ACUMENS

STAR Events Rental

FEATURE SUMMARY

Event and party rental management for Microsoft Dynamics 365 Business Central: from the first quote to the last returned item.

OVERVIEW

The complete event-rental cycle, in Business Central

Acumens STAR Events Rental runs the whole event-rental cycle: event and venue planning, quotes, contracts and deposits, re-rents from other suppliers, crew scheduling, warehouse packing and checking, truck routing, loading and dispatch, returns and invoicing. Business Central's standard ledgers, financial dimensions, item tracking, purchasing and Job Queue automation sit underneath it.



Feature areas

01 Setup and configuration
Central setup, numbering, defaults, roles, role centres

02 Event management
Events, venues, controllers, copying, cascade updates

03 Quoting and contracts
Quote-to-contract, release, locking, audit trail, archiving

04 Accessories and upselling
Suggested items, protective equipment

05 Fees and surcharges
Contract fees, credit card surcharges

06 Deposits and prepayments
Event and contract deposits, payments, credit memos

07 Re-rents (subrentals)
Re-rent purchase orders, return orders, lot tracking

08 Crew and labour scheduling
Resource planning and scheduling status

09 Warehouse packing
Simple packing, or full normal and bulk packing orders

10 Order checking
Verifying packed orders before loading

11 Dispatch and routing
Routes, stops, dispatch board, notifications

12 Truck loading
Loading orders, loading sequence, automatic shipment

13 Simple shipping and returns
Ship all and return all from the contract

14 Unloading and check-in
Unloading orders, damage notes, return shortages

15 Invoicing
Rental invoices and cycle billing

16 Automation and alerts
Job Queue processes, shortage alerts, emails

One platform, one database

Because the app runs inside Microsoft Dynamics 365 Business Central, rentals, inventory, purchasing and accounting share the same data. There's no double entry and nothing to reconcile between systems.

01 Setup and configuration

The rules, defaults and roles the rest of the app runs on.

Central rental setup
STAR Rental Setup

One setup page holds the operating rules:

- Packing and delivery lead times
- When late-night pickups start
- Default rental line type
- Dispatch screen refresh intervals
- Default route start and end times
- Default tax area for new customers
- Default return shortage reason
- Dispatch list report

Document numbering
No. Series

Separate number series for venues, events, routes, packing orders, bulk packing orders, checking orders, loading orders and unloading orders.

Event financial dimensions

Can create a customer project and an event dimension per event automatically, so profit can be reported per event in the general ledger.

Mandatory-field rules

Optional checks, such as requiring a product posting group on object types, and requiring pick and return dates before a re-rent purchase order can be released.

Asset hierarchy
Object Groups → Types → Objects

Serialised assets are grouped. Defaults such as item category and point value flow down from group to type to object to the rental line, and can be overridden at each level.

Point values

Each item or object carries a point value, with configurable rounding (nearest, up or down, to wholes, tenths or hundredths).

User roles

Each warehouse user is set up as a *Manager* (sees everything) or a *Picker* (sees only their own assigned work). *Night users* can't change truck details on loading orders.

Role centres and KPI tiles

A Dispatch role centre and a Resource Planning role centre, each with tiles that show counts of work waiting.

Test mode

Turns off the delivery-date filters on warehouse pages so test data can be created at any time.

02 Event management

Events sit at the centre: quotes, contracts, deposits and cancellations all hang off them.

Events and venues

An event record is created first. Many quotes and contracts link to one event and pick up its details.

Copy event

Copies an existing event together with its contracts, so repeat events are quick to set up.

Update linked contracts

Changes made to an event can be pushed to all its contracts in one action.

Event controller

A customer can be marked as the event controller, meaning the party that manages the event.

Event overview

The event shows how many contracts it has, with drill-down, plus its deposit position: amount invoiceable, posted and paid.

Event cancellation	Cancelling an event cancels all its contracts and releases their inventory reservations automatically.

03 Quoting and contract management

From the first quote to a released, locked and fully audited contract.

Rental quotes	A quote picks up the event's details. Its lines can be items, assets, labour (resources) or fees. Quotes can be printed or emailed.
Fast line entry Search terms	Type a search term, choose several items or resources at once, and the lines are added in the order the quantities were entered.
Quote-to-contract conversion	Converts one quote, or every quote for the same event in one step (Create Event Contracts).
Rental contracts	Contract lines hold the agreed quantity, a *days multiplier* for the rental period, the unit price, and whether the line is a rental or a sale. The contract moves through statuses such as Signed and Cancelled.
Contract release and pricing	Totals and tax are calculated when the contract is released, or on demand before that. Tax is worked out by simulating the rental invoice. A contract must be released before it can be invoiced or printed.
Contract locking	The contract opens read-only and has to be checked out to edit, so two people can't change it at the same time.
Audit trail Change Log	Changes to the contract header and lines are logged.
Contract versioning Archive on Print/E-mail	A version of the contract is archived automatically every time it's printed or emailed.
Contract notes	Comments can be tagged by purpose. Comments flagged as dispatch notes show up for warehouse staff during packing, checking and loading.
Contract cancellation	Cancelling a contract releases its line reservations.

04 Accessories and upselling

Prompts that add the right extras to every order.

Suggested items Accessories, options, upsells	Set up on an item or object type. When that item is added to a contract, a list of suggestions pops up. Each suggestion can be marked: • *Required*: at least one of these must be chosen • *No charge* • *Require pick*: goes through the normal packing process Suggestions are used instead of fixed kits because they're more flexible. An item blocked for rental can be turned into a sale on the spot.

Protective equipment Companion items such as covers	Linked to an item with a quantity per unit. Added to the contract automatically and kept in step when line quantities change or lines are deleted.

05 Fees and surcharges

Standard charges applied consistently, without manual lines.

Contract fees	Fees are set up as resources. A default fee list is copied to every new contract, can be adjusted per contract, and is calculated and added to the contract lines when it's released.
Credit card surcharge	A card fee is applied according to the payment method.
Automatic fee shipping	Fee and resource lines are marked as shipped automatically once the contract is signed. The sales tax line is kept off the invoice transfer so tax isn't counted twice.

06 Deposits and prepayments

Secure bookings and collect balances, at event or contract level.

Event or contract deposits	A deposit can be taken at event level or contract level, as a fixed amount or a percentage (for example 50%). The defaults come from setup.
One-click prepayment invoices	Creates and posts the prepayment invoice in one step. The amounts invoiceable, posted and paid update automatically.
Payment application	Customer payments are applied through the receipt journal, and the event and contract show the amount paid and whether they're paid in full.
Balance invoicing	A further prepayment invoice collects the remaining balance before the event.
Prepayment reversal	All prepayment documents for an event are listed in one place, and a prepayment credit memo can be created from that list.

07 Re-rents (subrentals)

Cover shortfalls from other suppliers and keep their stock separate from yours.

Subrental purchase orders	When a contract needs more stock than is available, a purchase order marked *Re-Rent* rents the shortfall from a vendor. Re-rent orders can be linked to a default subrental event.
Automatic return orders	A matching purchase return order is created automatically and kept in step with the purchase order: lines, quantities, return date and ship-to address.
Owned vs. re-rented stock	Lot numbers are assigned automatically when a purchase order is released. Bought stock gets your own lot and re-rented stock gets a vendor lot, so the two can always be told apart.

Re-rent logistics	Re-rent purchase orders and return orders can be added to route stops for vendor pickup and drop-off, and appear on loading and unloading orders.

08 Crew and labour scheduling

Staff and crew planned alongside the equipment.

Labour on contracts	Staff and crew are added to contracts as resource lines.
Resource planning	Only resources flagged as needing planning appear in the *Schedule Needed* list. They move to *Schedule Completed* once fully scheduled, or to *Schedule Cancelled* if the event is cancelled. Work is done from the Resource Planning role centre.

09 Warehouse packing (picking)

A setting (Simple Packing Enabled) chooses between simple packing for lighter operations and full warehouse packing with packing orders.

SIMPLE PACKING

Live pick list Packing Lines	Packing lines are created and kept in step automatically as contract lines are added, changed or deleted. Each line shows the current, packed and previous quantity, and the difference.
Pack confirmation	Ticking *Pack* records the packed quantity and what's still outstanding.

FULL WAREHOUSE PACKING

Normal and bulk packing orders	Each item category is set to normal packing (individual and serialised assets) or bulk packing (bulk stock). One packing order is created per contract and item category, by a scheduled batch based on the packing lead time or from the contract on demand.
Pick assignment and priority	A worksheet assigns packers and pick priority to packing orders, filtered by delivery date and item category. A separate page sets the packing sequence across contracts.
Packing tiles	My packing orders, messenger (same-day) orders, all orders, shortages, changes and cancelled packing.
Quantity entry	*Tally* (shortcut F2) takes an exact quantity or a formula. *Autofill* packs the full quantity in one click. When everything is packed, the order status changes to *Ready to Load*.
Serial number allocation Allocate Objects	Scan a serialised asset to assign it to a packing line. There's a warning if the asset is already on another order.
Box information and packer notes	Records boxes packed and packer comments. Item pictures and warehouse notes are shown on each line.
Change detection	Changes to the contract made after packing starts (quantity or delivery date) are highlighted in red. *Refresh Document* brings them into the packing order, and *Start Over* rebuilds it.

Bulk packing worksheet	Bulk packing lines shown as a summary by item that expands to detail. Every quantity change records the user, time and old value.
Shortage handling	A shortage tile lists packing lines that are short. The packer can email the shortage to the contract's salesperson, with one email per salesperson.

10 Order checking (quality control)

A second person verifies every packed order before it leaves.

Checking orders Ready to Check	Created from the packing order once a staging lane number is entered. Checking can be made mandatory in setup and can reuse the packing order number.
Checking tiles	My checking orders, messenger orders, all orders, checking shortages and checking changes.
Verification tools	• Box count check (can't exceed packed) • Tally and Autofill • Checker notes • Serial number scan • Review totals: ordered, packed, checked • Read-only packer and warehouse notes, pictures
Release to loading Ready to Load	Marks the order ready for loading. Checked quantities are written back to the contract lines.

11 Dispatch and routing

Plan routes, watch the day unfold and keep customers informed.

Routes	Each route holds its stops, trucks, vehicle type, drivers, helpers and loaders. Default start and end times come from setup. A truck is set up as a serialised asset.
Route stops	Each stop is a delivery or a pickup, with an address, times, status (Arrived or Delivered) and notes. Several contracts or re-rent orders at the same address can share one stop. Documents are added by scanning, and adding a contract offers the other contracts for the same event.
Reschedule handling	If a contract's delivery date moves later, it's removed from its route stop and its dispatch print flags are reset automatically.
Route sheet	Printed from the route list or the route card.
Live dispatch board Dispatch Grid	Shows the day's deliveries and pickups as tiles. It refreshes itself and shows a status picture for each stop: Created, In Progress, Completed, or Delayed Completed.
Same-day delivery monitor Messenger List	An all-day view of same-day deliveries. Lines turn red if no driver is assigned before the delivery is due.
Delivery confirmation emails	When a stop is completed, the customer or vendor gets an email automatically through the Job Queue, and the stop records that it was sent.

Box count check at delivery Driver Box Count	The box count the driver reports is compared with the packed box count, and any mismatch is flagged.
Dispatch list	Contracts due for delivery within the delivery lead time, for example the next two days.

12 Truck loading

Load in the right order and ship automatically on departure.

Loading orders	Created per route, and filled automatically with what each delivery stop needs: bulk items, box counts, protective covers and re-rent items.
Last-on, first-off loading	Lists are shown in reverse stop order, so the last stop's goods are loaded first. A loading sequence is recorded for every quantity entered.
Loading tools	• Tally and Autofill (can't exceed packed) • Filter by contract • Pictures • Show all, or only open lines • Warehouse, packing, checking and loading notes • Panel listing the route's contracts
Departure and automatic shipment	The order status goes from Completed to Departed once the departure time and the person who signed are recorded. A scheduled job then posts the loading order, which creates and posts the shipment and marks the contract lines as shipped.
Truck changes	The truck number can be changed when a loaded truck is swapped. Several trucks can share a delivery route, each with its own pickup route.
Loading tiles	Open orders, item shortages, box shortages, protective cover shortages and completed orders.

13 Shipping and returns (simple flow)

An alternative to the full loading and unloading process, for when goods go out and come back without route-based truck loading.

Ship all	Ships every line on a signed, released contract. It can post straight away, or create a shipment order to review first. Posted shipments can be viewed from the contract.
Return all Collection Order	Returns every line, again posted straight away or reviewed first. The contract closes when everything is back.

14 Unloading and return check-in

Check every item back in and catch damage and shortages early.

Unloading orders	Created when a truck comes back, by truck or route number. Lines are filled automatically from the route's pickup stops: one line per item, with detail lines per packing order.

Check-in tools	• Tally and Autofill (can't exceed loaded) • Serial number scan • Open the re-rent purchase order from a line • Unloading sequence • Filter by item category
Damage and shortage notes	Records damaged, broken or missing items for each unloading order.
Off-load report	Shows which returned items are short on upcoming packing orders, so staff can set them aside instead of putting them back on the shelf.
Automatic return posting	A scheduled job posts finished unloading orders, which creates and posts the collection order and marks the contract lines and inventory as returned.
Return shortage list	Lists contract lines that came back short, with reason codes and an *Adjusted* flag. It defaults to the previous pickup day.
Unloading tiles	In progress, completed and posted.

15 Invoicing

Bill exactly what was agreed, for as long as it's out.

Rental invoices	Created from the contract. Fees and tax match what was agreed on the contract.
Cycle billing	Sale lines are invoiced once. Rental lines can be billed periodically until their off-rent date.

16 Automation and alerts

Routine posting runs unattended and problems surface on their own.

Scheduled processing Job Queue	Creating packing orders, posting loading orders, posting unloading orders and sending stop-completion emails can all run unattended.
Consolidated shortage alert	As soon as a contract is assigned to a route stop, any shortage in packing, checking, bulk loading, box loading or protective covers is logged in one alert list. The entry clears itself when the shortage is resolved.
Automatic document flow	Optional direct posting of dispatch tickets, with shipment and collection orders created per customer or per customer and contract.

Acumens STAR Events Rental: every step of your rental business, in one system.

Built on Microsoft Dynamics 365 Business Central, so sales, the warehouse, the trucks and finance all work from the same live data.