Native Rent

Customization Guide

Version V 1.1

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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 specific 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 and 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 operational needs, offering drag-and-drop scheduling, color-coded availability, and 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.

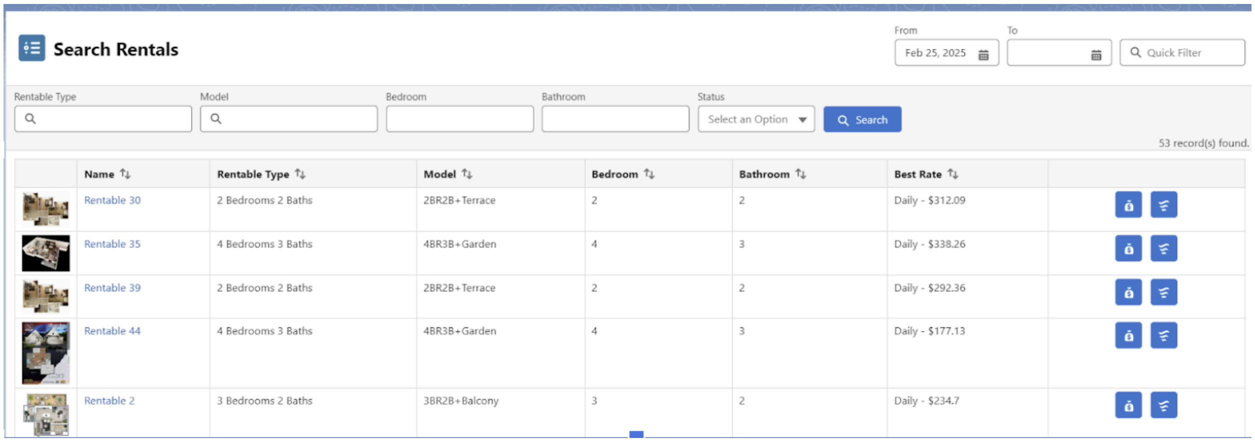
Why It Matters:

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

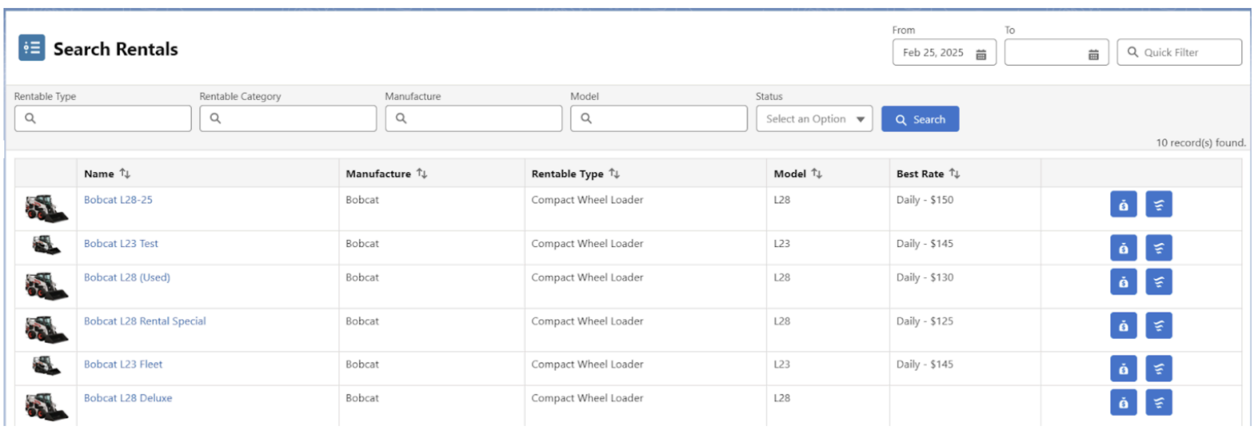
Use Cases:

- 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:



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



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.

Getting Started

App Customization

Add Custom Fields to Objects

The **Native Rent** app uses several custom objects to manage rental operations.

Steps to Add Custom Fields to Native Rent Custom Objects

1. Navigate to Object Manager

1. Go to **Setup** in Salesforce.
2. In the Quick Find box, type **Object Manager** and select it.

2. Select the Custom Object

1. Search for the custom object you want to modify (e.g., Rentable).
2. Click on the object name to open its details.

3. Create a Custom Field

1. In the left sidebar, click **Fields & Relationships**.
2. Click **New** to create a new custom field.

4. Choose Field Type

Select the appropriate field type based on the data you want to capture:

- **Text**: For short text entries (e.g., serial numbers, notes).
- **Number**: For numeric values (e.g., capacity, mileage).
- **Date**: For dates (e.g., maintenance due date).
- **Picklist**: For predefined options (e.g., asset condition: Excellent, Good, Poor).
- **Lookup Relationship**: To link to another object (e.g., linking a rentable item to a maintenance log).
- **Formula**: For calculated fields (e.g., total rental cost based on duration and rate).

5. Configure Field Details

- **Field Label**: Enter a user-friendly label for the field (e.g., “Maintenance Due Date”).
- **Field Name**: This will auto-populate based on the label.
- **Description**: Add a brief description of the field’s purpose.
- **Help Text**: Guide users to fill out the field (optional).
- **Required**: Choose whether the field is mandatory.
- **Default Value**: Set a default value if applicable (optional).

6. Set Field-Level Security

1. Specify which profiles can view and edit the field.
2. Click **Next** to proceed.

7. Add to Page Layouts

1. Choose the page layouts where the field should appear (e.g., Rentable Layout, Rental Transaction Layout).
2. Click **Next** and then **Save**.

8. Test the Custom Field

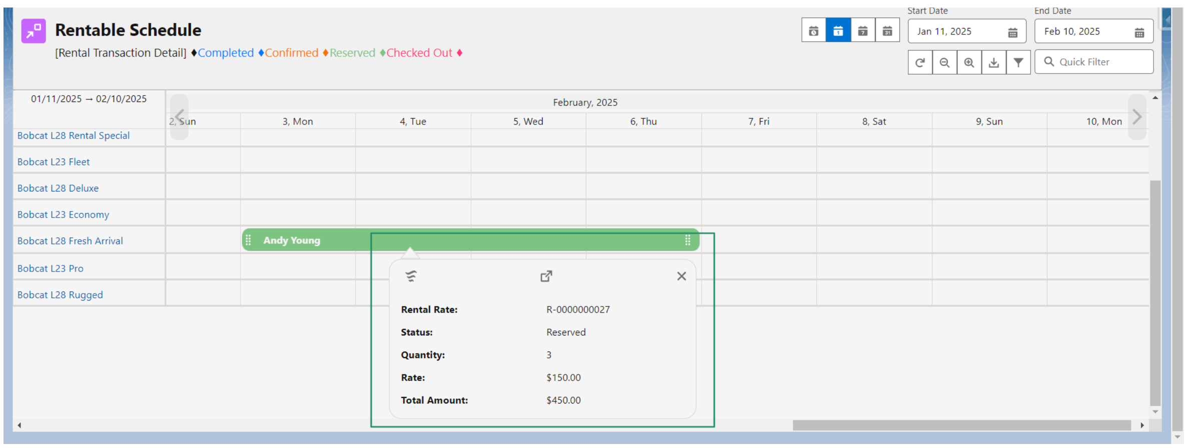
- Navigate to the object’s record page (e.g., a Rentable record).
- Verify that the custom field appears and functions as expected.

By following these steps, you can extend the functionality of Native Rent's custom objects to better align with your business processes. For further assistance, refer to Salesforce's documentation or contact the Native Rent support team.

Customizing the scheduler

The Native Rent app includes a fully customizable scheduler that allows you to manage rental bookings, asset availability, and reservations easily. For a detailed step-by-step customization guide, visit the official documentation at Native Planner Customization Guide.

The popup, when checked on the scheduler record, is also customizable.



Customizing the search page

Search Filters and Search Results Configuration in Native Rent

The **Search Records** page in the Native Rent app allows you to customize **search filters** and **search results fields** to suit your specific business needs. Below is a step-by-step guide to configuring these fields:

1. Customizing Search Filters

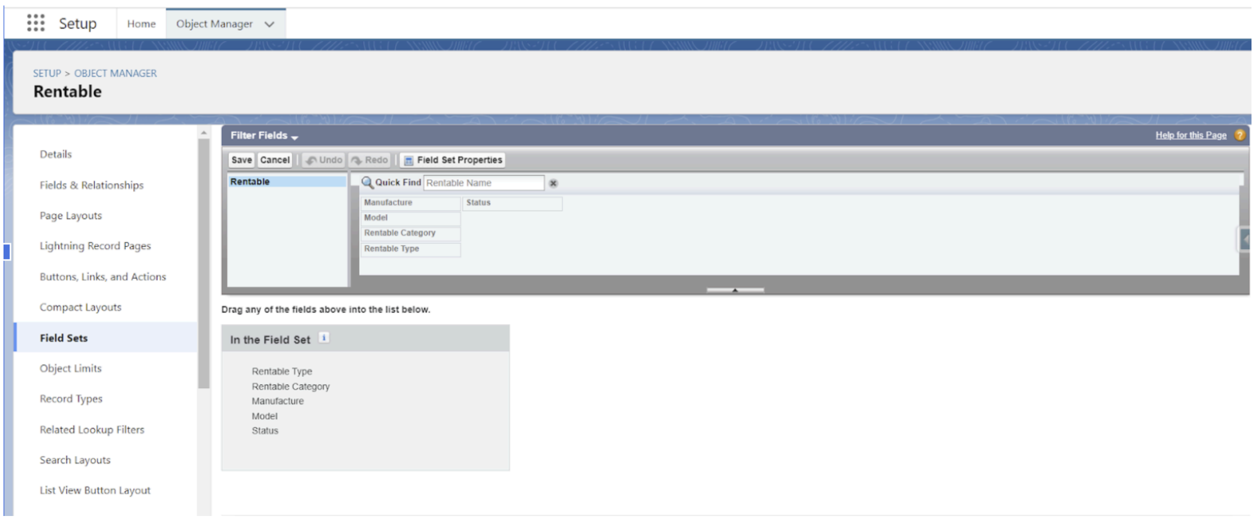
Search filters are used to refine the search results based on specific criteria. You can add or remove fields from the search bar by modifying the **Filter Fields** field set.

Steps to Customize Search Filters

1. **Go to Setup**:
   - Log in to Salesforce and navigate to **Setup**.

2. **Open Object Manager**:
   - In the Quick Find box, type **Object Manager** and select it.
3. **Select the Rentable Object**:
   - Search for and select the **Rentable** object.
4. **Go to Field Sets**:
   - In the left-hand menu, click on **Field Sets**.

   Refer to the screenshot below:



5. **Edit Filter Fields**:
   - Locate the **Filter Fields** field set.
   - Click on the field set name to open it.
6. **Add/Remove Fields**:
   - To **add a field**, drag it from the **Available Fields** section to the **Field Set** section.
   - To **remove a field**, drag it from the **Field Set** section back to the **Available Fields** section.
   - Arrange the fields in the desired order.
7. **Save the Field Set**:

- Click **Save** to apply your changes.

2. Customizing Search Results

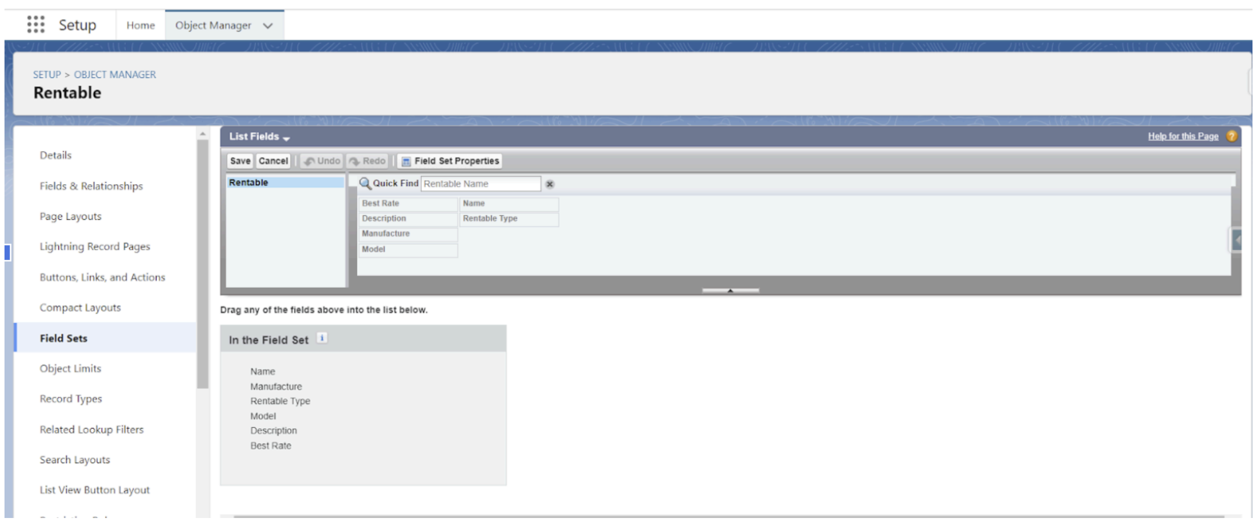
Search results fields determine which fields are displayed in the search results table. You can customize these fields by modifying the **List Fields** field set.

Steps to Customize Search Results

Repeat Steps 1 to 4 as above.

5. **Edit List Fields**:
    - Locate the **List Fields** field set.
    - Click on the field set name to open it.

   Refer to the screenshot below:



6. **Add/Remove Fields**:
    - To **add a field**, drag it from the **Available Fields** section to the **Field Set** section.
    - To **remove a field**, drag it from the **Field Set** section back to the **Available Fields** section.
7. **Save the Field Set**:
    - Click **Save** to apply your changes.
8. **Verify Changes**:

- Go to the **Search Records** page in the Native Rent app and check that the changes are reflected in the search filters and search results.

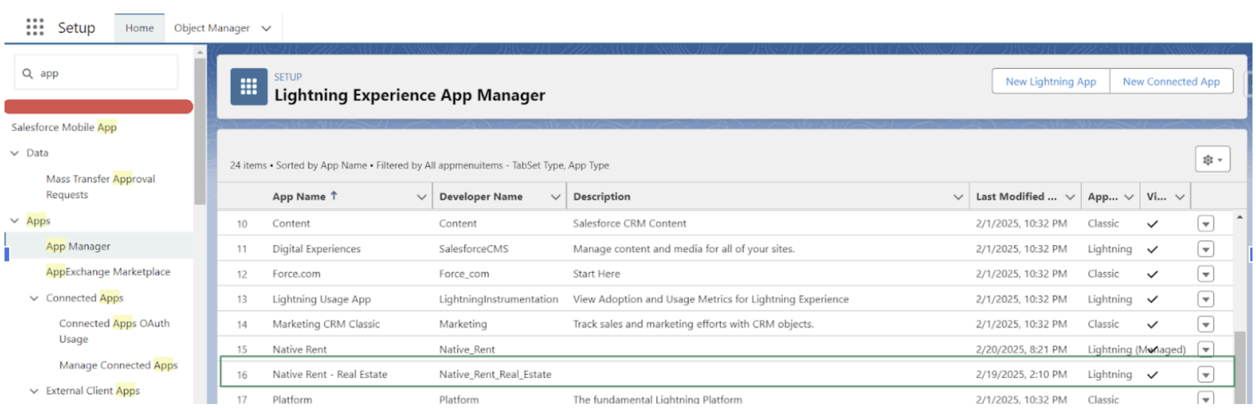
Editing Lightning Pages in Native Rent

Native Rent is a **managed package**. You cannot directly edit the Lightning pages included with the app. However, you can create a **custom app** and save customized versions of these pages to your app. Below is a step-by-step guide to achieve this:

Steps to Edit Lightning Pages in Native Rent

1. Create a Custom App

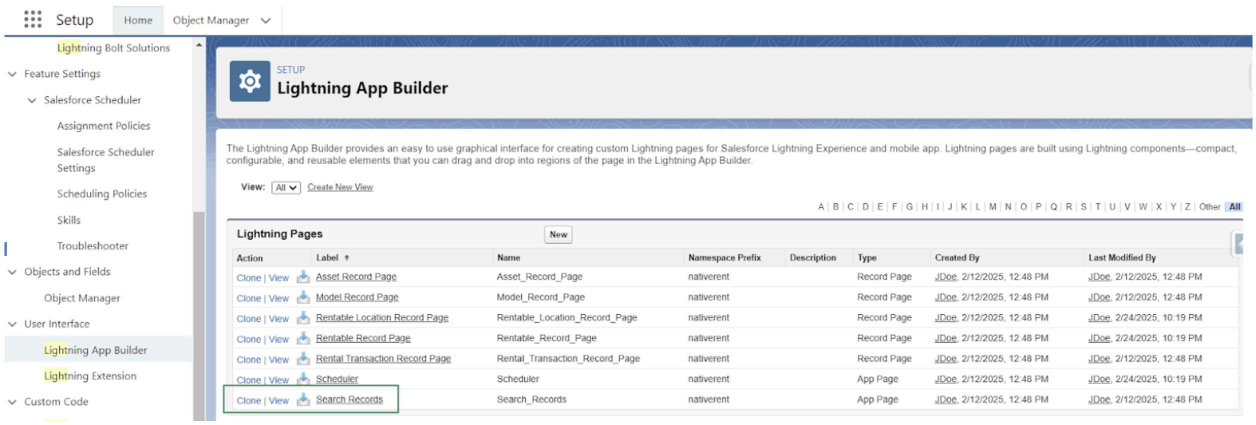
1. Go to **Setup**.
2. In the Quick Find box, type **App Manager** and select it.
3. Click **New Lightning App**.
4. Provide a name for your custom app (e.g., Native Rent - Real Estate).
5. Select the appropriate options for **App Branding**, **Utility Items**, and **Navigation Items**.
6. Click **Save**.



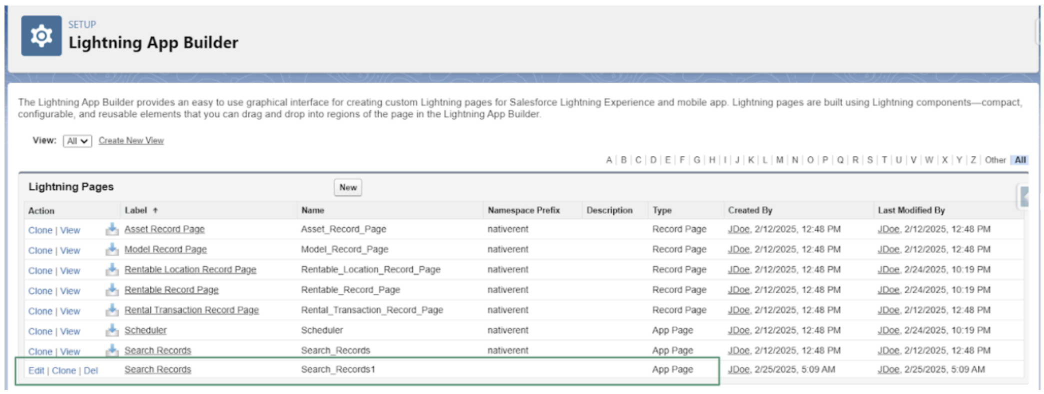
2. Clone the Native Rent Lightning Page

1. Go to **Setup**.
2. In the Quick Find box, type **Lightning App Builder** and select it.
3. Locate the Lightning page you want to customize (e.g., the **Search Records** page).

4. Click the **Clone** button to create a copy of the page.



5. Save the cloned page.

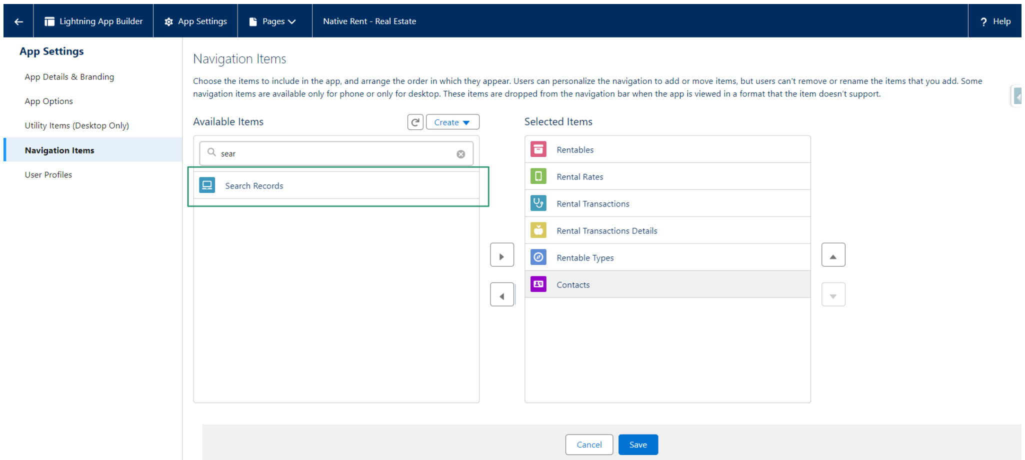


3. Edit the Cloned Lightning Page

1. Open the cloned Lightning page in the **Lightning App Builder**.
2. Make the desired changes to the page.
3. Save the changes.

4. Assign the Custom Page to Your App

1. Go to **App Manager**.
2. Select your custom app (e.g., Native Rent - Real Estate).
3. Click **Edit**.
4. Assign the customized Lightning page to the app by going to **Navigation Items**.



5. Click **Save**.

Search Page Configuration in Native Rent

The **Search Page** in the Native Rent app is a custom Lightning page designed to facilitate efficient rental searches. It allows users to filter and view records based on specific criteria, such as rentable items, rental transactions, and related details.

How to Add Configurations to the Search Page in Native Rent

To configure the **Search Records Page** in the Native Rent app, you need to edit the Lightning page and customize the Native **Search Records**. Below are the step-by-step instructions:

Steps to Add Configurations

1. Navigate to the Search Records Lightning Page

1. Open the **Lightning App Builder** in Salesforce Setup.
2. Go to the **Search Records** page.
3. Clone the page and save it.
4. Assign the cloned page to your custom app.

2. Access the Setup Menu

1. Open your custom app and navigate to the custom page tab.
2. Click on the **Setup Gear Icon** in the top-right corner of the Salesforce interface.

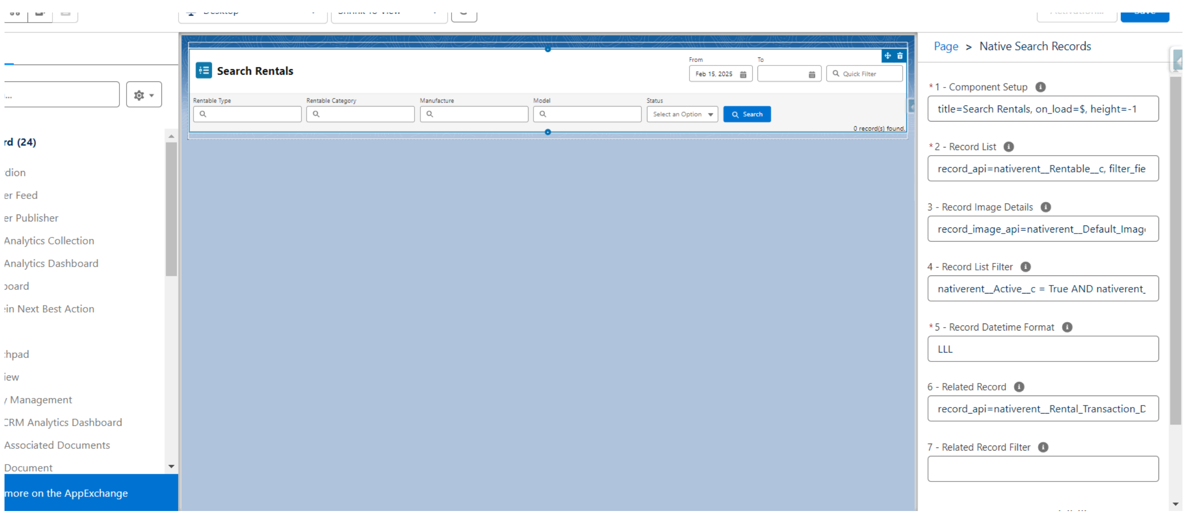
3. Select **Edit Page** from the dropdown menu.

3. Edit the Lightning Page

1. The **Lightning App Builder** will open, displaying the current layout of the Search Page.
2. Locate the **Search Component** on the page. It is usually a custom Lightning component named **"Native Search Records"**

4. Select the Search Component

1. Click on the **Search Component** to select it.
2. In the right-hand panel, you will see the **Properties** section, where you can configure the component.



5. Configurations

1. Enter the configuration parameters (e.g., title, record_api, filter_fieldset, etc.) in the appropriate fields.
   - Refer to the configuration details below for the parameters list and their descriptions.
2. Save your changes.

6. Save and Activate the Page

1. After configuring the Search Component, click **Save** in the Lightning App Builder.

2. Click **Activate** to make the changes live.
3. Assign the updated page to the appropriate app, record type, and profile.

Below is a detailed guide to configuring the Parameters of the **Native Search Records** component:

1. Search Component Setup

These settings define the appearance and behavior of the search component.

Parameter	Description	Example
title	Sets the header title of the component.	title=Native Records Search
title_size	Sets the font size of the header title.	title_size=22
icon	Adds an icon next to the title. Refer to Lightning Design System Icons.	icon=action_list_component
icon_scale	Sets the size of the icon. Options: small, medium and large.	icon_scale=medium
height	Sets the maximum height of the component. Use -1 to remove the height limit.	height=425
language	Defines the language used to format date fields	language=en
on_load	Defines the component behavior. Use $ to auto-search records on page load.	on_load=$
multi_select_flow	It specifies that the Flow API will open when clicking on the button next to the dates input.	multi_select_flow=nativerent__Find_Rentable_Rates
multi_select_flow_label	Sets the label for the flow button.	multi_select_flow_label=Open Flow
multi_select_flow_checkboxes	Control the checkboxes display mode on the record list table, when set to false, the flow button will always be visible.	multi_select_flow_checkboxes=false

2. Record List Configuration

These settings define the records displayed in the search results and the filters applied.

Parameter	Description	Example
record_api	Specifies the SObject API name for the records to display.	record_api=nativerent__Rentable__c
filter_fieldset	Defines the fieldset API for filter inputs.	filter_fieldset=nativerent__Filter_Fields
list_fieldset	Defines the fieldset API for fields displayed in the record list.	list_fieldset=nativerent__List_Fields
filter_logic	Specifies how filter fields are combined. Options: and, or.	filter_logic=and
action_button	It specifies that the Flow API will open when a button is clicked or use @ to open the record.	action_button=nativerent__Find_Rentable_Rates
action_button_label	Sets the label for the action button.	action_button_label=Open Flow
action_button_icon	Sets the icon for the action button.	action_button_icon=utility:moneybag
action_button_icon_size	Sets the size of the action button icon.	action_button_icon_size=medium
action_button_icon_helptext	Sets the help text displayed when hovering over the button.	action_button_icon_helptext=View Rates

3. Record Image Details

These settings configure the display of images in the record list.

Parameter	Description	Example
record_image_api	Specifies the field API for the image displayed in the first column.	record_image_api=nativerent__Default_Image__c
alt_text_api	Specifies the field API for the alt text displayed when hovering over the image.	alt_text_api=nativerent__Description__c
image_width	Sets the width of the image.	image_width=150

4. Record List Filter

Record List Filter	Defines a filter statement for the record list.	nativerent__Active__c = True AND nativerent__Is_Add_On__c = False AND nativerent__Number_of_Active_Rates__c > 0

5. **Record Datetime Format**

Record Datetime Format	Sets the format for DateTime fields in the record list.	LLL or DD-MM-YY

6. Related Record Configuration

These settings define how related records are displayed and filtered.

Parameter	Description	Example
record_api	Specifies the SObject API name for related records.	record_api=nativerent__Rental_Transaction_Detail__c
label_field	Specifies the field API for an extra column in the record list.	label_field=FIELD_API
related_to	Specifies the relationship field API linking the related record to the main record.	related_to=nativerent__Rentable__c
from_field	Specifies the field API for the start date filter.	from_field=nativerent__Start_Date__c
to_field	Specifies the field API for the end date filter.	to_field=nativerent__End_Date__c
from_to_field_format	Sets the format for date/time fields.	from_to_field_format=date
filter_logic	Specifies how filter fields are	filter_logic=and

	combined. Options: and, or.	

7. **Related Record Filter**

Related Record Filter	Defines a filter statement for related records.	nativerent__Status__c = 'Active'

Automation with Customizable Workflows

Native Rent Managed Package – Flow Overview

The **Native Rent** managed package includes a set of pre-built flows designed to streamline rental management process workflows. These flows can be **cloned and customized** to meet specific business requirements.

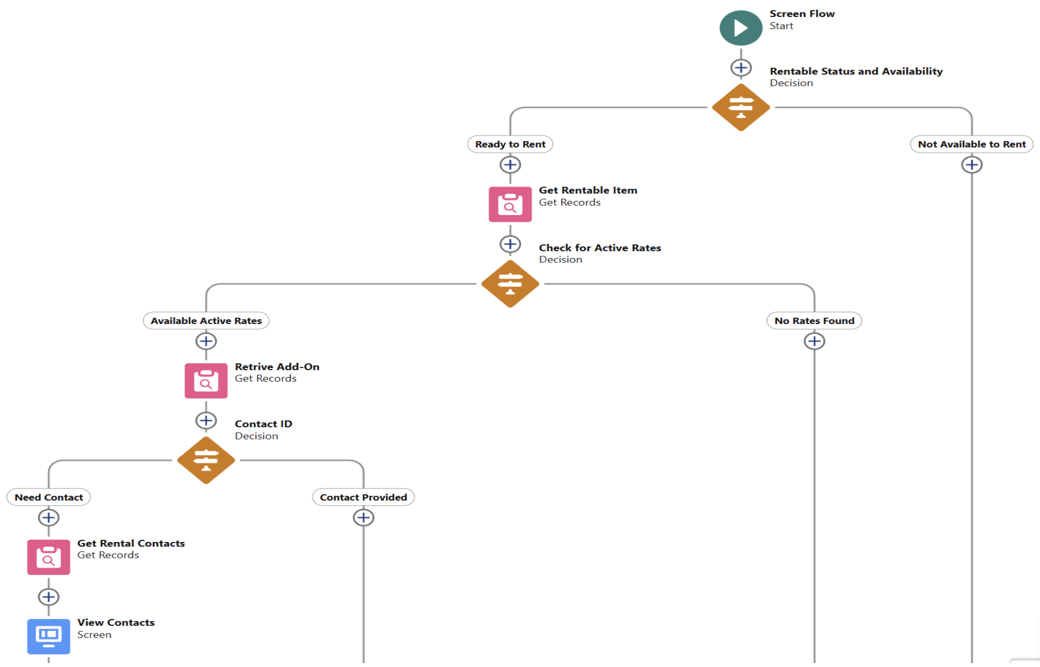
Key Flows in the Managed Package:

1. **Select_Rental_Transaction_For_Contact** – This enables users to select a rental transaction associated with a specific contact.
2. **Transaction_Detail_Flow** – Manages the detailed steps within a rental transaction.
3. **Rentable_Filter** – Helps filter rentable assets based on availability and other criteria.
4. **Rental_Process** – Handles the end-to-end rental process workflow.
5. **Get_Contact_for_Rental** – Retrieves the relevant contact associated with a rental transaction.
6. **Native_Barcode_Scanner_Template** – Provides a barcode scanning template for asset check-in and check-out.
7. **Detail_Transaction_Rental_Flow** – Captures and processes detailed transaction information.
8. **Find_Rentable_Rates** – Identifies applicable rental rates based on asset type and duration.
9. **CheckIn_Flow** – Facilitates the check-in process for returned rentals.
10. **Checkout_Process** – Manages the rental checkout process for customers.
11. **Rental_Transaction_Detail_Remove_Rate_when_Change_Rental** – Adjusts rental rates when rental details are modified.
12. **Update_Rentable_Status_when_Transaction_Detail_Status_Change** – Updates asset status when transaction details change.
13. **NR_Change_Transactions_Detail_if_Rental_Transaction_Change_Status** – Adjusts transaction details when a rental transaction status is updated.

14. **Rentable_Status_when_Transaction_Detail_Status_Change_to_Complete** – Updates rentable asset status when a transaction is marked as complete.
15. **Best_Rate_Rentable_Update** – Highlight the best rental rate. These offer a **flexible foundation** for rental and can be customized as needed to fit specific business processes.

Let us walk through one of the main flows of Native Rent i.e., “Rental Process”

Locate and click on the “Rental Process” flow. It might look like something as shown below:



The flow depicts the step-by-step Rental Process as below:

1. Process Initiation (Triggered from a Rentable Record)

- The flow **starts from a Rentable record**, representing the item, equipment, vehicle, or property to be rented.
- The system fetches the Rentable record and checks its **availability status**.

2. Check Availability & Status

- The system determines whether the **Rentable is available** for the requested period.
- **Decision Point:**

- If the **Rentable is available**, the process moves forward.
- If the **Rentable is unavailable**, a **non-availability message** is displayed to the user, and the process stops.

3. Check for Active Rental Rates

- The system searches for **active rental rates** associated with the Rentable.
- **Decision Point:**
    - An error message is displayed if **no active rates** are found and the process stops.
    - If **active rates** are found, the process continues.

4. Retrieve and Apply Add-On Rates (If Configured)

- The system looks for **any add-on rates** configured for the leading rental equipment.
- If found, these add-on rates are **applied automatically** to the rental.

5. Identify Customer Contacts for the Rental

- The system searches for the **customer contact(s)** to whom the equipment will be rented.
- **Decision Point:**
    - If the **contact already exists**, it is selected.
    - If a **new contact needs to be created**, the system provides a **quick contact creation** option on the go.

6. Capture Rental Period (Start and End Dates)

- The user is prompted to **enter the start and end dates** for the rental reservation.
- The system then **rechecks availability** for the provided period.
- **Decision Point:**
    - The process moves forward if the equipment is **available for the selected dates**.

- If **not available**, an error or alternative message is shown.

7. Include Add-On Accessories or Additional Rentables (If Necessary)

- If **mandatory or elective add-ons** (e.g., accessories, additional rentable items) are required, the system allows users to **select and add them**.

8. Retrieve and Apply Additional Charges

- The system retrieves **all applicable charges**, which may include:
  - **Mandatory fees** (e.g., insurance, security deposit).
  - **Elective charges** (e.g., optional services).
  - **Other additional charges** (e.g., admin fees).

9. Display Transaction Summary for Confirmation

- A **summary of the transaction** is displayed, showing:
  - Selected rentable item(s).
  - Rental period.
  - Applied rates and add-ons.
  - Total cost, including all charges.
- The user **reviews and confirms** the transaction.

10. Create a Rental Transaction Record

- Upon user confirmation, the system **creates a Rental Transaction record**.
- Under this, it also **creates individual transaction detail records** to capture specific rental details.

11. Handle Errors (If Any)

- An error message is displayed to the user if any error occurs during the process (e.g., missing information, unavailability).
- The process stops until the error is resolved.

Summary of the Rental Flow:

Starts with a Rentable record → Checks availability & rates → Validates customer → Captures rental period → Adds required add-ons → Retrieves charges → Displays summary → Creates transaction → Handles errors.

You can check all other flows provided by Native Rent.

Users can use the prebuilt flows -available as flow templates- to create new customized flows as needed by their specific business process.

Managing Rental Assets

Adding Assets

1. **Manufacturers Object in Native Rent**

The **Manufacturers** object in the Native Rent app stores records that identify the manufacturing company, make, or management company associated with rentable items (e.g., equipment, vehicles, rental homes). This object helps you track and manage the manufacturers or providers of your rental assets.

Steps to Create a Manufacturer Record

1. **Navigate to the Manufacturers Tab**:
    - Open the **Native Rent** app in Salesforce.
    - Go to the **Manufacturers** tab.
2. **Click the "New" Button**:
    - Click the **New** button to create a new manufacturer record.
3. **Enter Manufacturer Details**:
    - **Name**: Provide a name for the manufacturer (e.g., "Caterpillar Inc." for equipment or "Toyota" for vehicles).
    - **Account**: Select an existing **Account** record that represents the manufacturer. If the account does not exist, create a new account first.

4. **Save the Record**:

- Click **Save** to create the manufacturer record.

2. Models Object in Native Rent

The **Models** object in the Native Rent app stores records identifying the specific models of rentable items (e.g., equipment, vehicles, rental properties) provided by their manufacturers. This object helps you track and manage the different models associated with your rental assets.

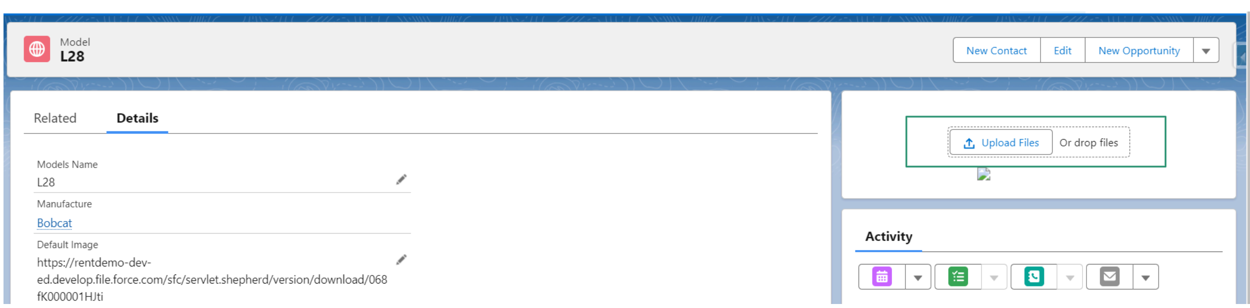
Steps to Create a Model Record

1. **Navigate to the Models Tab**:
   - Open the **Native Rent** app in Salesforce.
   - Go to the **Models** tab.
2. **Click the "New" Button**:
   - Click the **New** button to create a new model record.
3. **Enter Model Details**:
   - **Name**: Provide a name for the model (e.g., "Excavator 320" for equipment or "Camry" for vehicles).
   - **Manufacturer**: Select the **Manufacturer** record associated with this model.
4. **Save the Record**:

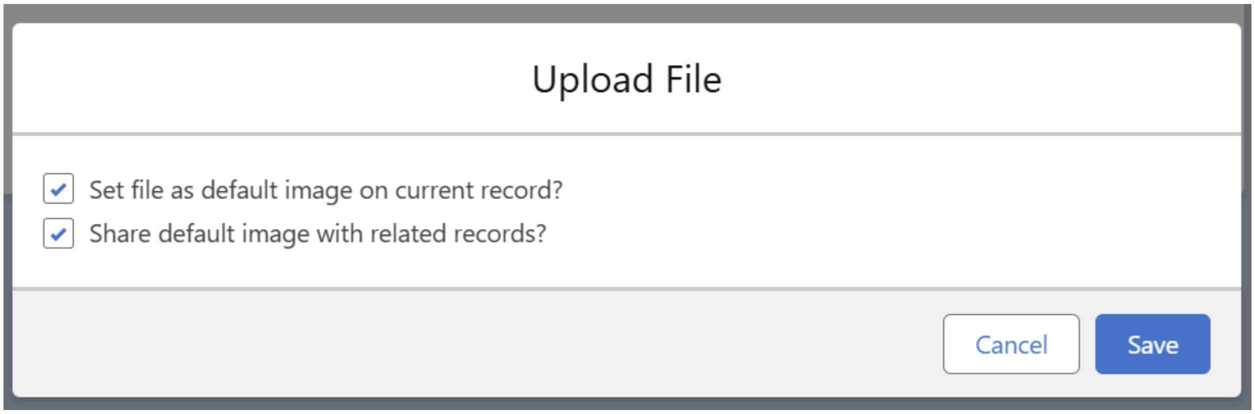
Click **Save** to create the model record.

Adding images at the Model level

Go to a model record and click on upload files (or drop files) to add an image.



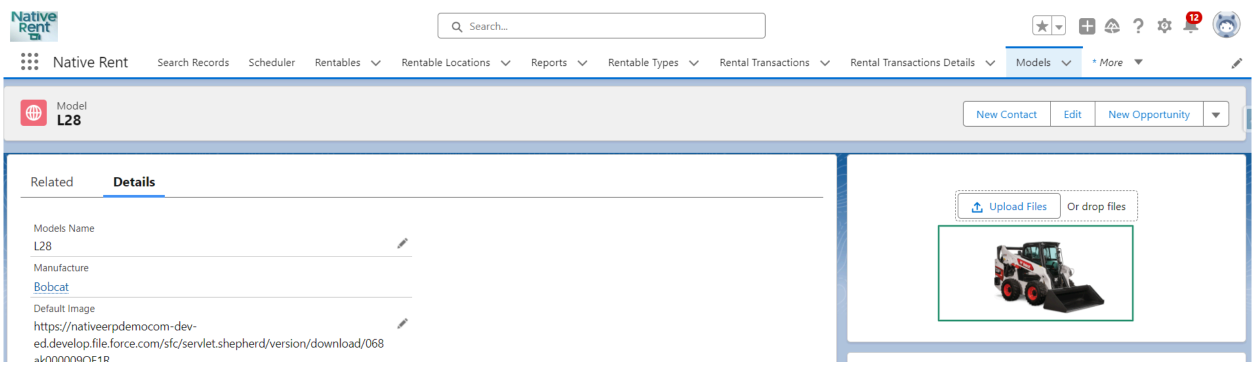
Select the image and click on "Open"



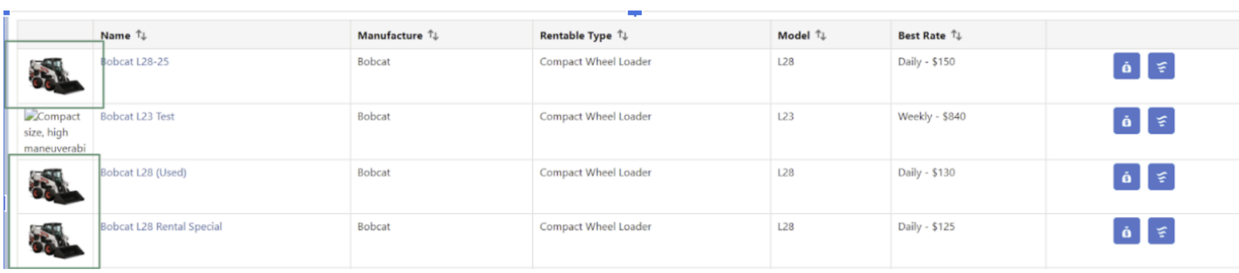
Select the first option to set the image only for the current record.

Select both options to share the image with all Rentable records with the same model record.

For example, the model record below shares its image with all related rentable records.



This image is reflected in all related records now.



Rentable Categories and Types

3. Rentable Category Object in Native Rent

The **Rentable Category** object defines broad classifications of rentable assets (e.g., Vehicles, Equipment, Properties).

How to Create a Rentable Category Record

Steps to Create a Rentable Category Record

1. **Navigate to the Rentable Categories Tab**
   - Open **Native Rent** and go to the **Rentable Categories** tab.
2. **Click the "New" Button**
   - Click **New** to create a new rentable category.
3. **Enter Category Details**
   - **Name**: Provide a category name (e.g., Vehicles, Construction Equipment).
   - **Description**: (Optional) Add details describing the category.
4. **Save the Record**

4. Rentable Type Object in Native Rent

The **Rentable Type** object is a sub-classification under **Rentable Category** (e.g., SUVs under Vehicles, Excavators under Equipment).

Steps to Create a Rentable Type Record

1. **Navigate to the Rentable Types Tab**
   - Open **Native Rent** and go to the **Rentable Types** tab.
2. **Click the "New" Button**
   - Click **New** to create a new rentable type.
3. **Enter Rentable Type Details**
   - **Name**: Provide a name (e.g., Sedan, Bulldozer).
   - **Category**: Select the related **Rentable Category**.
4. Click **Save** to **Save the Record**

Creating Rentables

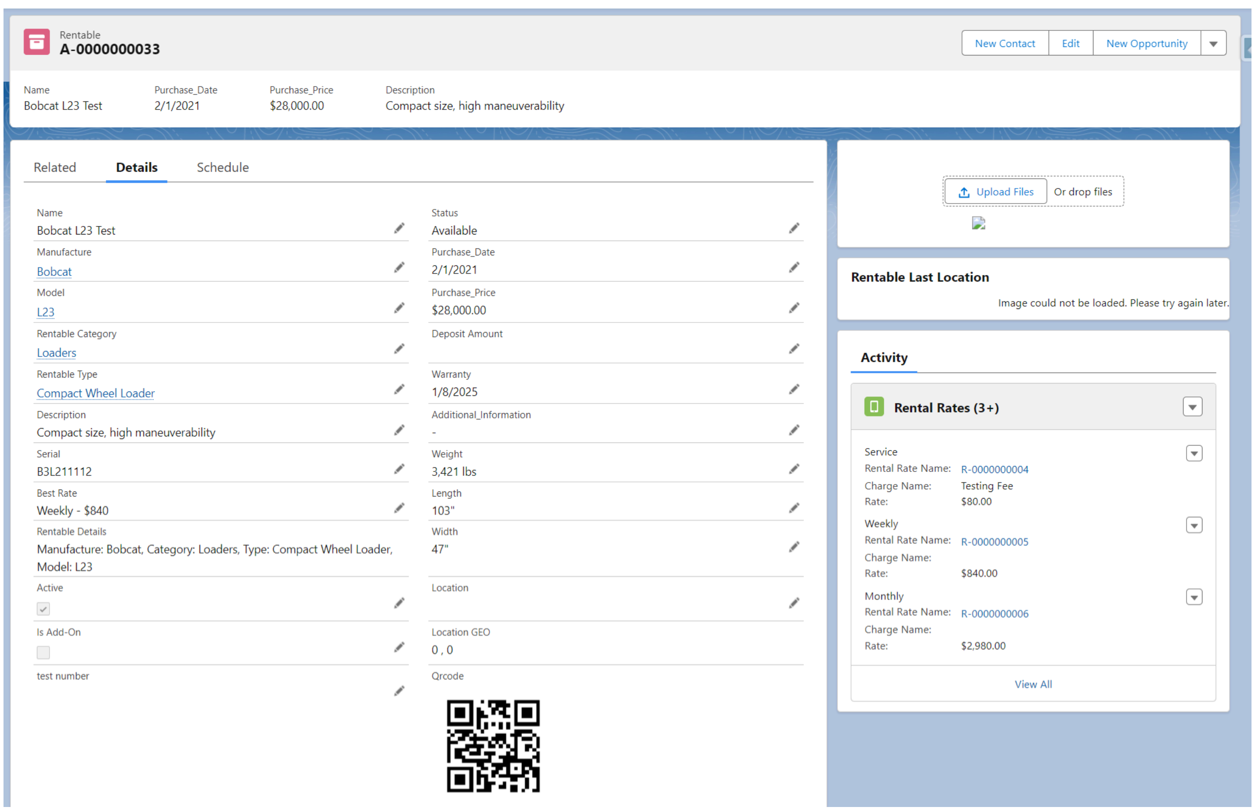
5. Rentable Object in Native Rent

The **Rentable** object in the **Native Rent** Salesforce app represents individual assets that can be rented out, such as equipment, vehicles, or properties. Each record in the **Rentable** object contains detailed information about a rental asset, including its specifications, manufacturer, category, pricing, and availability.

Steps to Create a Rentable Record

1. **Navigate to the Rentables Tab**
    - Open **Native Rent** and go to the **Rentables** tab.
2. **Click the "New" Button**
    - Click **New** to create a new rentable asset.
3. **Enter Rentable Details**
4. **Save the Record**

Key Fields and Their Purpose in Rentable Object



1. **General Information**

- **Name**: Identifies the rentable asset (e.g., *Bobcat L23 Test*).
- **Manufacturer**: The company that produced the asset (e.g., *Bobcat*).
- **Model**: The specific model of the rentable item (e.g., *L23*).
- **Description**: Provides an overview of the asset's features and usage.
- **Photo**: One or more images can be uploaded for a rentable asset. These photos are then visible in the search result list.

2. **Categorization & Specifications**

- **Rentable Category**: Groups assets into categories such as Loaders, Vehicles, or Tools.
- **Rentable Type**: Specifies the subtype of the rentable asset (e.g., *Compact Wheel Loader*).
- **Serial Number**: A unique identifier for tracking the asset.
- **Is Add-On:** A checkbox indicating if the rentable is an add-on to the main Rentables under the specified Rentable Type or Rentable Category.

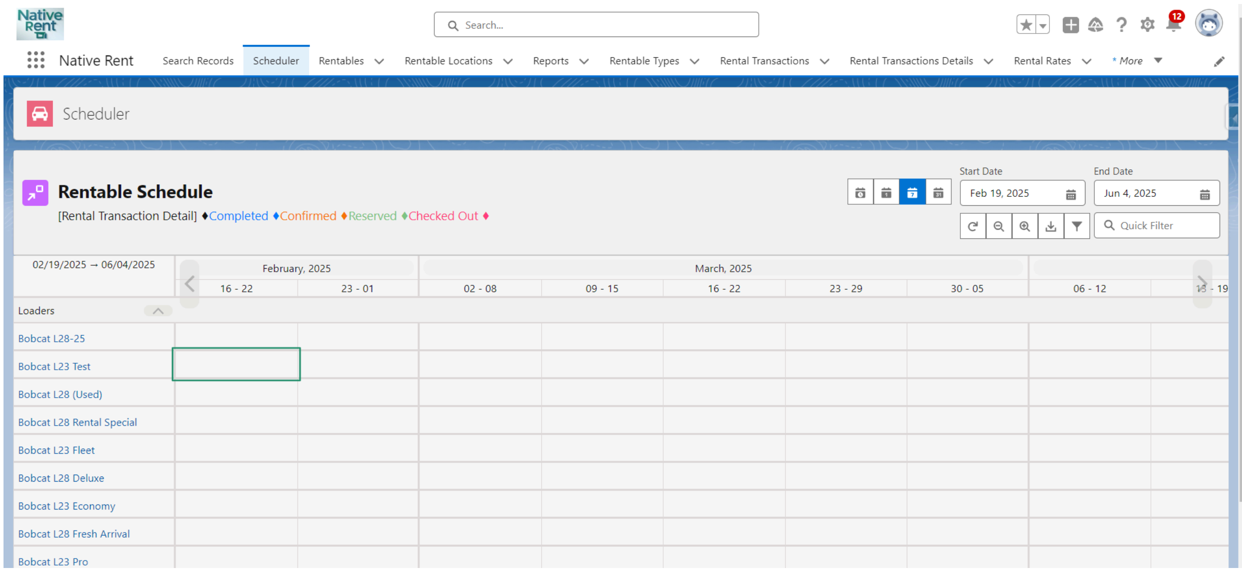
3. **Financial Information**

- **Purchase Date**: The date the asset was acquired.
- **Purchase Price**: The cost of acquiring the asset.
- **Deposit Amount**: (If applicable) The required deposit for renting this asset.
- **Warranty Expiry Date**: Indicates how long the asset is under warranty.

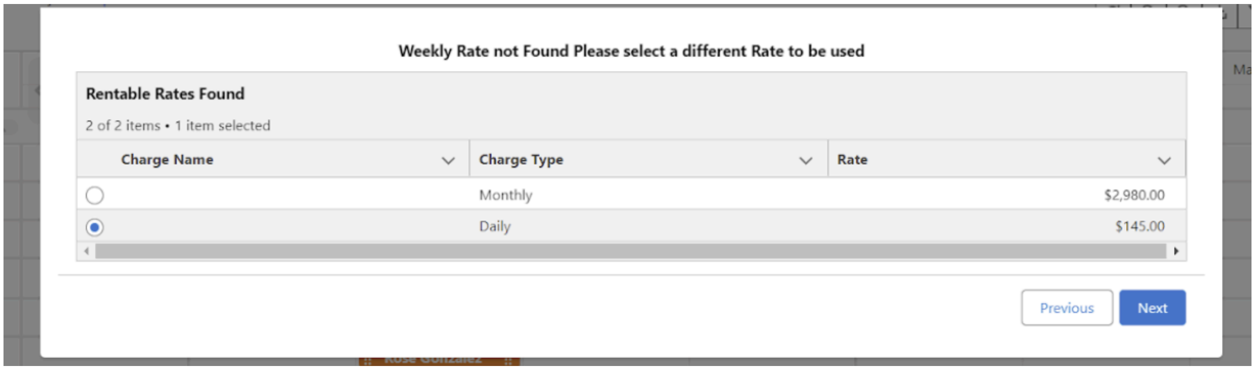
4. **Rental Rates & Pricing**

- Different rental rate options are available, such as Testing Fee, Weekly Rental Rate, Monthly Rental Rate etc.
- Rental rates are linked under the **Activity Section** and help determine pricing for different durations.

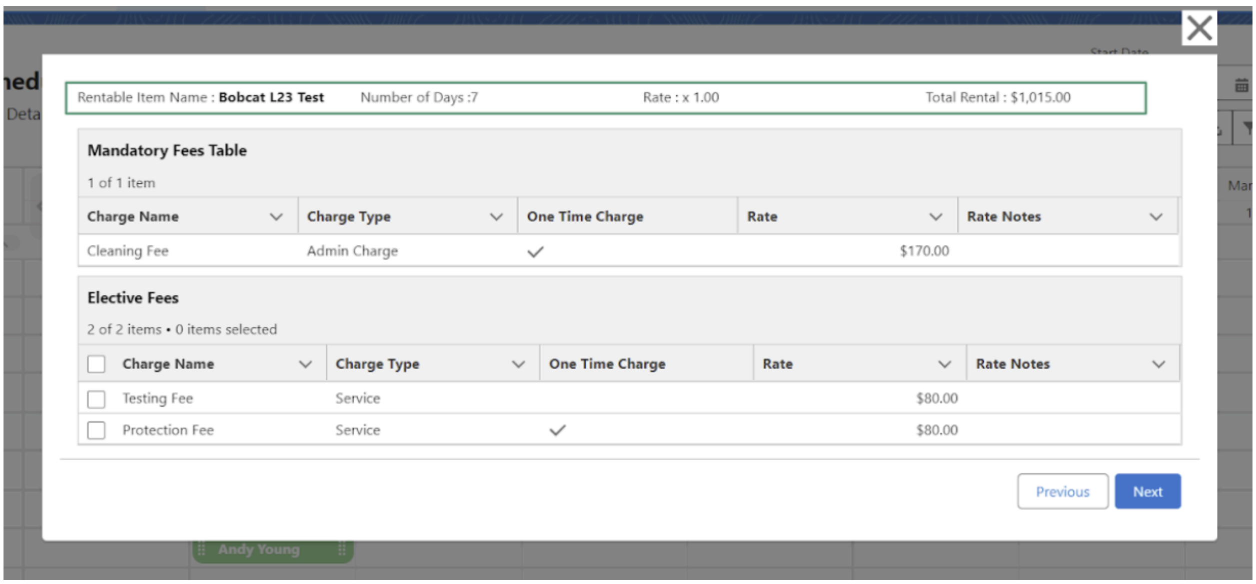
- Different rates configured for various durations, such as daily, weekly, monthly, etc. are picked up automatically based on the selected durations while checking out the rentables.
- If matching rates are not available, then the system automatically suggests the next best matching alternatives.



If a weekly rate is not available, then the system provides alternative rates.



Selecting the daily rate will prompt the system to calculate the weekly charge based on the daily rate.

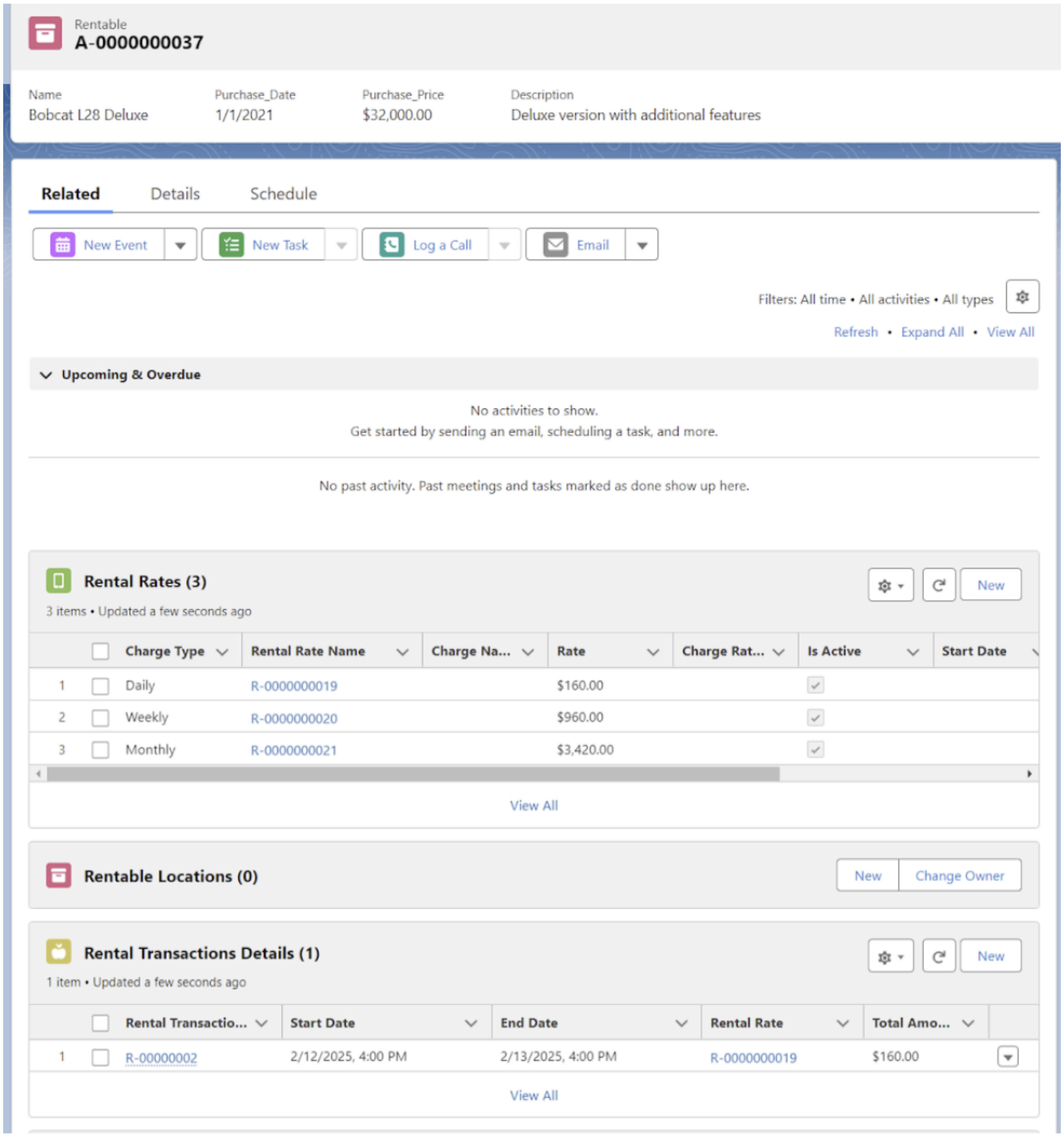


5. **Availability & Tracking**

- **Status**: Indicates whether the asset is available, rented, or under maintenance.
- **Best Rate**: This shows the most commonly used or cost-effective rental rate.
- **Location GEO**: Captures GPS coordinates to track the asset's location.
- **QR Code**: Allows quick scanning for inventory and rental operations.

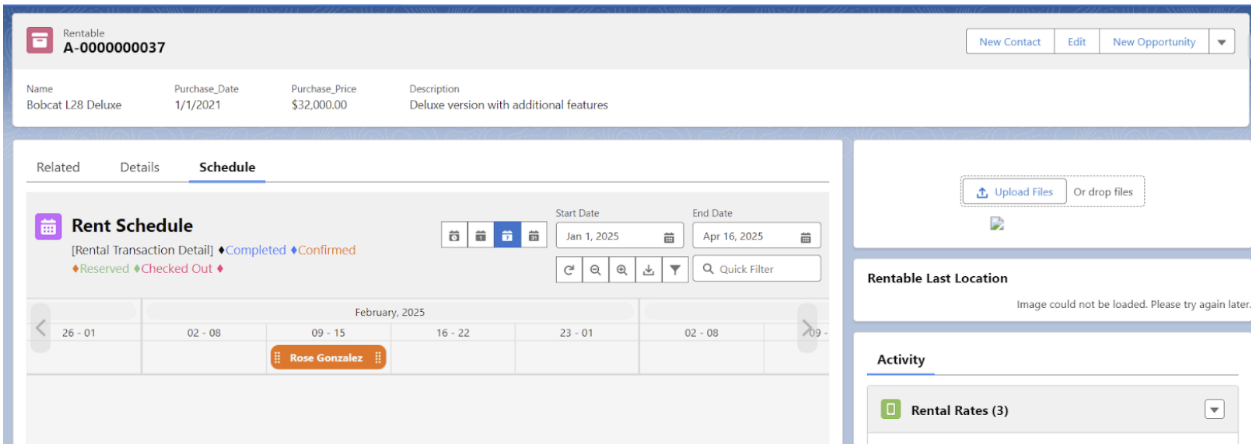
Related tab

The related tab shows all related records of a rentable Record, such as related rates, locations, and related rental transactions.



Schedule tab

The schedule tab shows a schedule view for that particular rentable.



Managing Rental Rates

6. Rental Rates Object in Native Rent

The **Rental Rates** object defines pricing structures for different rentable assets.

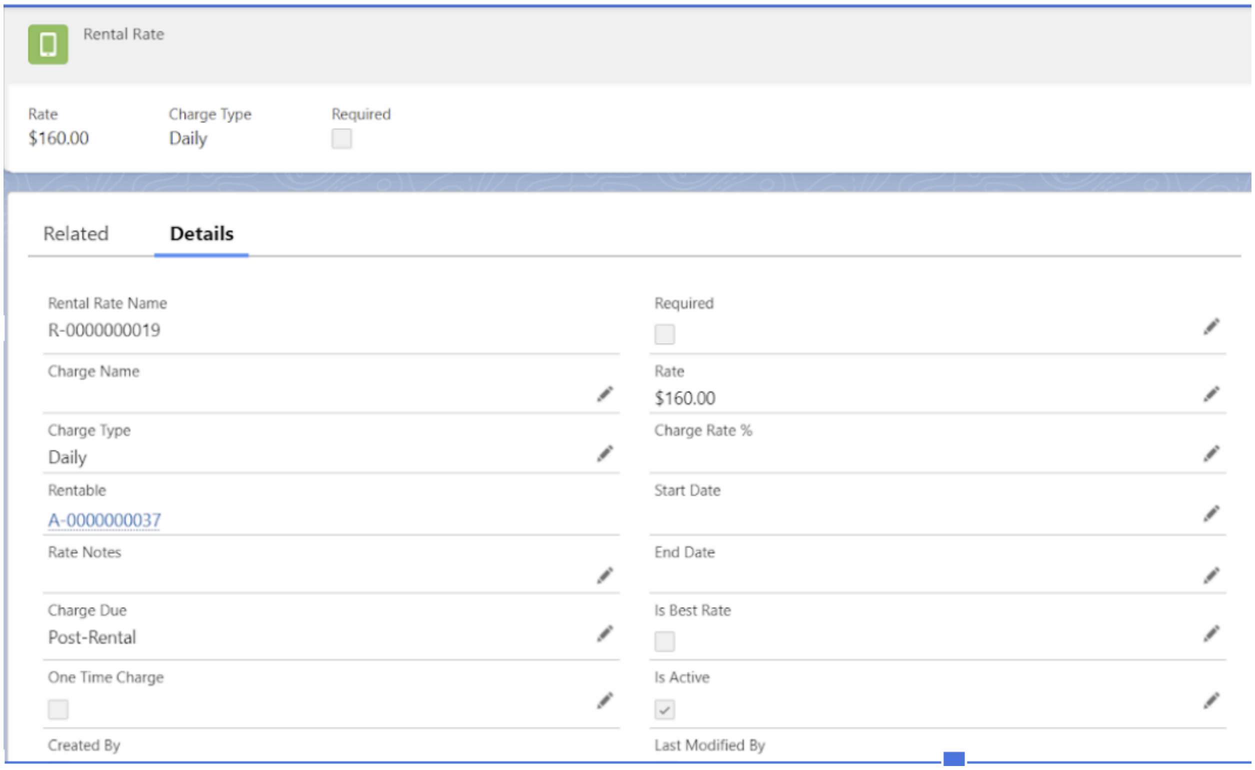
Rental Rate Setup in Native Rent

The **Rental Rate** record in the Native Rent Salesforce app is a critical component for defining the pricing structure of rentable assets (e.g., equipment, vehicles, properties). Below is a detailed breakdown of the **Rental Rate** setup and best practices for configuration:

1. Rental Rate Creation

Steps to Create a Rental Rate Record

1. **Navigate to the Rental Rates Tab**
    - Open **Native Rent** and go to the **Rental Rates** tab.
2. **Click the "New" Button**
    - Click New to create a new rental rate.
3. **Enter Rental Rate Details**
4. **Save the Record**



Rental Rate attributes are as follows:

Rental Rate Name:

- A unique identifier is assigned to the rental rate (e.g., R-0000000019).
- This helps track and manage multiple rates for different rentable items.

Charge Type:

- Specifies the billing frequency (e.g., **Daily**, **Hourly**, **Weekly**, **Monthly**).
- Example: Daily indicates the rate is applied per day.

Rate:

- The amount charged for the rentable item (e.g., $160.00).

Rate notes:

- Add any notes relevant to the Rate Record.

Required

- If checked, this checkbox ensures that the rate fee is mandatory for consideration and cannot be skipped from rental Calculations.

Association with a Rentable Asset

Rentable:

- The rental rate is linked to a specific rentable item (e.g., A-0000000037).
- This ensures the rate is applied only to the associated rentable.

Charge Details

Charge Due:

- Specifies when the charge is applied (e.g., **Post-Rental** means the amount is charged after the rental period).

One-Time Charge:

- If unchecked, the rate is applied repeatedly (e.g., daily, weekly).
- If checked, the rate is applied only once for the entire rental period.

Charge Rate %:

- Used for percentage-based calculations (e.g., discounts, taxes).
- If left empty, the rate is flat (e.g., $160.00).

Status and Metadata

Is Active:

- Indicates whether the rate is currently in use.

Is Best Rate:

- Highlights the most cost-effective rate for the rentable item.

Start Date and **End Date**:

- Defines the validity period of the rate. If left empty, the rate is available indefinitely.

Data Migration (if applicable)

Data Migration in Native Rent

Migrating existing data (e.g., assets, customers, rental transactions) into the **Native Rent** app is straightforward using Salesforce's standard import functionality. Below is a step-by-step guide to help you import data into Native Rent:

1. **Prepare Your Data**

    1. **Export Data from Source System**:

        - Export your existing data (e.g., assets, customers, rental transactions) from your current system into a CSV file.

    2. **Format the CSV File**:

        - Ensure the CSV file matches the required format for the target object in Native Rent.
        - Include column headers that match the field API names in Salesforce.
        - Remove unnecessary columns or data.
        - Order of data import

          This order ensures that dependencies between objects are correctly maintained when importing data into **Native Rent**. Here's why this sequence is essential:

          Order & Dependencies Explanation:

1. **Account** – Base entity representing businesses managing assets.
2. **Manufacturers** – Establishes the manufacturers of rentable assets (e.g., vehicle or equipment brands).
3. **Models** – Links to manufacturers, defining specific rentable asset models.
4. **Rentable Category** – Broad classification of rentable assets (e.g., Vehicles, Equipment, Properties).

5. **Rentable Type** – More specific classification under **Rentable Category** (e.g., SUVs under Vehicles, Cranes under Equipment).
6. **Rentable** – The actual rentable assets linked to models, categories, and types.
7. **Rental Rates** – Defines the pricing structure for rentable assets.
8. **Rental Locations** – Specifies locations where rentable assets are available.

Why This Order?

- **Accounts** are foundational for associating businesses with rentals.
- **Manufacturers and Models** must exist before linking them to rentables.
- **Categories and Types** ensure proper classification before adding rentable items.
- **Rental Rates and Locations** rely on existing rentable records.

2. Import Data into Native Rent

1. **Navigate to the Object**:
    - Go to the Salesforce object where you want to import data (e.g., Rentables, Contacts, Rental Transactions).
    - For example, to import rentable items, navigate to the **Rentables** tab in the Native Rent app.
    - Each object in Native Rent has an **Import** button available.
    - Click the **Import** button to start the data import process.
    - Follow the standard Salesforce Import process.

3. Required Permissions

Import Permission: Ensure you have the necessary permissions to import data into Salesforce.

- This typically requires the **"Import Custom Objects"** permission.

Object Permissions: Ensure you have **Create**, **Read**, **Edit**, and **Delete** permissions for the objects you import data into.

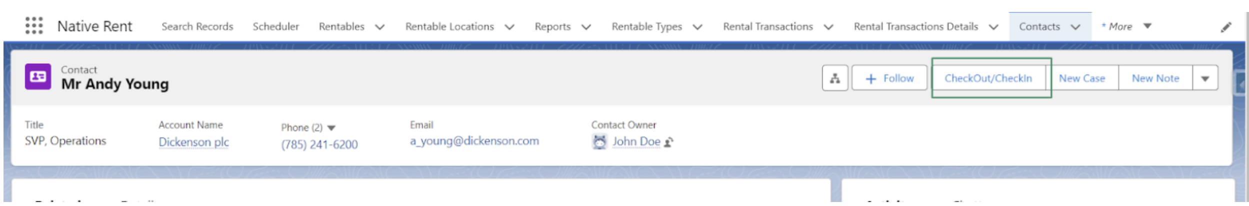
Managing Rentals for a customer

Managing Rental Transactions from the Contact Page

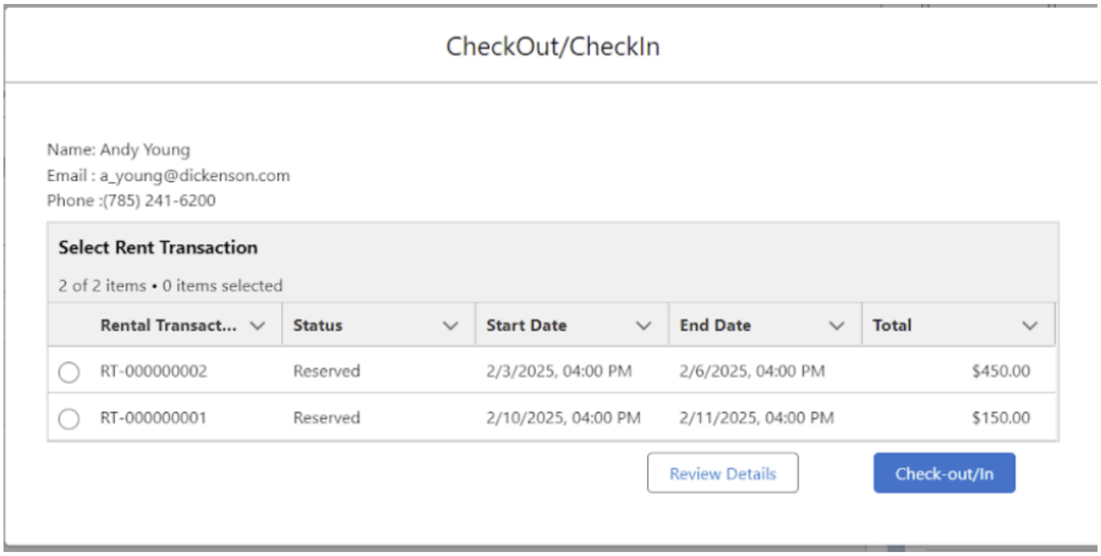
The **Native Rent** app allows users to efficiently manage rental transactions directly from a **Contact** record. This includes checking out reserved rental items and checking in returned items.

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 **customer's contact** record.
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.

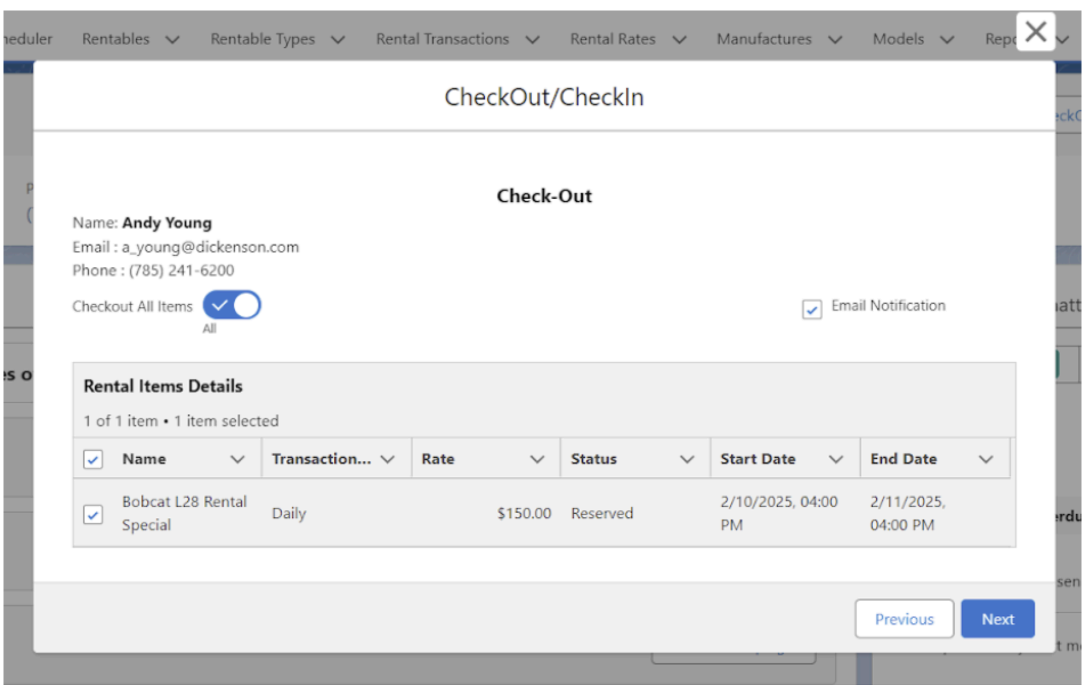


3. **View Rental Transactions**
    - The system will display a list of **Rental Transactions** linked to the selected contact.
    - Each transaction will include details such as:
        - Rentable Item Name
        - Rental Start & End Dates
        - Rental Rate
        - Status (Reserved, Active,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

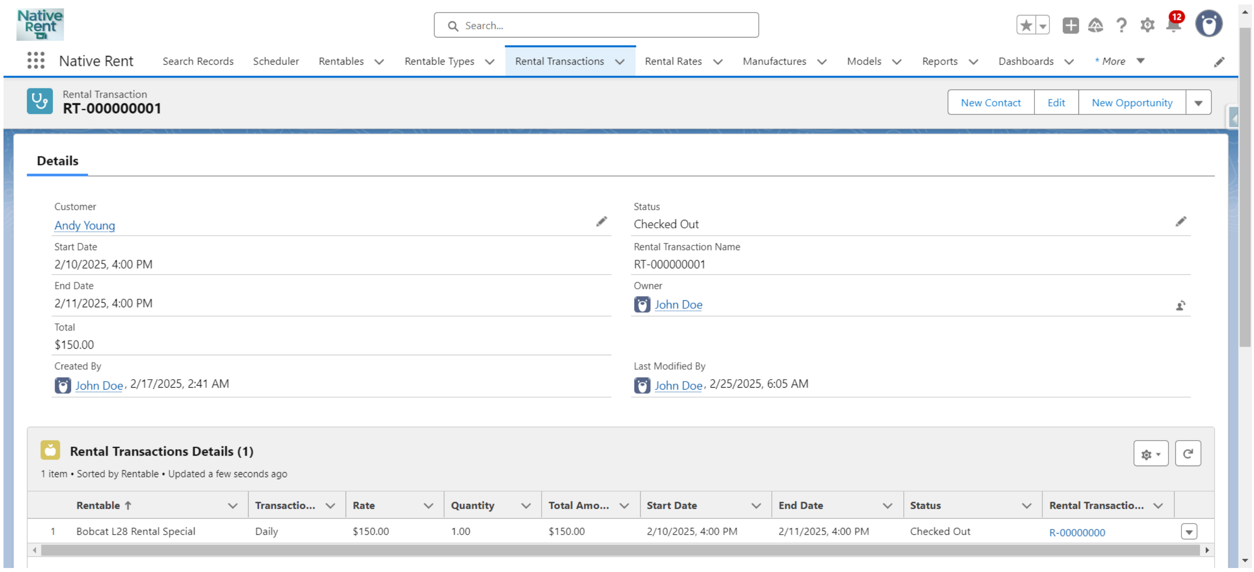


4. **Review Transaction Details**

- 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**.



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

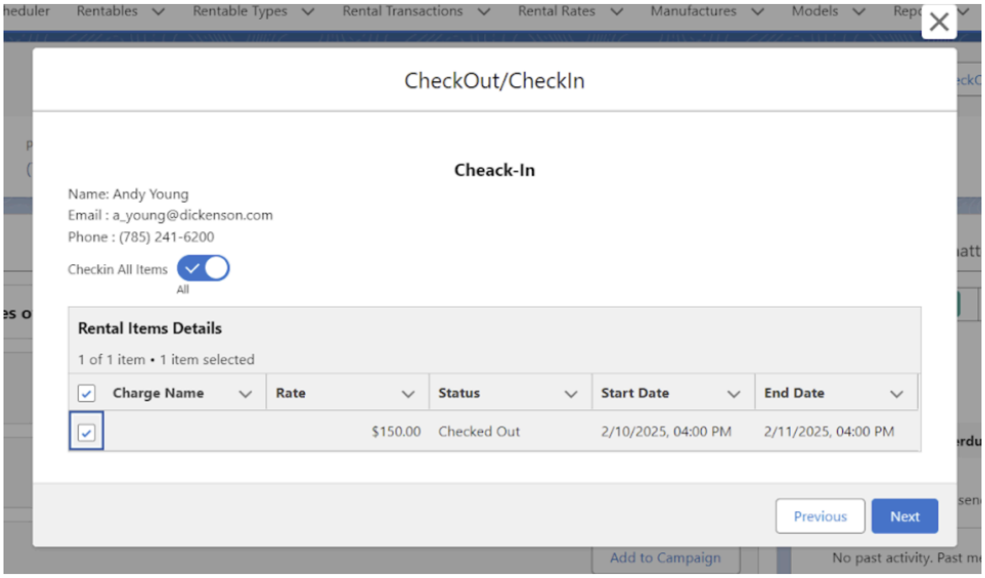


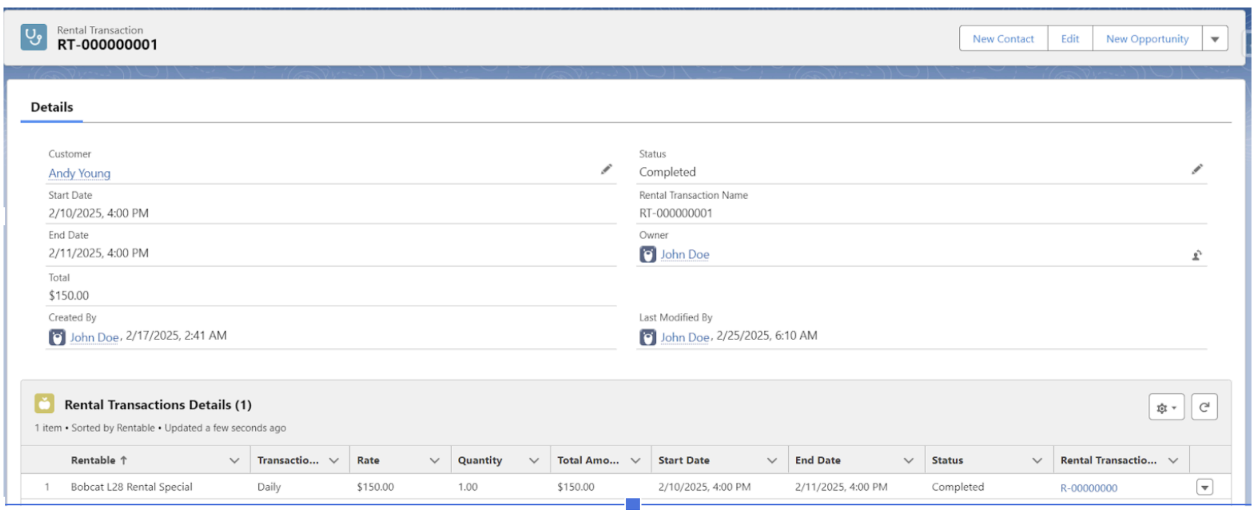
5. **Confirm Rental Checkout (For Reserved Transactions)**

- 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.





Business Flow: Rental Transaction Lifecycle

1. **Reservation** – A rental request is created under a Contact.
2. **Checkout** – The reservation is confirmed, and the Rentable is marked as **Rented**.
3. **CheckIn** – The Rentable is returned, and the transaction is completed. The Rentable is marked as Available.

Troubleshooting

Common Issues and Solutions

Troubleshooting Drag-and-Drop Issues in scheduler

- **Transaction Not Moving**:
    - Ensure you have the necessary permissions to edit rental transactions.
    - Check whether the transaction is locked or in a status that prevents changes (e.g., completed transactions).
- **Availability Conflicts**:
    - If the scheduler prevents you from dropping a transaction, it may be due to a conflict (e.g., the rentable is already booked for the selected dates).
    - Resolve conflicts by choosing a different rentable or adjusting the dates.
- **Data Not Updating**:
    - Refresh the scheduler to ensure changes are reflected.
    - Check for validation rules or workflows that may prevent updates.

Troubleshooting Map Issues

- **Map Not Displaying**:
    - Verify that the API key is valid and has not exceeded its usage limits.
    - Ensure that the required APIs are enabled in Google Cloud Console.
- **Incorrect Location**:
    - Check that the rentable's location data (e.g., GPS coordinates) is accurate and up to date.

The platform continuously improves, but you might encounter other errors and bugs. In this case, please contact the Native Rent Support team.

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** during business hours (9:00 AM – 6:00 PM EST, Monday to Friday).
3. **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:

- I will 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**!