OpenERP Rent Documentation

Release 0.4.0

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The OpenERP Rent module let you rent products to your customers. It supports both *service* and *stockable* products. OpenERP supports many reporting engines, but we decided to use Aeroo Report so you can edit your report directly inside *LibreOffice*.

Currently, OpenERP Rent is only compatible with OpenERP 6.0 (but should be ported to 6.1 as soon as possible).

Installation

You should follow these steps to install OpenER Rent. If you are familiar with git, you can directly clone the Github repository to get the latest version, else, read this page.

1.1 Download

The current version is 0.4.0 and can be downloaded from the Github project page (By clicking on the `Downloads` button). We provide a packaged version which includes all the dependancies.

Here is a list of the required modules, if you want to install them manually :

- Aeroo Report (6xRC4 or superior)
- Aeroo Lib (RC2 or superior)
- OpenLib (0.2.5 or superior)

Moreover, you need these python packages :

- genshi
- httplib2

1.2 Install modules

If you downloaded the packaged version, you should have a *zipfile* containing all the required modules. You must extract these modules in the directory `bin/addons` of the OpenERP Server.

Once all modules have been extracted, go to OpenERP `Administration->Modules->Update modules list` menu and refresh the list of availabe modules.

1.3 Install rent

Finally, install the `rent` module in OpenERP `Administration->Modules->Modules` view.

Configuration

OpenERP Rent is flexiable and let your configure a lot of things.

2.1 General configuration

You can configure OpenERP Rent in the company configuration tab. Go to `Administration->Company`, select your company and open to the `Configuration` tab. You should see a group named `Rent` containing configuration fields.

`Day begin`

> This field defines the begin time of a normal day. This value will be used as default value for new rent orders, depending on what you put in the `Rent default begin/shipping` field.

`Afternoon begin`

> This field defines the begin time of the afternoon (after launch). This value will be used as default value for new rent orders, depending on what you put in the `Rent default begin/shipping` field.

`Afternoon end`

> This field defines the time at which the work day is considered finished. This value will be used to defined the return time of products. For example, if you rent a product from the January 1st at 9am for 1 day, the default product return datetime will be January 1st at `Afternoon end` value.

`Rent default begin/shipping`

> This field defines the default begin datetime of your rent order and its assodiated shipping order. When you create a rent order, the begin datetime will be one of the following, depending of the selected value :
>
> - `Today` : The date will be today, and the time will be either the `Day begin`, if you create the rent order before the time specified in `Day begin`. If you are between the `Day begin` time and the `Afternoon begin` time, the rent order will be started at the specified in `Afternoon begin`. If you are after the `Afternoon begin` time, it will be created at the current time + 1 hour.
>
> - `Tomorrow (Morning)` : The rent order begin datetime will be tomorrow at the `Day begin` time.
>
> - `Tomorrow (Afternoon)` : The rent order begin datetime will be tomorrow at the `Day afternoon` time.
>
> - `Empty` : No default value, you must fill it manually.

2.2 Products configuration

Once you have done the global configuration to fit your company needs, you have toconfigure your products. Go to `Sales->Products->Products` and create or select and existing product. First of all, if you want to rent a product, you must check the `Can be rented` checkbox in the `Characteristics` group (top right).

If you want your product to bo sold only once with a rent order as a service, like *Installation* or *Configuration*, just check the `Can be sold` checkbox and mark the product as a `Service` in `Product type`.

2.2.1 Product types

OpenERP Rent let your rent different products : *Service* products and *Stockable (or Consumable)* products. *Services* product won't generate a out/in shipping order, whereas *Stockable* products will.

Their is also a difference in the workflow : a *Service*-only rent order will start automatically at the rent order begin datetime, whereas a *Stockable* product will start when the products have been shipped to the client.

If you mix both *Service* and *Stockable* products in a rent order, it will start with the shipping of the products.

2.2.2 Product rent price

When you check the `Can be rented` wheckbox, you can (and must) define a rent price. You can express the price in the unity of your choice (`Day`, `Month`, `Year`). This price will be converted automatically in the rent order.

For example, if a product costs 15€ per month, and you rent it for 15 days, the customer will pay 7,5€. Because it's complicated to convert unities based on duration, OpenERP Rent uses the following factors to do the convertion :

- 1 Month = 30 Days
- 1 Year = 12 Months, or 360 Days

Go to `Sales->Configuration->Product->Units of Measure->Units of Measure` to configure these factors to fit your needs.

User guide

You can create and manage your rent orders the same you do with sale orders. Go to `Sales->Sales->Rent Orders` to list/create/delete your rent orders.

3.1 Create a Rent Order

The rent order view is similar to the sale order view except for few fields specifics to renting :

- `Rent begin date` : Defines the datetime at wich this rent order will start. In the case of a rent order with only stockable products, this field is only informative, because the rent order will start once all products have been shipped.
- `Duration / Duration unity` : Defines the duration of the rent order. It's pretty obvious.
- `Shipping Date` : Defines the date of delivery of products. It can't be after or before the rent begin date. This field is ignored in case of a service-only rent order.
- `Return Date` : Defines a specific return date for products. By default, it's the rent order end date. This field is ignored in case of a service-only rent order.
- `Invoice period` : Defines how to invoice the customer. For example, if you select a *Monthly* period, an invoice will be generated every month during the rent duration. For short rent order (less than a month), you can use the *Once* period which generates only once invoice.

> **Warning:** You can't use a `Day` duration with a `Monthly` invoicing period. Currently, if you want to invoice monthly, you must use a `Month` or `Year` duration unity.

> **Note:** Invoices are generated automatically into a *cron job*. By default, this cron is called once per day. Go to `Administration->Scheduler->Scheduled Ations->Rent - Invoices Cron` to change this.

3.2 Add products

When you add a product to a rent order, there are some options you must be aware of :

- `Type of product` : This is **not** the same that the product's type (*service*, *stockable* or *consumable*). It defines if the product will be invoiced only once (*Service*), or if it will be rented and invoiced multiple time (*Rent*). For example, if you want to invoice a product named *Installation* only once, you should choose *Service*.

However, if you want to rent a service product (defined as *Service* in its product view) like *web hosting*, you must set this field to *Rent*, because you will invoice it monthly !

- `Product Unit Price` : This field defines the price of the product.
    - In the case of a `Rent` product, it defines its price, expressed in the unity defined for the product price in the product view. For example, if you defined that a product costs 15€/Day, this field will contain `15` by default, no matter what unity you choosed for the rent order duration.
    - In the case of a `Service` product invoiced once, it defines its sale price. Filled with the product's sale price by default.

Note: When you select a product, fields are automatically filled with default values. You shouldn't have to change them.

3.3 Handle the workflow

There are two cases with rent orders : the rent order is a *service*-only rent order (no shipping), or not.

3.3.1 Services only rent orders

These rent orders will be started by a *cron job* or when you click on `Starts the rent order manually`. When the rent order is started, you can see its state is *Ongoing*. A service-only rent order is automatically stopped when the end date is reached, or when you click on `Stops the rent order manually`.

Warning: A stopped rent order can't be started again !

3.3.2 Deliverable rent orders

If you rent order contains one or more *stockable/consumable* products, it won't be started automatically. It will be started when the products will be shipped. You must validate the *delivery order* to starts the rent order.

You can access the delivery order associated to your rent order by clicking on the `Delivery Order` button on the right pane.

When you validate the delivery order, an incoming shipment is automatically created, dated of the rent order *return date*. To stop your rent order, you will have to validate this incoming shipment.

You can acess it using the `Incoming Shipment` button on the right pane.

Contribute to OpenERP Rent

This module is an open-source project and we need contributors to make it better ! You contribute in different ways.

4.1 Translate OpenERP Rent

Because it's not easy to translate extra modules, we choosed to host our project on Transifex. Subscribe and join our project-page. You must join a translation team to be able to translate.

If the team doesn't exist yet, contact me.

The translation should be integrated into the next version, but you can download the `.po` file manually to enable it on you current version.

4.2 Make bug reports

If you encounter bugs, you must report them. This is done easily on the github project page.

4.3 Improve the code

If you are a developper, just fork the project on github and send me a pull request with your modifications. If you are not sure, or have questions, send me a private message on github or open an new issue.