

Rental

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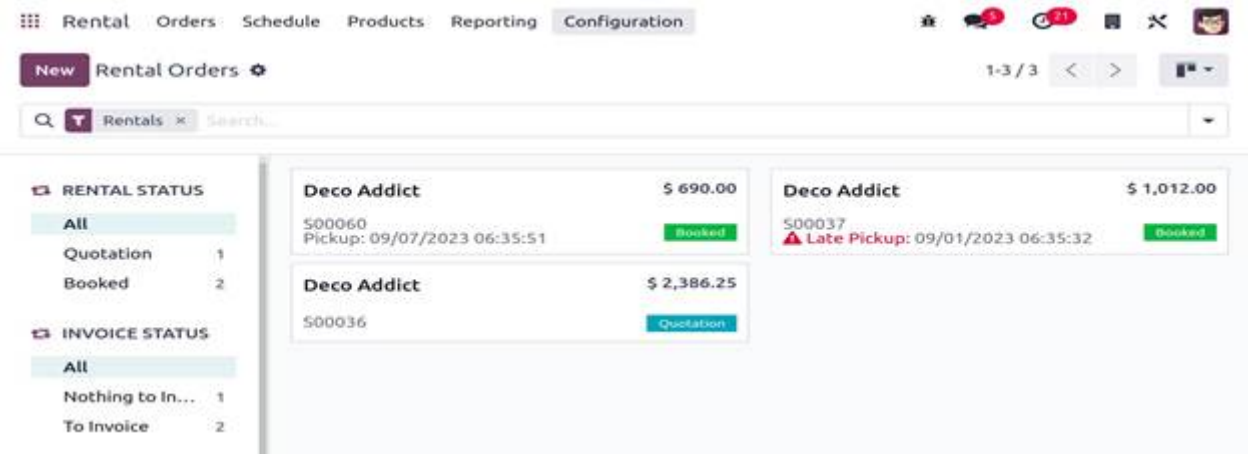
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Rental

We offer rentals for medium- and small-scale businesses under the business programs, so you shouldn't waste your time purchasing the supplies required to oversee and manage the activities. There's a good chance you'll need to provide a number of the items for the activities. It will be less costly if you just rent them. The demand for rental items is rising in the modern era. You can focus only on these rental techniques whether it's for furniture, car parts, party wear, or other grant-related events. The Odoo17 software's rental module makes renting a somewhat easy process to accomplish.

The Rental module assists you with all tasks necessary for rental operations. The rental module offers tools for producing rental quotations, managing rental orders, creating invoices and payments, as well as looking for rental-eligible products. This is how the rental module's page will look, as seen in the illustration below.



You will learn more about the already-made rental products and the person in charge of them. The Kanban view of the page displays the Rental status and Invoice status on the left side of the screen. The quotation, confirmed, picked up, and many other rental statuses are included.

Kanban, List, Pivot, Calendar, Activity, and Graph views of the page are also available. Simply select the New symbol to place a new rental order. You will be presented with the page below after choosing the **New** option to create a new rental.

New

Customer [?]

Invoice Address [?]

Delivery Address [?]

Quotation Template [?]

Expiration [?] 10/06/2023

Quotation Date [?] 09/06/2023 11:15:08

Recurrence [?]

Pricelist [?]

Payment Terms [?]

Product	Description	Quan...	UoM	Unit P...	Taxes	Disc.%	Tax excl.
Add a product	Add a section	Add a note	Catalog				

You can see a spot to enter the Customer's name, Referral source, Invoice Address, Delivery Address, Expiration date, Recurrence, Pricelist, and Payment Terms on the creation page.

The **Quotation template** is now available in Odoo 17 Rental Orders. There are some tabs that you can fill out, including **Order lines**, **Optional Products**, **Other Info**, and **Notes**. You will see a list of products, a description of the product, the quantity of the product, the unit price, taxes, the amount of the discount, and the subtotal under the Order Lines option. You may simply add a new product to the provided list by selecting the **Add a line** option. Now, when you choose a specific item from the list provided, a new window like the one below will appear.

Payment Terms [?]

Product	Description	Quan...	UoM	Unit P...	Taxes	Disc.%	Tax excl.
[RENT003] Printer (R...	[RENT003] Printer 09/06/2023 08:00:00 to 09/07/2023 08:00:00	1.00	Units	20.00	15%	0.00	\$ 20.00

[Add a product](#) [Add a section](#) [Add a note](#) [Catalog](#)

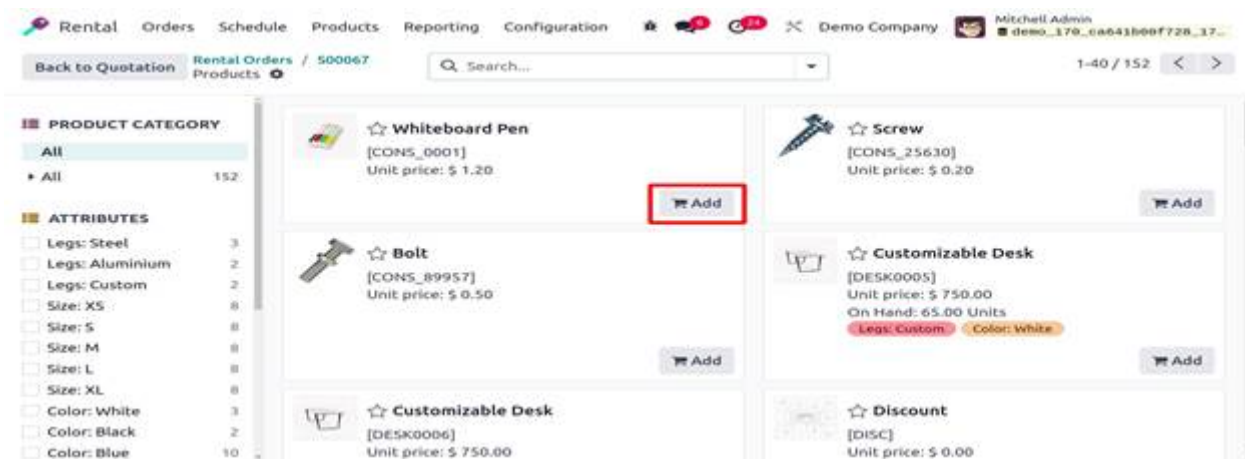
Terms & Conditions: <https://demo8.odoo.com/terms>

[Add shipping](#)

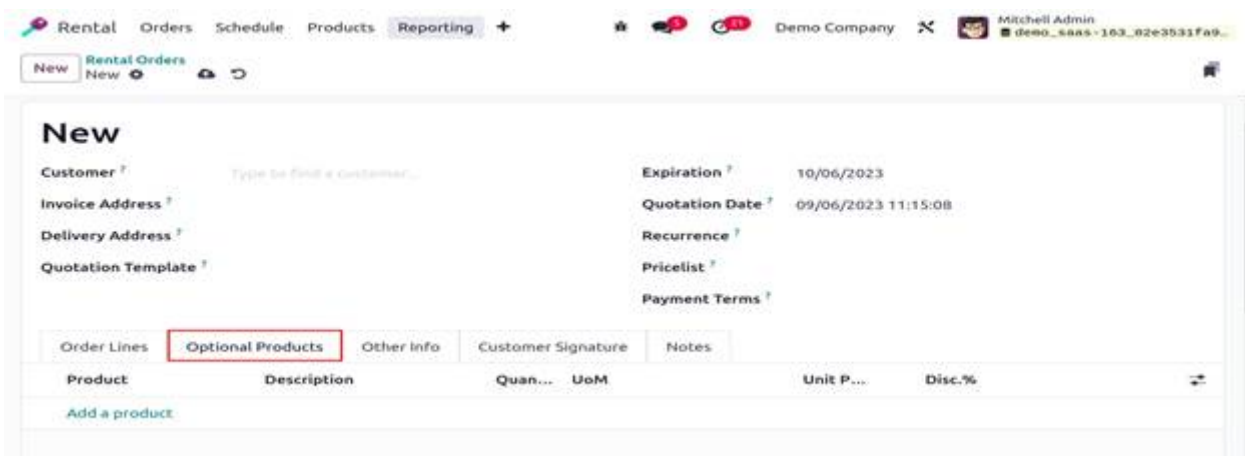
Untaxed Amount: \$ 20.00
Tax 15%: \$ 3.00
Total: \$ 23.00

You will obtain all of the total rent costs after adding the additional item to the list. The remaining procedures are identical to those in the sales order.

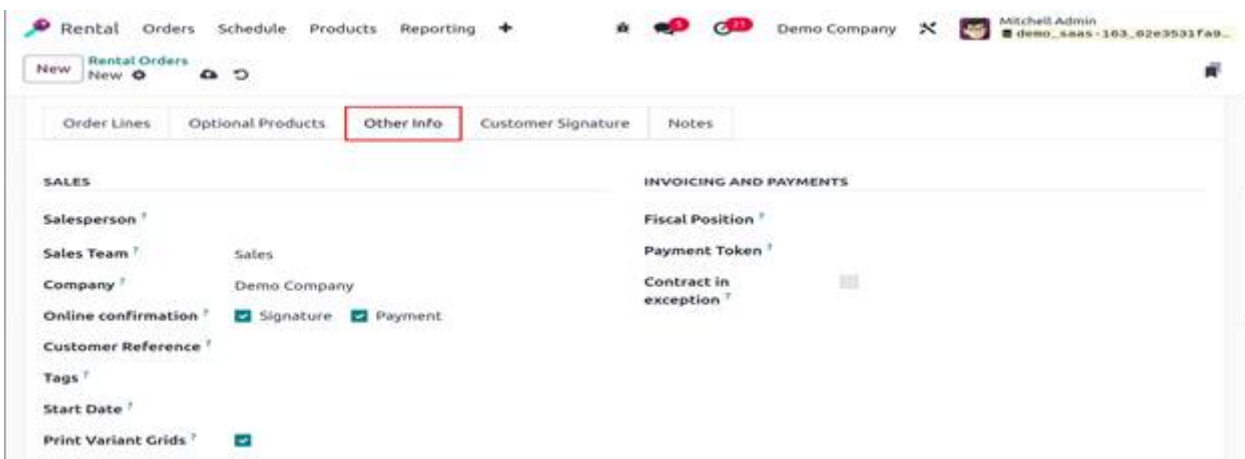
The **Product Catalog** page can be accessed using the Orderline's **Catalog** option. The page has categories for each of the product categories and attributes in order for users to choose things from there with ease.



You have options like Product, Description, Quantity, Unit Pricing, Discount, and many more under the **Optional Products** option.



Using the Add a line option, you can add a new one, as you did previously.



The **Other Info** tab is the next one, and it contains choices for sales, invoicing and payment, deliveries, and tracking. You can specify the **Salesperson**, **Sales Team**, **Company** name, **Online payment** and **signature** confirmations, **Customer Reference**, associated **Tags**, and **Start Date** under the SALES section. You can enter the **Fiscal Position** and **Analytical Account** under the INVOICING AND PAYMENTS section. You can now specify the **Shipping Policy** and **Delivery Date** beneath the DELIVERY option.

The screenshot shows the 'Rental Orders' form with the 'DELIVERY' and 'TRACKING' tabs highlighted. The 'DELIVERY' tab contains fields for Shipping Weight (0.00), Shipping Policy (As soon as possible), and Delivery Date (Expected: 09/06/2023 11:25:27). The 'TRACKING' tab contains fields for Source Document, Opportunity, Campaign, Medium, and Source.

Finally, you have the **TRACKING** option, where you may specify the campaign, medium, source, and source document, respectively.

You can include some internal remarks about the rental goods under the **Notes** tab.

The screenshot shows the 'Rental Orders' form with the 'Notes' tab highlighted. The 'Notes' tab contains a text area for internal notes.

You can access the save icon once you have entered all the essential information. Following that, the created quotation order can be sent through email, as displayed below.

The screenshot shows the 'Rental Orders' form with the 'Send by Email' button highlighted. The form displays the following details:

- Customer:** New Customers
- Invoice Address:** New Customers
- Delivery Address:** New Customers
- Quotation Template:**
- Expiration:** 12/20/2023
- Quotation Date:** 11/20/2023 09:48:28
- Recurring Plan:**
- Price List:** Beneflux (USD)
- Payment Terms:**
- Rental period:** 11/20/2023 10:30:00 → 11/21/2023 10:30:00
- Duration:** 1 day

The form also includes a table for Order Lines:

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc. %	Tax excl.
[RENT003] Printer (Rental)	[RENT003] Printer (Rental) 11/20/2023 06:00:00 to 11/21/2023 06:00:00	1.00	Units	20.00	13%	0.00	\$ 20.00

You can quickly access the **Confirm** option after receiving a specific customer's confirmation, as illustrated in the above image. You will see the page, as in the screenshot below after confirming the rental item.

Rental Orders Schedule Products Reporting Configuration

New Rental Orders 500084

Delivery 2

Create Invoice Pickup Send by Email Preview Cancel Sign Documents Quotation Quotation Sent Sales Order

S00084 Booked

Customer: Deco Addict
77 Santa Barbara Rd
Pleasant Hill CA 94523
United States - US12345673

Referrer:

Invoice Address: Deco Addict

Delivery Address: Deco Addict

Quotation Template:

Order Date: 11/20/2023 10:45:30

Recurring Plan:

Pricelist: Default USD pricelist (USD)

Payment Terms: 30 Days

Rental period: 11/20/2023 11:30:00 → 11/21/2023 11:30:00

Duration: 1 day

Order Lines Other Info Customer Signature Notes

Product	Description	Quantity	Delivered	Returned	Invoiced	UoM	Unit Price	Taxes	Disc. %	Tax excl.
II	Coffee Machine (Rental)									

After confirming the delivery, a smart tab named **Delivery**, which shows that two delivery transfers were created there. Here, we can see one is in the Ready stage, and the second is Waiting for another operation.

Rental Orders Schedule Products Reporting Configuration

New Rental Orders / 500084 Transfers

Search...

1-2/2

Reference	Contact	Scheduled Date	Source Document	Batch Transfer	Company	Status
WH/OUT/00033	Deco Addict	Today	S00084		My Company (San Francisco)	Ready
WH/IN/00012	Deco Addict	Tomorrow	S00084		My Company (San Francisco)	Waiting Another Operation

The first one is a Delivery to the Customer. Validate the delivery to complete the order.

Rental Orders Schedule Products Reporting Configuration

New 500084 / Transfers WH/OUT/00033

Operations

Validate Print Print Labels Cancel Draft Waiting Ready Done

WH/OUT/00033

Delivery Address: Deco Addict

Scheduled Date: 11/20/2023 11:30:00

Deadline: 11/20/2023 11:30:00

Product Availability: Available

Source Document: S00084

Operations Additional Info Note

Product	Demand	Reserved	Quantity	Unit
Coffee Machine	1.00	Available	1.00	Units

Add a line

After completing the delivery, the second transfer changed to the Ready stage. The Scheduled date is tomorrow, which means that it is to pick up the product from the customer.

Rental Orders Schedule Products Reporting Configuration My Company (San Francisco) Mitchell Admin 53949654-master-all							
New Rental Orders / S00084 Transfers Search... 1-2 / 2							
Reference	Contact	Scheduled Date	Source Document	Batch Transfer	Company	Status	
☐	☐	WH/OUT/00033	Deco Addict	S00084	My Company (San Francisco)	Done	
☐	☐	WH/IN/00012	Deco Addict	Tomorrow	S00084	Ready	

The status will then be changed to **Picked-up**, indicating that the specific order has been delivered to the specific customer.

Rental Orders Schedule Products Reporting Configuration

My Company (San Francisco) Mitchell Admin 53949654-master-all

New Rental Orders S00084

Delivery

1 / 8

Create Invoice Return Send by Email Preview Cancel Sign Documents

Quotation Quotation Sent Sales Order

S00084

Customer Referrer Invoice Address Delivery Address Quotation Template

Order Date Recurring Plan Pricelist Payment Terms Rental period Duration

Order Lines Other Info Customer Signature Notes

Product	Description	Quantity	Delivered	Returned	Invoiced	UoM	Unit Price	Taxes	Disc. %	Tax excl.
II	Coffee Machine (Rental)									

Picked-up

As indicated in the image above, the page now displays the confirmed status on the right side. Customers can create invoices for a specific product using the **Create Invoice** option. The payment can then be readily registered using these prepared invoices.

After the rental period has expired, returning the rented item can be done by choosing the **Return** option. When you do this, the status will read "Returned."

Rental Orders Schedule Products Reporting Configuration

My Company (San Francisco) Mitchell Admin 54435709-master-all

New Rental Orders S00023

7 / 9

Create Invoice Send by Email Preview Cancel Sign Documents

Quotation Quotation Sent Sales Order

S00023

Customer Referrer Invoice Address Delivery Address Quotation Template

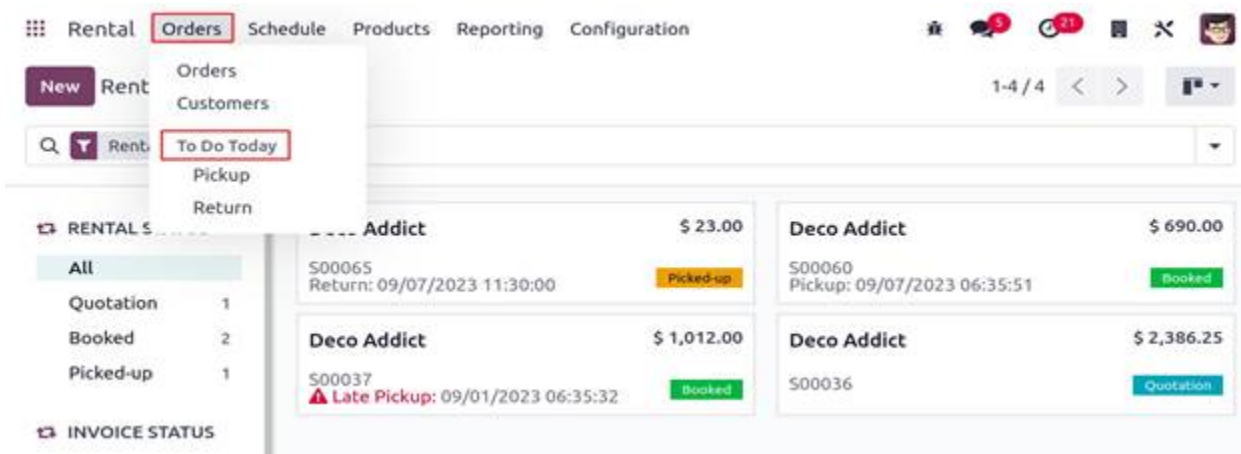
Order Date Recurring Plan Pricelist Payment Terms Type de chantier Rental period Duration

Order Lines Other Info Customer Signature Notes

Product	Descr...	Quan...	Deliv...	Retur...	Invoiced	UoM	Packa...	Packa...	Unit P...	Taxes	Disc. %	Tax
---------	----------	---------	----------	----------	----------	-----	----------	----------	-----------	-------	---------	-----

Returned

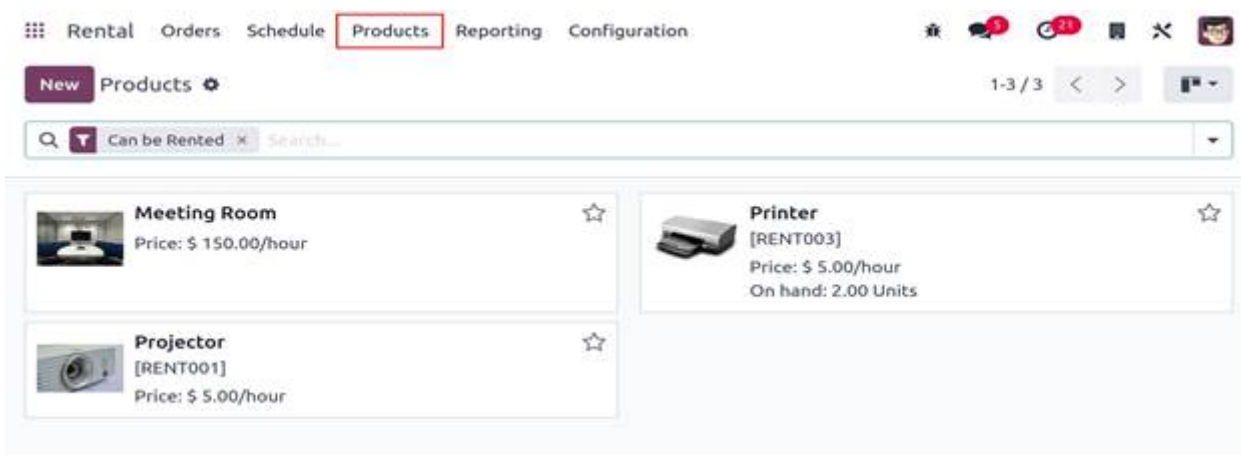
Returning to the rental module's home page, you will see the **Orders menu**, where you have the **ToDo** option, as shown below.



Under the orders menu, you have the To Do Today option, which has two sub-options, including **Return** and **Pickup**. You can find information about the product that has to be picked up on the pickup page, and the return option lists items that have been returned after the product's rental time.

Rental Products

In the rental module, creating new rental products is simple. Configuring products is comparable to the process of generating a rental product. You should always remember to check the box labeled "Can be rented" in the Configuration window when adding a new product. The main page itself contains a link to the **Product** menu.



You can view many things that are kept for rental on the page. Along with the product's name and price, it also gives the product's description. You can use the New icon, as seen in the screenshot, to create a product of a similar type.

Product Name [?]

☐ Can be Sold [?]
☐ Can be Purchased [?]
☐ Can be Expensed [?]
☐ Recurring [?]
☒ Can be Rented [?]

[Update Quantity](#)
[Replenish](#)
[Print Labels](#)

[General Information](#)
[Attributes & Variants](#)
[Sales](#)
[Time-based pricing](#)
[Inventory](#)
[Accounting](#)

Product Type [?] Storable Product
Invoicing Policy [?] Ordered quantities
Create on Order [?] Nothing
Storable products are physical items for which you manage the inventory level.
You can invoice them before they are delivered.
Unit of Measure [?] Units
Purchase UoM [?] Units

Sales Price [?] \$1.00 (= \$ 1.15 incl. Taxes)
Customer Taxes [?] 15%
Cost [?] 0.00 per Units
Product Category [?] All
Internal Reference [?]
Barcode [?]
Product Tags [?]
Company [?]

There are a lot of details you can upload on the creation page. In the fields provided, you can enter the product's name and an image of that particular product. Now that the product may be sold, bought, expended, recurring, and rented by activating it. You must activate the option among this as it **Can be Rented**.

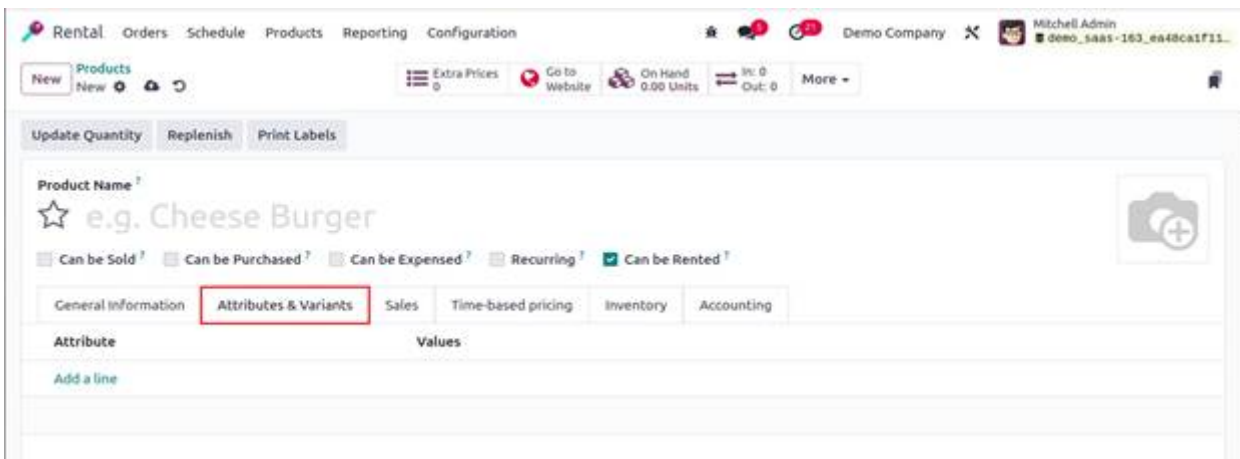
You now have access to a number of tabs where you can enter various product-related information. You can select the **Product Type** under the General Information tab by using the drop-down menu. The ordered quantity or delivered quantity options are available for the Invoice Policy. You can also include the **Units of Measure, Purchase UoM, Sales price, and Customer Taxes** in the designated box. The following options are, in order, **Taxcloud category, Avatax category, Product category, Internal reference, Barcode, Tags** connected to the product, and **Company** name. You can make a message about the product in the **INTERNAL NOTES** section which is highlighted in the screenshot below.

Unit of Measure [?] Units
Purchase UoM [?] Units
Create Repair [?] ☐
Brand

INTERNAL NOTES
This note is only for internal purposes.

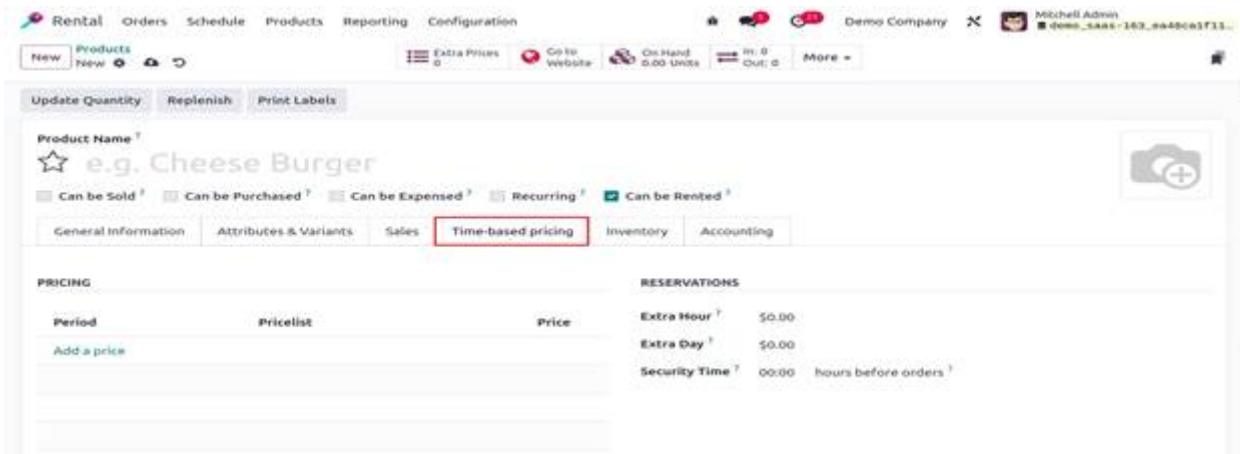
Avatax Category [?]
Cost [?] \$0.00 per Units
Product Category [?] All
Internal Reference [?]
Barcode [?]
Product Template Tags [?]
[Configure tags](#)
Company [?]

Attributes and Variants is the next tab available after General Information, where you can enter the attribute name and its matching value. You may add the properties to the Product with ease by using the Add a Line option.



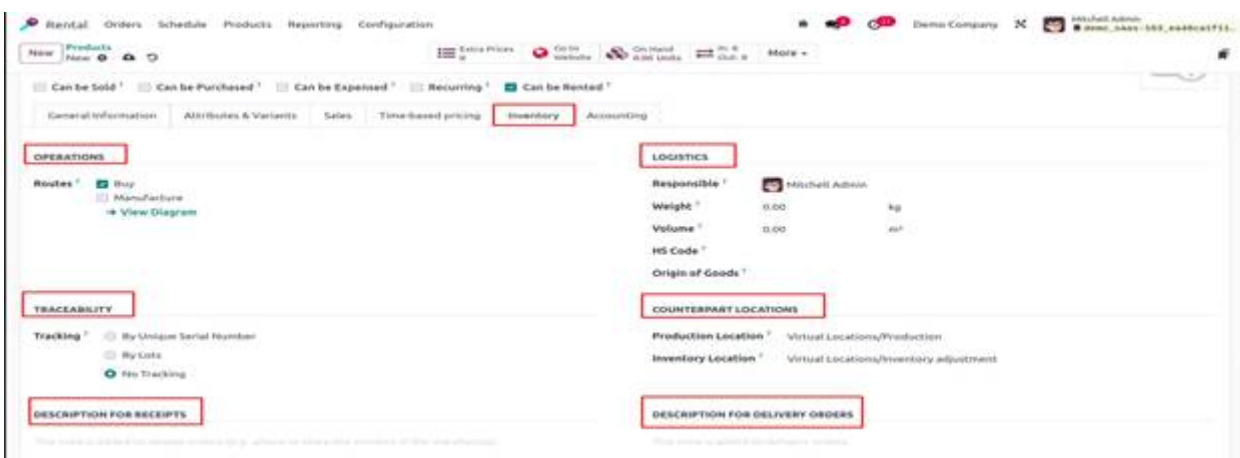
The screenshot shows the 'Attributes & Variants' tab for a product named 'e.g. Cheese Burger'. The 'Can be Rented' checkbox is checked. Below the tabs, there is a table with columns 'Attribute' and 'Values'. An 'Add a line' link is visible at the bottom left of the table.

You can add a new price by using the **Add a Price** button on the **Time-based pricing** tab, as shown in the image below. Adding the fee will depend on how long the lease is for. Price calculations can be made based on days, weeks, or months. We can also activate the rental cost based on the specified unit. The specifics include the time frame, pricing, and price list.



The screenshot shows the 'Time-based pricing' tab. It features two main sections: 'PRICING' and 'RESERVATIONS'. The 'PRICING' section has a table with columns 'Period', 'Pricelist', and 'Price', and an 'Add a price' link. The 'RESERVATIONS' section includes fields for 'Extra Hour', 'Extra Day', and 'Security Time'.

RESERVATIONS are the following option in the time-based price, where you can also add extra hours, days, and security time. You can supply the **Security Time** in between two rentals with the aid of the security time. The product won't be available at this security time, and Odoo 17 ERP ensures that it is returned or not before the next rental.



The screenshot shows the 'Inventory' tab. It is divided into several sections: 'OPERATIONS' (with 'Routes' and 'View Diagram' options), 'TRACEABILITY' (with 'Tracking' options), 'DESCRIPTION FOR RECEIPTS', 'LOGISTICS' (with 'Responsible', 'Weight', 'Volume', 'HS Code', and 'Origin of Goods' fields), 'COUNTERPART LOCATIONS' (with 'Production Location' and 'Inventory Location' fields), and 'DESCRIPTION FOR DELIVERY ORDERS'.

The next tab is the **Inventory** tab. You can add the **Routes** as buy, drop-ship subcontractor on order, manufacture, replenish subcontractor on order, or drop ship using the **OPERATIONS** option

found under the inventory tab. If necessary, you can also view the diagram using the View Diagram option.

The **Responsible** user, **Weight**, **Volume**, **Manufacturing lead time**, **Days to generate manufacturing order**, **HS code**, and **Origin of Goods** must all be added under the **LOGISTICS** option.

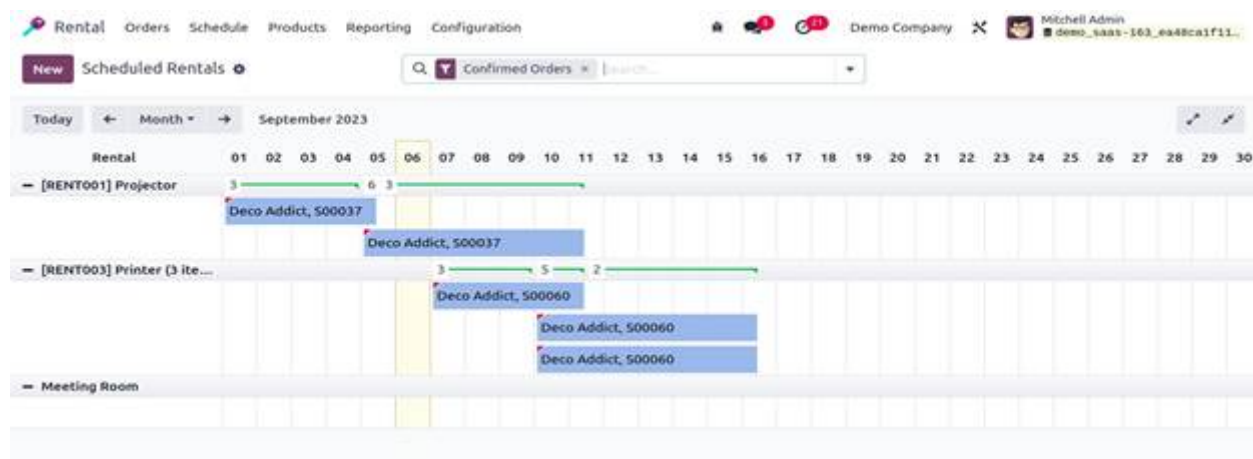
You have the choice of specifying tracking by a unique serial number, by batches, or by no tracking under the **TRACEABILITY** option. You can now add information by selecting the Add a Line option under the **PACKAGING** option. Here, you must list the packaging, package type, contain, units of measurement, sales, and purchases. You can enter the notes for the receipt orders under the Description for receipts option. A brief comment may also be put beneath the delivery order description. Similar types of remarks can then be readily added under the description for internal transfers.

As can be seen in the screenshot above, the **Accounting** tab is the next one. Under the **RECEIVABLE** option, you must enter the Income Account; under the **PAYABLE** option, the expense account and price difference account; under the Intrastat option, the commodity code and country of origin; and under the **AUTOMATIC EMAIL AT INVOICE** option, the email template.

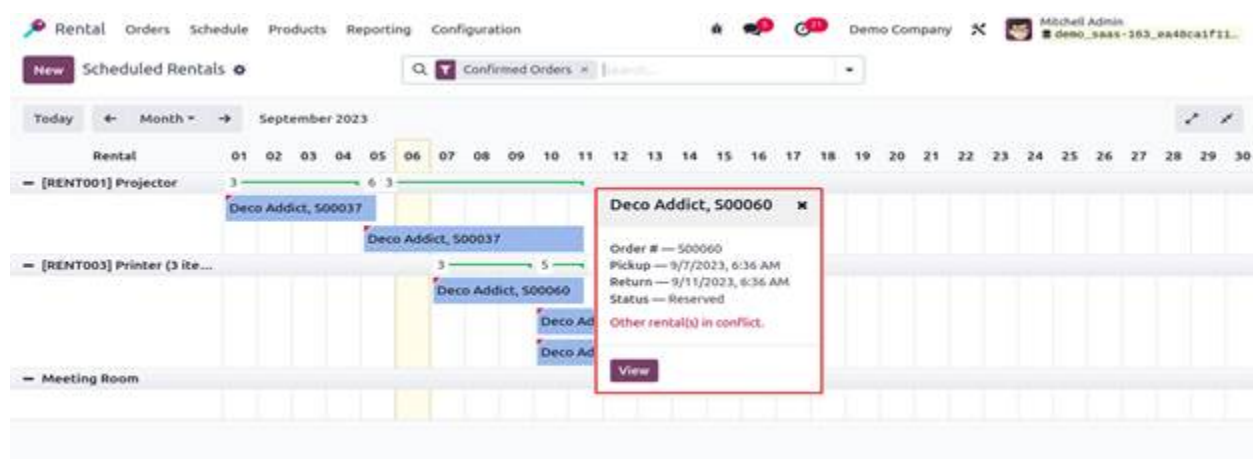
You can get the information after submitting all the required information or after creating a rental product. Then, this item is included in the list of rental items that have already been produced.

Schedule

Under the schedule menu of the rental module, all planned orders will be accessible. This option enables you to complete all rental-related tasks and activities. This page will contain all of the rental activities created during specific days, weeks, months, or years.

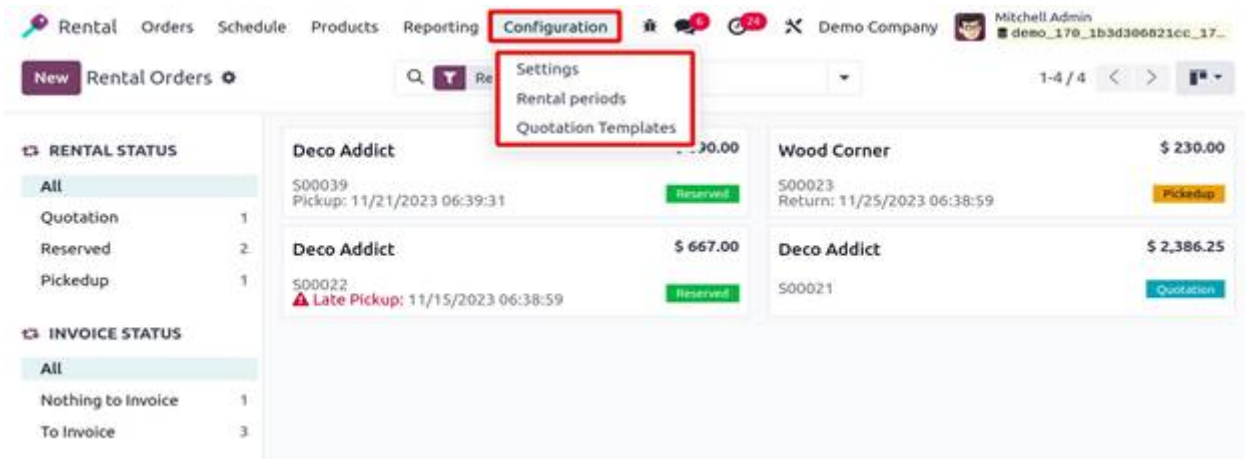


All of the aforementioned daily, weekly, and annual statistics can be simply analyzed with the use of this page. The total number of orders, the pickup and drop-off times, and the current state of the rental order can all be viewed without any risk by selecting a specific rental order from the list.



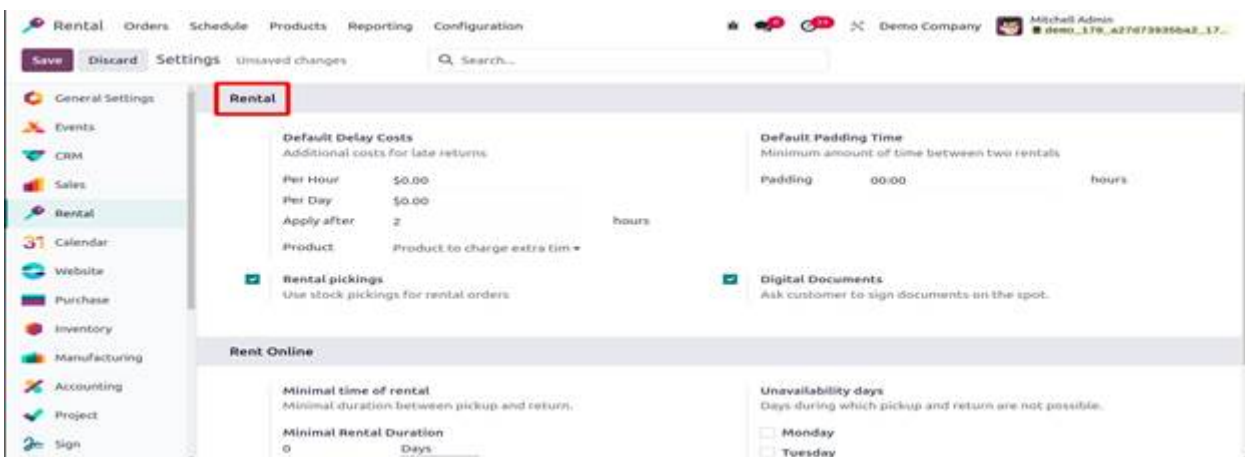
Configuration

The rental module Settings, Quotation Template and Rental Periods are available under the page's setup menu, as illustrated below.



Settings

Under the **Settings** of the rental module, there are choices for renting and renting online. The **Default Padding Time**, **Default Delay Costs**, **Rental Picking** and options for **Digital Documents** are available under the rental option in the settings. It is simple to add the smallest number between two rentals under the Default padding time. The time spent in question will be regarded as the preparation period for the item before the following rental. To use stock deliveries and receipts for rental orders, activate Rental picking.



An extra fee for the late return can be offered under the default delay fees option. The new rental seal will be charged the fee. For the produced products, the values can be changed from the product form. On this option, the price for additional hours and days can also be turned on. The shortest amount of time can be given here before this fine is applied. The digital document option activates a new default document template for the specific locations. A new default document can also be added using the upload template.

Rent Online is the second tab found under **Settings**, as seen in the screenshot below.

The screenshot shows the Odoo 17 Rental Configuration page. The 'Rent Online' option is highlighted with a red box. The page includes a sidebar with various modules like General Settings, Events, CRM, Sales, Rental, Calendar, Website, Purchase, Inventory, Manufacturing, Accounting, Project, and Sign. The main content area has several sections: 'Apply after' (2 hours), 'Product' (Product to charge extra time), 'Rental pickings' (checked), 'Digital Documents' (checked), 'Minimal time of rental' (Minimal duration between pickup and return), 'Minimal Rental Duration' (0 days), and 'Unavailability days' (Saturday and Sunday checked).

You can enter the minimum rental period, the minimum rental period's duration, and the days on which pickups and returns are not permitted here. Every day of the week is offered for you here. This indicates the days that rentals are not permitted. The Rent Online option includes an **Unavailability Days** option that lists the days when pickup and drop-off are not feasible.

Rental Periods

You can choose another option for **Rental Periods** under the **Configuration** menu, which includes information such as name, duration, and unit. The page will look just like the one in the screenshot below. By selecting the New icon and entering the desired name, duration, and unit details, you can quickly establish a new rental period and add it to an existing group.

The screenshot shows the Odoo 17 Rental Periods page. The 'New' button is highlighted. The page includes a sidebar with various modules like Rental, Orders, Schedule, Products, Reporting, and Configuration. The main content area has a search bar and a table with the following data:

Name	Duration	Unit
Daily	1	Days
Hourly	1	Hours
3 Hours	3	Hours
Monthly	1	Months
Quarterly	3	Months

Quotation template

The **Rental Quotation template** is a new feature added to Odoo 17. To create a new quotation template, select **Quotation template** from the **Configuration** menu. This list contains all of the quotation templates that were used in the rental orders, including recurring plans and corporate quotes.

Quotation Template	Recurring Plan	Company
☐ Large Meeting Table		
☐ Meeting Room		
☐ Monthly	Monthly	
☐ Yearly	Yearly	

You can include the name of the quotation template in the field that is available. In the "Quotation expires after" section, you can enter the number of days to be used in determining the quotation's validity date. By activating the Signature feature in the online confirmation box, you can request the customer's online signature to instantly confirm the sales order. By enabling the Payment box, the consumer can use online payment alternatives to pay for their orders.

In the Confirmation Mail area, you may choose the email template that will be sent after confirmation. You can enter the name of your company in the Company box. The invoice email template can be added using the Invoice Email field. The Prepayment amount is the portion of the total that needs to be paid in order to verify the quotation.

Quotation Template [?]
e.g. Standard Consultancy Package

Quotation expires after [?] 0 days

Recurring Plan [?] None

Online Signature [?] ☒

Online Payment [?] ☒

Prepayment amount [?] 100 %

Confirmation Mail [?]

Company [?]

Invoicing Journal [?]

Lines Optional Products Terms & Conditions PDF Quote Builder

Product	Description	Quant...	Unit of Measure
Add a product	Add a section	Add a note	

Recurring plans streamline the automated creation of periodic quotations in Odoo 17 quotation templates, making it easier to manage subscription-based services or goods with recurring payments.

As we indicated in the Rental Quotation setup, you will be able to find the tab to add the product list in this box. To add products, sections, and notes under the Lines tab, use the Add a Product, Add a Section, and Add a Note buttons respectively, in that order.

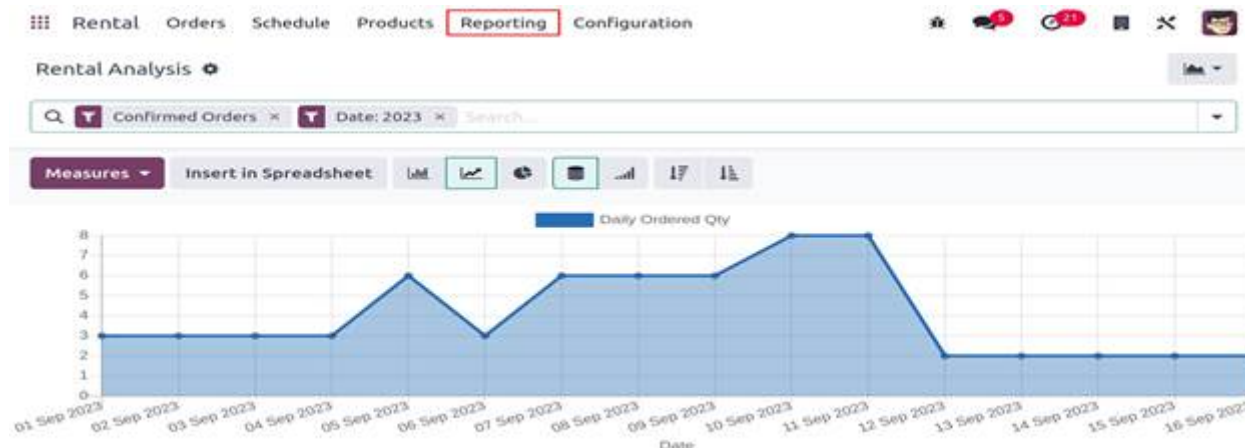
You can add the optional items that are allowed for this sale under the Optional Products tab.

The Terms & Conditions tab allows you to specify the terms and conditions that apply to this quotation template. As soon as you fill in all the required fields, your system will automatically add

the new quotation template.

Reporting

The **Reporting** option, which is visible on the module's home page, can be used to perform a thorough study of the rental product. You can acquire information on the rental orders that are placed on a daily, weekly, monthly, and yearly basis with the help of the reporting option. The reporting page will look like the one below.



As you can see, the reports on the rental order are displayed pictorially on the page. You also have the Pivot view of the page in addition to the graphical view. Measures including daily amount, daily ordered quantity, daily picked-up quantity, and daily returned quantity can all be used. You can also display the graph based on the count. To categorize them based on our needs, you can apply certain filters and group by options. Using the star icon on the page, you can mark them as favorites. Even better, you may contrast the current report with the previous one.

These are the main features offered by the Odoo17 ERP Software's Rental module. The module significantly aids users in controlling rental orders and quotes through easy processes.

Revision #1

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