrival	Daily	\$150.00	3.00	\$450.00	2/3/2025, 4:00 PM	2/6/2025, 4:00 PM	Reserved	R-000000001																			

Managing Rentals for a customer

Managing Rental Transactions from Contact Page

The **Native Rent** app allows users to efficiently manage rental transactions directly from a **Contact** record. This includes checking out reserved rental items and checking in returned items.

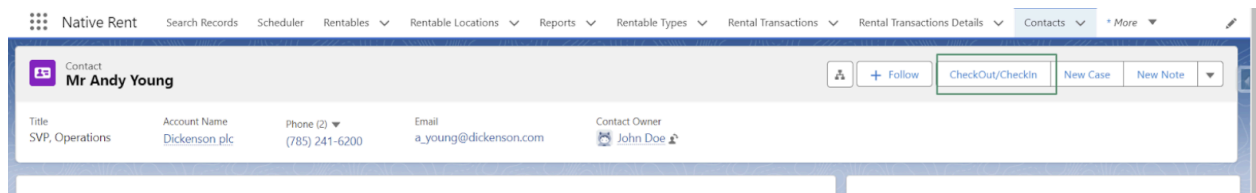
Steps to Manage Rental Transactions from the Contact Page

1. Navigate to the Contact Record

- Open the **Native Rent** app in Salesforce.
- Search for and select the **Contact** record of the customer.

2. Click the “CheckOut/CheckIn” Button

- Locate the **CheckOut/CheckIn** button on the contact page.
- Click on it to view all rental transactions associated with that contact.



3. View Rental Transactions

- The system will display a list of **Rental Transactions** linked to the selected contact.
- Each transaction will include details such as:
 - Rentable Item Name
 - Rental Start & End Dates
 - Rental Rate
 - Status (Reserved, Active, Completed)

CheckOut/CheckIn

Name: Andy Young
 Email : a_young@dickenson.com
 Phone :(785) 241-6200

Select Rent Transaction

2 of 2 items • 0 items selected

	Rental Transact...	Status	Start Date	End Date	Total
☐	RT-000000002	Reserved	2/3/2025, 04:00 PM	2/6/2025, 04:00 PM	\$450.00
☐	RT-000000001	Reserved	2/10/2025, 04:00 PM	2/11/2025, 04:00 PM	\$150.00

[Review Details](#)
[Check-out/In](#)

4. Review Transaction Details

- Select a transaction from the list to review its details.
- Verify information such as rental duration, pricing, and rental status.
- To checkout multiple Items for that contact, Turn on **Checkout All Items**.

Scheduler Rentables Rentable Types Rental Transactions Rental Rates Manufactures Models Rep

CheckOut/CheckIn

Check-Out

Name: **Andy Young**
 Email : a_young@dickenson.com
 Phone : (785) 241-6200

Checkout All Items ☒ All ☒ Email Notification

Rental Items Details

1 of 1 item • 1 item selected

	Name	Transaction...	Rate	Status	Start Date	End Date
☒	Bobcat L28 Rental Special	Daily	\$150.00	Reserved	2/10/2025, 04:00 PM	2/11/2025, 04:00 PM

[Previous](#)
[Next](#)

Clicking **Next** creates Rental Transaction record and Rental Transaction Details Records under it.

Native Rent

Search...

Native Rent Search Records Scheduler Rentables Rentable Types Rental Transactions Rental Rates Manufactures Models Reports Dashboards More

Rental Transaction RT-000000001

New Contact Edit New Opportunity

Details

Customer Andy Young	Status Checked Out
Start Date 2/10/2025, 4:00 PM	Rental Transaction Name RT-000000001
End Date 2/11/2025, 4:00 PM	Owner John Doe
Total \$150.00	
Created By John Doe , 2/17/2025, 2:41 AM	Last Modified By John Doe , 2/25/2025, 6:05 AM

Rental Transactions Details (1)

1 item • Sorted by Rentable • Updated a few seconds ago

Rentable ↑	Transactio...	Rate	Quantity	Total Amo...	Start Date	End Date	Status	Rental Transactio...
1 Bobcat L28 Rental Special	Daily	\$150.00	1.00	\$150.00	2/10/2025, 4:00 PM	2/11/2025, 4:00 PM	Checked Out	R-00000000

5. Confirm Rental Checkout (For Reserved Transactions)

- If the transaction is in **Reserved** status:
 - Clicking **CheckOut/CheckIn** will update the transaction to **Checked Out** status.
 - The rental item will now be marked as **Rented** and unavailable for other reservations.

6. Confirm Rental Check-In (For Active Transactions)

- If the transaction is in **Checked Out** status:
 - Clicking **CheckOut/CheckIn** will update the transaction to **Completed** status.
 - The rentable item will be marked as **Available** for future rentals.

Reporting and Analytics

Pre-built Reports

Native Rent includes a set of **pre-built reports** to help you monitor key aspects of your rental business. These reports are installed as part of the Native Rent package and can be accessed from the **Reports** tab in Salesforce.

How to Access Pre-built Reports

1. Go to the **Reports** tab in Salesforce.
2. Navigate to the **Native Rent** folder.
3. Select the report you want to view.

List of Pre-built Reports

1. **Checked-Out Rental Transactions:**
 - **Purpose:** Displays checked-out rental transactions grouped by customer.
 - **Details:** Checked-Out rental transactions grouped by Customer, including details about the rentable items, transaction dates, and amounts.
2. **Rental Inventory Report:**
 - **Purpose:** Provides an overview of all rentable items.
 - **Details:** Includes status, location, and key details of each rentable.
3. **Rental Transactions Report By Customer:**
 - **Purpose:** Tracks all rental transactions grouped by customer.
 - **Details:** Includes rentable items, transaction dates, and amounts.
4. **Rental Transactions Report:**
 - **Purpose:** Tracks all rental transactions.
 - **Details:** Includes rentable items, transaction dates, and amounts.

5. Transactions Details Report By Rentable:

- **Purpose:** Shows all rental transactions associated with each rentable item.
- **Details:** Includes transaction dates, customers, and amounts.

Customizing Reports

- Report Customization can be done through Salesforce. Visit [this](#) link to learn more.

Integration with Other Apps

The **Native Rent** app is designed to seamlessly integrate with other systems to enhance its functionality and streamline your rental management processes. While the app offers robust out-of-the-box features, custom integrations with external systems (e.g., invoicing, payment gateways, maintenance tracking) can be tailored to meet your specific business needs. Please reach out to the Native Rent support team to discuss your integration requirements.

Contacting Support

We are here to support you every step of the way! Whether you need help with setup, customization, or troubleshooting, our team is dedicated to ensuring you get the most out of **Native Rent**. Here's how you can reach us:

How to Reach the App's Support Team

1. Email Support:

- Send us an email at info@nativeerp.com for general inquiries or assistance.

2. Phone Support:

- Call our support number at [+1 312-278-7730](tel:+13122787730) during business hours (9:00 AM – 6:00 PM EST, Monday to Friday).

3. Help Center:

- Visit our website <https://NativeERP.com> and click on *Schedule a call* button on top right.
- Choose the option *Native Rent Meeting* or *30 Minute meeting* or *60 Minute Meeting* as per your needs.

4. Personalized Assistance

We understand that every business is unique, and we're committed to helping you succeed with **Native Rent**. To that end, we offer **personalized assistance** to guide you through the deployment process and ensure the app aligns perfectly with your business needs.

5. Schedule a Zoom Meeting with a Product Specialist

Would you like a one-on-one session with one of our product specialists? During this meeting, we can:

- Walk you through the setup process.
- Answer any questions you may have.
- Provide tailored advice to optimize **Native Rent** for your specific workflows.

Click the link below to schedule a Zoom meeting at your convenience:

 [Schedule a Meeting](#)

What to Expect During the Meeting

- A 30–60 minute session with a **Native Rent** expert.
- Guidance on best practices for managing rentals, assets, and fleets.
- Tips for leveraging automation and reporting tools.

We're Here to Help!

Your success is our priority. Don't hesitate to reach out—we're excited to help you unlock the full potential of **Native Rent**!

