

## inspHire OnRent Factsheet

### Technical Architecture

#### Server

- Restful API build with MS WebAPI using .NET 4.6
- Data access layer (Entity Framework) Repository Layer (LINQ-to-Entities)
- Business Services Layer (Services, Models, Validators)
- Restful API (Controllers , Factories, DTO's)
- Authentication using OAuth2.0
- Multi-tenant SAAS Architecture
- IIS 7.5 or later

#### Client

- Single Page Application built using Ember (2.18)
- SPA framework (Routes, Models, Controllers, Templates, Components and Services)
- Based on MVVM pattern
- Responsive application (using Bootstrap)
- Cross-browser (support for modern browsers + IE11 and above)
- Open Source

### Administration

System Setup, is the administration area to configure the application, areas of the system setup include;

- Users – add users to the application.
- Roles – Create bespoke roles for users for security and specific access purposes.
- Custom Views – create bespoke views for reporting and real time data.
- Custom Field Groups – create custom field groups to assign to areas of the system.
- Custom Fields – create custom fields for custom forms.
- Custom Form Groups – create custom form groups to assign to areas of the system.
- Custom Forms – customise the system with custom field and custom form designs.
- List of Values - creation and maintenance of Reasons or Criteria used throughout the system.
- Document templates – create bespoke documentation, upload logos and change colours on document templates or change/create documents using HTML & CSS.
- Password Policies – use password policies to set compulsory expiry dates and password lengths for users.
- Companies – create multiple companies in the system.
- Countries – use multi country for depots or customers.
- Regions – Create collections of depots to assign regions to users.
- Depots - creation and maintenance of separate individual locations that equipment, activities and orders can be recorded against.
- Places – this is the system address book.
- Product Groups – these are folders for products.

- Surcharge Groups – create surcharge groups for rental orders to specify the types of surcharges that apply.
- Surcharges - creation and maintenance of supplementary charges.
- Document Numbers – configure document numbers.
- Maintenance Types – create bespoke maintenance types for servicing and safety checks.
- Tax Classes - classify products or customers with bespoke tax classes.
- Tax Rates – calculate Tax charges on an invoice.
- Tax Rules creation and maintenance of VAT/Tax codes used throughout the system
- General Ledger Templates – create a GL template for General Ledger Postings.
- Revenue Groups – categorise income using revenue groups.
- Payment Terms - creation and maintenance of payment terms.
- Currencies - creation and maintenance of foreign currencies with an exchange rate for use with customers that are invoiced in a different currency.
- Currency Tables – used with multi-currency for setup.
- Exchange Rate Groups – group currency exchange rates.
- Rate Definitions - customisable rate engine creation tool for rental charging.
- Invoice Run Codes
- Import data using CSV for the mass creation and updating of the following areas:
  - Account
  - Contact
  - Place
  - Product
  - Product Accessory
  - Product Group
  - Product Rate
  - Product Stock Level
  - Service
  - Service Rate
- Export Data – export feature to export data, with ability to import and update it.
- System Events – records system transactions for security and easily tracking actions in the application.
- Active Sessions – active sessions show which user are currently active in the system.
- Erase Data - delete the data en masse. It is possible to delete the following:
  - Invoices
  - Rental Orders
  - Unavailable Items
  - Product Stock Levels
  - Products
  - Services
  - Product Groups
  - Activities
  - Projects
  - Accounts
  - Places
  - Contacts

## Rental Orders

Allows the creation and maintenance of quotations/provisional orders and orders for Account customers or Cash customers. Supporting:

- The rental of stock items.
- Sale of items.
- Accessories of items with up to 6 tiers of accessories (an accessory of an accessory).
- Add Non-Stock as Delivery and Collection charges.
- Items with differing date ranges (single date range per rental order item record).
- Supplementary charges (Surcharges).
- Multiple staging processes with supporting documentation. Rental Agreement, Delivery Note, Off Rent Returns Note, Credit note or Invoice.
- Stock availability checks and warnings.
- System options to not allow overbooking of stock levels.
- Ability to add additional customised document templates for use with the Rental screens.
- Automatic document numbering in sequential order.
- Automated document recording of Delivery>Returns on Movements screen.
- Customer specific rates/charging.
- Advanced invoicing.
- Ability to add products of items for later warehouse picking and allocation.
- Add an account address, delivery address and alternative collection address.
- Audit trail of actions performed against the order.
- Grouping of orders for automated invoicing when desired. (Invoice Run Codes)
- Discount percentages against items.
- Able to apply insurance charges, (surcharges).
- Suspend charging for the Company, Depot, Place, Account, order or on an item by item basis for specified date ranges (Generally used for festive seasons or national holidays).
- Un-allocate an order reverting to a quote.
- Does not allow the creation of orders for accounts on hold/stop.
- Apply Nominal/General Ledger codes at rental order item level.
- Attaching of documents to an order
- Auto Suggest searching for Customers, Addresses (With Google Places), Products, Items & Resources
- Item images can be shown in the dropdown auto suggest.
- Configurable rate charging
- Use Projects to track groups of Rental Orders
- Use Activities and the Calendar to follow up Quotes and Meeting
- Signature Capture – Capture Signatures against Delivery Notes and Return Notes to record receipt of goods.

## Invoicing

- Invoice Run feature enables a user to run month end and print batch invoices
- Allows for mass invoice generation;
- Invoice creation and posting process to Sage Business Cloud
- Ability to manually create an invoice and interlink this to an order
- Credit note creation with the facility to copy from an existing invoice.
- Ability to manually adjust an invoice, adding item charges, removing them and adjusting existing.
- Emailing of invoices

## Stock

Supports a multi-tier stock structure for asset and stock control supporting;

- Manual stock record creation and maintenance.
- Sales items, rental items, serialised and bulk items, automatically maintaining current stock levels of each via rental or sale.
- Non-stock items, where the item does not physically exist but needs to be treated as an item for recording/charging; e.g. a cleaning charge or setup/installation fee.
- Mass import/update for stock level record, product or product group, stock level accessories and stock level creation with the use of csv spreadsheets using an import routine.
- Setting of default prices/rates, customer or depot specific rates against a product.
- Multiple depot stock quantity records.
- Recording an image of an item that can be shown within the system
- Attaching of documentation/files against a stock level
- Recording of suppliers and default costs on a record-by-record or group basis.
- Recording of order accessories against a product which can be set as optional or mandatory and are displayed when adding that item or product to an order.
- Setting of default general ledger templates against an item or product for revenue
- Recording of dimension (Height, Width and Depth) and weight.
- Recording of an insurable value.
- Ability to quarantine damaged, in-service, in-repair and lost items
- Multiple maintenance types against an item for various service types, each with different intervals for tracking and updating of when services are required. These can be updated individually.
- Set an item as not being allowed to have a discount and/or suspension of rental charges applied against it.
- Automatic recording of Stock Level transactions, selling, or writing off equipment.
- Multiple screens showing stock, current stock levels, future/planned stock use at Product level.

## Stock Visibility

Supplied are a suite of screens and functions to assist with the visibility and maintenance of stock;

- Stock Views: Listing all stock in a hierarchical structure, current status, stock levels, orders, invoices and unavailable status.
- Maintenance Due: Shows all equipment due for scheduled maintenance, with ability to book into maintenance from this screen.
- Availability: - Displays the availability by product in table format for items within a selected product group; allows changing of dates, depot and type within the screen for ease of stock planning, ability to drill into for accurate analysis.

## Customers

Supporting direct integration to a supported account's solution for populating Sales ledger account details into the inspHire Product for use therein.

- Sales ledger accounts: Display top level account information. Ability to create orders, and invoices against an account. Record notes, activities and documents and maintain a list of contacts. It is possible to specify account specific settings including default invoice run codes, email address to send invoices, delivery addresses and custom values.
- Cash customers: Ability to create cash customers, it is possible to create a custom view to see cash customers.
- Creation and maintenance of delivery addresses that can be generic or customer specific.

## Reporting

Customisable reports by Selection Criteria with the ability to export to CSV or Excel.

- A suite of standard system reports provided with the system.
- Custom view dashboard for bespoke views and reporting that can be customised. Views can be restricted to specific users or roles and appear at login on the dashboard for a reminder/work list(s). It is also possible to set a daily email reminder.