These 12 steps mirror the physical steps you have to go through to get a piece of equipment onto a truck, deliver it to a job site and then manage the return as well as the back office steps that need to occur like charging, damage and off-rent inspections. The advantage of going paperless and utilizing the mobile apps and the Job Site Portal is that every step is improves efficiency and reduces costs.

Step 1: Create Requisition in Job Site Portal:

Site engineers can browse a list of equipment, select what they need, then add key information, like delivery times or project allocation.

Step 2: Schedule the Requisition for Fulfillment:

Once the requisition is saved (and approved if you set up approvers) the request shows at the main branch control center and an alert can be sent. There you can choose to create a new order, add to an existing order, or group multiple requisitions together.

Step 3: Managing Where to Get the Equipment:

If the equipment is coming from your own available fleet, proceed to the fulfilment step 5 below. If you haven't got available equipment, you can arrange a transfer from another branch at this step. Or lastly, if you need to rent externally you can create a purchase option to create a sub-rent PO with drop ship instructions that you can electronically send to your vendor.

Step 4: Tracking the Order Progress:

As you perform each step of the process all information is visible on a screen back in your main branch location as well as at the job site via the portal for your teams on site. If you have external customers they can also access the job site portal and see what you have awaiting delivery to their job sites.

Step 5: Filling the Order via Mobile:

Mobile apps allow you to record the physical selection of equipment in the yard, warehouse or stock rooms. The app allows you to assign pick lists to individuals or teams and as they pick equipment or load it onto trucks every action automatically updates the system. Once they're finished they can simply confirm they are done and it is ready to be staged for shipment.

Step 6: Staging the Order for Dispatch:

Once the order is confirmed you can start planning your transportation logistics. You can determine the number of trucks, split your orders across multiple trucks, load more than one order onto a truck, or define separate journeys, whatever is appropriate. All through a simple drag and drop interface with no need for double entry. The system simply feeds orders and picking data to your screen as other users update their parts of the process.

Step 7: Confirm Load and Receipt through Mobile Technology:

We've got 2 apps to help with this part of the process, the first is to allow your truck driver to confirm the contents of his load, and flag that the equipment is in transit. Then at the delivery site the second app captures signature at the job site confirming what equipment was delivered and recording the date and time.

Step 8: Charging the Job Site:

Once all you equipment is on site you can create invoices or simply pass on the internal costs for accounting purposes. The charges can be sent electronically or posted directly into your corporate financials (Oracle, SAP, JD Edwards, etc). You can also create accrual information by project code, task and job site.

Step 9: Requesting a Collection from Job Site Portal:

When the equipment is ready to be returned, a quick request through the job site portal tells your team to start the reverse process to bring the equipment back to your central yard or return to the rental branch. You can also program the pick-up requests for a date in the future.

Step 10: Staging the Collection for Return:

Just as with Step 6 your pickup document is a trigger for the staging process. You can assign it to trucks and then watch the progress of the pickup from the data coming back from your mobile apps.

Step 11: Confirming Collection through Mobile Technology:

As a final verification, when the truck drivers picks the equipment up from the job site, you can get a signature from the customer to confirm the pick-up date and time. The driver can then visibly check for any damage and record it via their mobile device which sends it back to the job site portal.

Step 12: Final Invoicing, Damage Charges and Inspection:

As soon as you confirm the off-rent, the system will auto generate an off-rent inspection on a mobile device. You can pass on any damage charges to your job site and auto bill any outstanding charges back to the job site.