

RentalFlow – User Guide

Equipment and asset rental management for SAP Business One

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What RentalFlow does

RentalFlow is CSC-WORK's equipment and asset rental product for SAP Business One.

Early release (October 2026): this release delivers the RentalFlow platform:

- sign-in and users,
- the SAP connection,
- rental **locations** imported from your SAP warehouses,
- branding, email and billing.

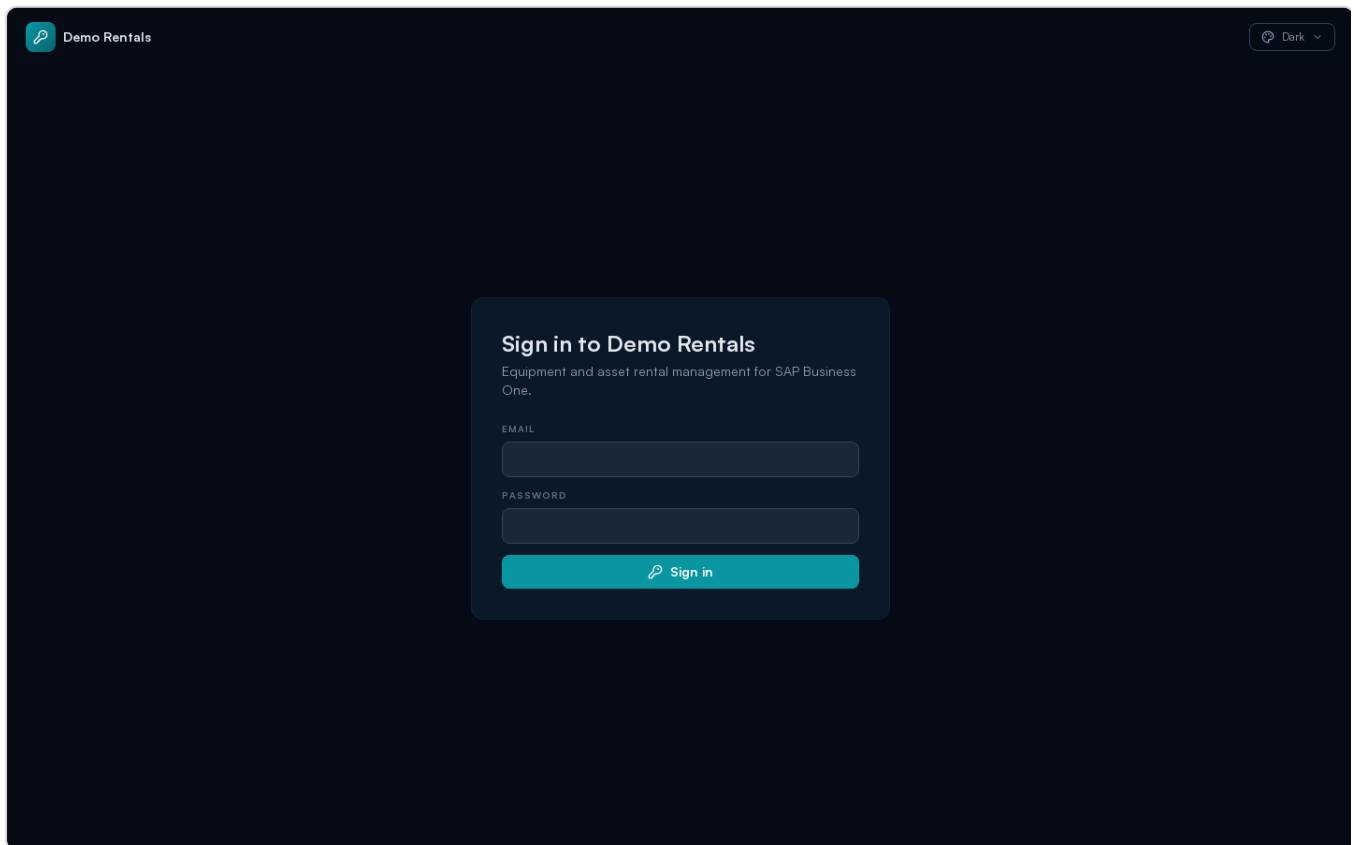
The rental screens (equipment, reservations, contracts, inspections and rental invoicing) are coming in later releases. The email templates for those documents are already in place, so you can prepare your wording now.

Until an SAP company is connected, RentalFlow shows **demo data**, clearly labelled *demo*.

Roles

Role	Can do
Admin	Everything, including Setup
Manager	Runs the rental desk; can edit customer email templates
Viewer	Read-only

Signing in

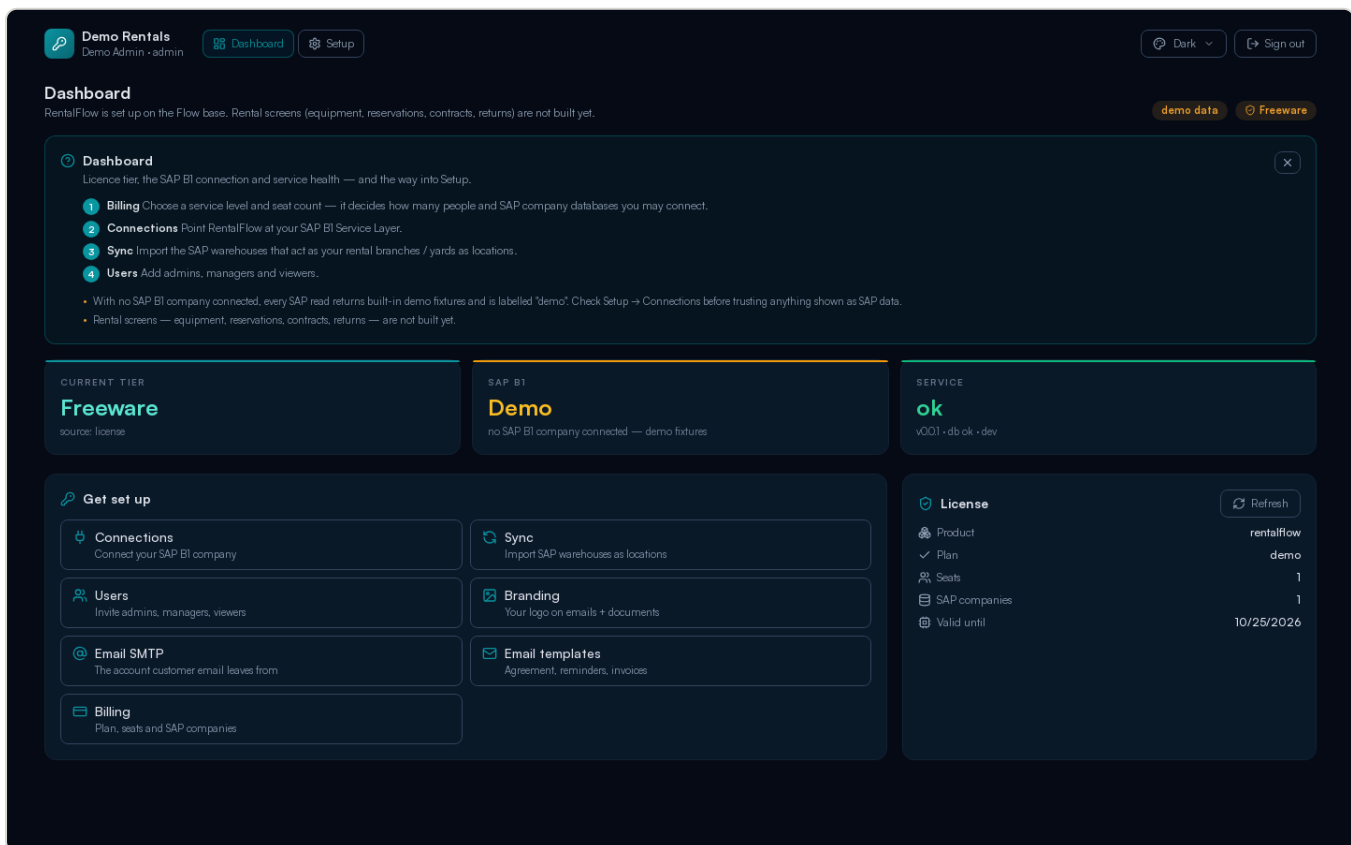


The screenshot shows a dark-themed web application interface. In the top left corner, there is a logo with a teal icon and the text "Demo Rentals". In the top right corner, there is a "Dark" theme toggle button. The main content area is a dark blue rectangle. Centered within this area is a lighter blue rounded rectangle containing the sign-in form. The form has the title "Sign in to Demo Rentals" and a subtitle "Equipment and asset rental management for SAP Business One." Below the subtitle are two input fields: "EMAIL" and "PASSWORD". At the bottom of the form is a teal "Sign in" button with a small icon to its left.

SIGN IN TO RENTALFLOW.

Sign in with your email and password. The first time, you set your own password.

The dashboard



RENTALFLOW DASHBOARD.

The dashboard shows:

- your **tier**, your **SAP B1** connection status, and service health;
- the **License** card: product, plan, seats, SAP companies and *valid until* date, with **Refresh**;
- **Get set up** shortcuts (admins and managers). These go straight to each Setup step: Connections, Sync, Users, Branding, Email SMTP, Email templates and Billing.

A **demo data** badge means no SAP company is connected yet. Click it to go to Connections.

Setting up RentalFlow

Follow the **Setup & Administration Guide** for the standard tabs. In RentalFlow the order is:

1. **Billing:** choose your plan (Starter, Mid-Market or Enterprise), seats and B1 companies.
2. **Connections:** add your SAP company and click **Test**.
3. **Sync:** import warehouses as **locations** (see below).
4. **Users:** add admins, managers and viewers.
5. **Branding, Email SMTP and Email templates.**

Sync: SAP warehouses → rental locations

Sync

SAP master data demo data Refresh

RentalFlow does not pull any transactional data from SAP BI yet. The only thing that comes across today is warehouses, imported as rental locations — and only when you press the import button below. There is no automatic sync schedule.

Company: None connected — Setup → Connections

Mode: demo

Warehouses → Locations: never

Warehouses → Locations demo data Import as locations

SAP warehouses (OWHS) become RentalFlow locations — the branches and yards equipment is rented out of and returned to. Re-importing an existing warehouse refreshes its name.

CODE	NAME	STATUS
01	Main yard	not imported
02	North branch	not imported
03	South branch	not imported
RPR	Repair shop	not imported

SETUP → SYNC.

Your branches and yards are SAP warehouses. To make them rental locations:

1. Open **Setup → Sync**. The panel shows the company, whether you are in *demo* or *live* mode, and when the last import ran.
2. Click **Refresh** to read the warehouse list from SAP.
3. Tick the warehouses to bring in. Each one shows *location* (already imported) or *not imported*.
4. Click **Import N as location(s)**.

Imports run only when you click; there is no automatic schedule.

Email templates

Demo Rentals
Demo Admin · admin

Dashboard Setup

Connections
SAP BI Service Layer wiring

Sync
SAP warehouses → rental locations

Users
Admins, managers and viewers

Branding
Company logo on documents + emails

Email SMTP
Scheduled + system email sender

Email templates
Per-document subject + body wording

Billing
License, card, purchase seats

Support
File a support ticket with your vendor

EMAIL TEMPLATES

Email templates
One template per customer document, company-wide — rental agreement, pickup / delivery scheduled, return reminder, overdue notice, inspection report and rental invoice. Nothing is sent automatically yet; this is the wording RentalFlow will use once rental workflows exist. Rows marked **Default** are the built-in wording; edit any to override it, or revert to the default.

EMAIL	SUBJECT	SOURCE	ACTIONS
Rental agreement / reservation confirmation	Your rental with {tenant_name} is confirmed — {contract_ref}	Default	Edit
Pickup / delivery scheduled	Equipment handover scheduled for {handover_date} — {contract_ref}	Default	Edit
Return reminder	Reminder: {equipment} is due back on {end_date}	Default	Edit
Overdue notice	Overdue: rental {contract_ref} was due back on {end_date}	Default	Edit
Damage / inspection report	Return inspection report — {contract_ref}	Default	Edit
Rental invoice	Invoice {invoice_ref} from {tenant_name} — rental {contract_ref}	Default	Edit

SETUP → EMAIL TEMPLATES.

RentalFlow has templates ready for:

- Rental agreement / reservation confirmation
- Pickup / delivery scheduled
- Return reminder
- Overdue notice
- Damage / inspection report
- Rental invoice

Edit the wording now and check it with **Preview with sample data**. These emails start sending when the matching rental screens are released.