

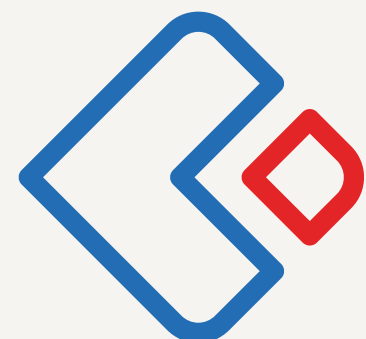


# FIXED ASSETS RENTAL APP

# ZOHO CREATOR

Developed For Saudi Rental Assets Ind.

**Presented By**  
USAMA AHMED



Zoho  
**Creator**

# CLIENT & PROJECT OVERVIEW

Saudi Arabian company renting fixed/non-fixed assets to corporate clients

## Vision

To build a custom Zoho Creator app that tracks asset deliveries, returns, and generates rental invoices, fully integrated with Zoho CRM.

# KEY CHALLENGES

- Manual tracking of asset deliveries and returns was error-prone
- No centralized visibility into rented vs. available assets
- Invoicing was inconsistent and time-consuming
- Partial deliveries and returns were hard to manage

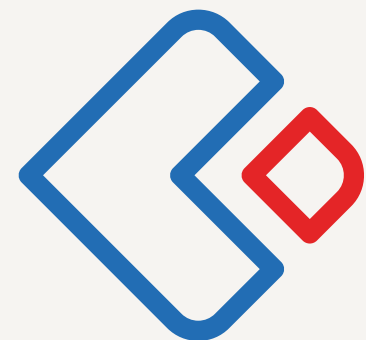
# MY SOLUTION



- ✓ **Asset master management with real-time tracking**
- ✓ **Integrated with Zoho CRM Sales Orders**
- ✓ **Partial delivery and return management**
- ✓ **Dynamic invoice generation based on asset movement**
- ✓ **User-friendly UI for operations team with buttons, subforms, and automation**



# CORE MODULES



Zoho  
**Creator**

# ASSET MASTER

- Categorized as Fixed / Non-Fixed
- Tracks total quantity, delivered qty, balance with client
- Subform for delivery/return logs (with dates & qty)

Fixed Assets - Issuance & Invoicing

Subscription Edit this application Help

Fixed Assets - Issuance & Invo...

Masters Dashboard Assets Projects Transactions Reports

Item Master

Name \* Sample Fixed Asset

Asset Number \* FA-00311

Unit EA

Serial Number 0001

Monthly Rental 500.00

Status Active x v

Total Stock 55000.00

Stock with Batin 55000.00

Stock with Client 0

Item Type Fixed Asset x v

Asset Trackings

Transaction Date	Client Name	Type	Transaction Qty	Balance Qty
28-Apr-2025 00:00:00	Arabian Softwares v	Delivered x v	20.00	20.00
30-Apr-2025 00:00:00	Arabian Softwares v	Returned x v	15.00	5.00
30-Apr-2025 00:00:00	Arabian Softwares v	Returned x v	5.00	0

Update Cancel

# SALES ORDER SYNC (CRM INTEGRATION)

- Syncs new orders from Zoho CRM in real-time
- Allows partial delivery processing
- Status auto-updates to “Delivered” after full delivery

**Add Sales Order**

Category: Sales

Attention: Test Attention

Status: Created

Customer No:

Delivery Status: Partially Delivered

**Address Information**

**Billing Address**

Address Line 1: 1415

Address Line 2: Riyadh 1415

City / District: 12345

State / Province: -Select-

Postal Code: -Select-

Country: -Select-

**Shipping Address**

Address Line 1:

Address Line 2:

City / District: -Select-

State / Province: -Select-

Postal Code: -Select-

Country: -Select-

**Ordered Items**

SI No.	Quantity	Already Delivered Qty	Balance Qty	Qty to Deliver Now	List Price
1	50.00	20.00	30.00	0	500.00
2	100.00	30.00	70.00	0	1,000.00

+ Add New

Totals

Fixed Assets - Issuance & Invoicing

Subscription Edit this application Help

Fixed Assets - Issuance & Invo... Sales Orders

Masters Transactions Asset Sales Orders Asset Deliveries Asset Returns Rental Invoices Asset Write Offs Reports

Subject: Quotatin for ScaffoldUserTraining

Quotatin for: QUOTATION FOR SALE OF FORMWORK MATER

Sample Quote 23 Apr US

**Overview**

Subject

Revised Version

Quote Stage

Reference No

Quote No

Carrier

Client Name

Contact Name

Category

Attention

Status

Customer No

Quote Name

Quotation Date

Billing Address

Shipping Address

Sub Total

Discount

Total After Discount

Tax Total

Grand Total

Payment Terms

Delivery Terms

Quotation Validity

Showing 5 of 5

# DELIVERY & RETURN MANAGEMENT

- **Delivery Notes auto-created from Sales Orders**
- **Partial delivery supported**
- **Track complete delivery history with one click**
- **Asset Returns auto-fetch delivery data**
- **Supports full & partial return per delivery**
- **Auto-calculate returned qty & remaining qty**

The screenshot shows the 'Add Asset Return' form. It includes fields for 'Delivery Note No.' (DN-2025-74), 'PO No.' (REF-1234), 'Received Date' (30-Apr-2025), 'Driver Name', 'Vehicle No.', and 'Transported By'. Below these is a table for 'Return Details' with columns for Asset Name, Asset Code, Delivered Qty, Balance Qty to Return, Total Received (in Good Condition), and Defective Qty. Two rows are shown: 'Sample Fixed Asset' (0001) with 20.00 delivered and 5.00 balance, and 'Sample Asset 02' (0002) with 30.00 delivered and 10.00 balance. 'Update' and 'Cancel' buttons are at the bottom.

Asset Name	Asset Code	Delivered Qty	Balance Qty to Return	Total Received (in Good Condition)	Defective Qty
Sample Fixed Asset	0001	20.00	5.00	5.00	#####.##
Sample Asset 02	0002	30.00	10.00	10.00	#####.##

The screenshot shows the 'Add Asset Delivery' form. It includes fields for 'Delivery Date' (28-Apr-2025), 'PO No.' (REF-1234), 'Project' (-Select-), and 'PO Date' (dd-MMM-yyyy). Below is a table for 'Details' with columns for Asset Name, Asset Code, Unit, Available Qty, Qty, Price, and Return Status. Two rows are shown: 'Sample Fixed Asset' (0001) with 55000.00 available and 20.00 qty at 500.00 price, and 'Sample Asset 02' (0002) with 55000.00 available and 30.00 qty at 1,000.00 price. 'Update' and 'Cancel' buttons are at the bottom.

Asset Name	Asset Code	Unit	Available Qty	Qty	Price	Return Status
Sample Fixed Asset	0001	EA	55000.00	20.00	500.00	Returned
Sample Asset 02	0002	EA	55000.00	30.00	1,000.00	Returned






# RENTAL INVOICE GENERATOR

- **Select client, time period, PO Nos, and criteria**
- **Criteria Options:**
  - **◆ All: Unreturned assets from previous months**
  - **◆ Delivery: Assets delivered but not returned this month**
  - **◆ Return: Assets returned in current month**
- **One-click invoice generation with relevant asset info**

The screenshot shows a web application interface for generating rental invoices. The title bar reads 'Fixed Assets - Issuance & Invoicing' and 'Generate Rental Invoice'. The left sidebar contains a navigation menu with options: Masters, Transactions, Asset Sales Orders, Asset Deliveries, Asset Returns, Rental Invoices (highlighted), Asset Write Offs, and Reports. The main form area includes the following fields and controls:

- Client Name:** A text field with a blacked-out value.
- Transaction Type:** A group of checkboxes with 'All' (unchecked), 'Delivery' (checked), and 'Return' (checked).
- Project:** A dropdown menu showing '-Select-'.
- PO No's:** A text input field showing '-Select-'.
- Rent Period - Start Date:** A date field containing '15-Apr-2025'.
- Rent Period - End Date:** A date field containing '30-Apr-2025'.
- Buttons:** 'Update' and 'Cancel' buttons are located below the date fields.

# IMPACT & OUTCOME

-  **80% time saved in manual tracking & invoicing**
-  **100% accuracy in asset delivery & return logs**
-  **Improved coordination between Sales & Operations teams**
-  **Clear audit trail for all asset movements**
-  **Scalable solution for multi-client rentals**

# TOOLS & SKILLS USED

- Zoho Creator
- Deluge scripting
- Zoho CRM API Integration
- Custom buttons, forms, subforms
- Automation and business logic design

# LET'S WORK TOGETHER

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*“Helping businesses automate operations with smart Zoho solutions.”*