RENTAL PROCESS MANAGEMENT (RPM)

An App by Suite Engine

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Meter Tracking Guide

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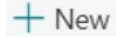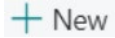
METER TRACKING GUIDE

This document presents Meter Tracking information regarding the Rental Process Management (RPM) functionality for Dynamics 365 Business Central.

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Meter Tracking – Single or Multiple

Meter readings allow for the recording of usage of a particular Unit. A meter reading could be in Hours, Miles, Kilometers, Gallons, Tire Tread Wear, Brake Pad Wear, etc. This could be used for equipment like Loaders, Forklifts, Cranes, Trailers, Dozers, other Vehicles, other Equipment, etc.

1. First, search   🔍   **RPM Subcategory List**, click on RPM Subcategory List.

2. Search or locate the subcategory you wish to place meter tracking against.

3. In the subcategory card, navigate your way down to the **Invoicing FastTab**. Find, **Meters Exist** and click on the highlighted **No** or Yes.

4. To create a New Meter Entry, click   ＋ New   at the top. Make entries for **Unit of Measure** (Mile), **Meter Resource No**. (Odometer), **Meter Resource Name** (Odometer) and check the box if the **Meter Reading** is **Required**.

5. If you have an additional Meter reading, click below the first for a new line and repeat the above steps. You should answer yet to the prompt to Update every related Unit that is part of the subcategory.

6. If you don't see a Unit of Measure to your liking, you can create a new one.

7. After clicking into the Unit of Measure field, click   ＋ New   on the bottom left. Give the new Unit of Measure code a name and description. **Click OK**.

8. You will now be back in the RPM Meter Setup. Complete the Meter Resource No. and the Meter Resource Name. You may also create a new Meter Resource No. if you don't find one to your liking.

9. After clicking into the Meter Resource No. field, click   ＋ New   on the bottom left. The card will open; complete the **No.** field, **Name**, and **Base Unit of Measure**. Scroll down to the Invoicing section and fill in the **Tax Group Code** and the **Gen. Prod. Posting Group**. **Click OK**.

10. You now will be back in the RPM Meter Setup. Don't forget to check the box if you want the line to have Meter Reading Required.

11. Returning to your Subcategory Card and scrolling down to the Invoicing section, you should now see that Meters Exist has gone from No to **Yes**.

Prices and Discounts, RPM Prices

12. Second, the Usage Allowance and Over usage pricing needs to be setup. From the subcategory unit card ribbon go to, **Prices and Discounts > RPM Prices**.

13. You are now in the RPM Prices and will notice associated entries. Find the pricing record that you would like to associate meter pricing with and navigate along the line to find the Meters Exist field and click on the word "**No**." You will now see your selected Unit of Measure codes for your Meter. Click, **Edit List** at the top.

14. You can now enter your desired values in the **Meter Reading No. of Days** (ex. 28), **Meter Reading Allowance** (ex. 1000), and **Meter Overage Unit Price** (ex. 0.05).

15. You are now finished with adding meters and prices.

In the RPM Contract

16. With all respected fields completed, choose the proper Subcategory and Unit No. on the Rental/Sales line. When you initiate the Shipping process, you will get a prompting stating, the **Unit requires a meter reading before shipping or receiving**.

17. Click OK.

18. From the Shipping/Receiving window's Ribbon go to **General > Unit Meter Readings**. Choose the correct Unit of Measure Code and enter the Reading and Reading Date. Do this step for each required Meter for the Unit. Remember these entries are prior to shipping the Unit out. Once you are done here, you can Close the window.

19. You now can post your Shipping as normal.

Mid-Rental Meter Reading

20. **As an example:** In the RPM Contract and after you have completed a cycle of billing, 28 days. You can take a meter reading at the end of the 28 days, before the next billing segment begins.

21. In the Rental/Sales lines FastTab, select the Subcategory/Unit line you would like to take a meter on and from the Line ribbon go to, **Manage > Line Meters**.

22. To enter Updated Readings, fill in values for **New Meter Date** and **New Meter Reading**.

23. You will now notice updated calculations for any excess usage on the line. You can affect this calculation by changing the **Select Thru Date**. Do the above steps for each line.

Invoicing for the Meter Sale Lines

24. If you would now like to invoice for these Meter Sale Lines, in the top right click on, **Create All Meter Sale Lines**. Click Yes.

25. Going back into the respected RPM Contact you will now see the meter lines have been added.

26. You are now ready to invoice.