RentalPoint Fast Report Integration

RentalPoint Fast Reports at a Glance

Fast Report has been integrated into RentalPoint in order to add flexibility to output documentation and report generation. Unlike RTF templates where you could only use a certain set of data, with Fast Report you can use any data from the RentalPoint Database to create your personal templates.

As we transition to Fast Reports, users will have the option to use both report outputs in RentalPoint. There are now two menu options, Print and Print [Fast Report]

- All the main functionality of Fast Report is integrated into RentalPoint, so in order to use the templates of Fast Report you do not need any additional licensed software. All you need is a PDF file viewer program, which is freely available!
- Fast Report templates are NOT STORED in the DOCS folder as RTF templates, so constant access to this folder is NOT needed. Instead, when you import a Fast Report template to Rentalpoint, it is STORED IN THE DATABASE.
- The main types of Fast Report templates will be available when you install RentalPoint v11.0.8.0
- You can download any new Fast Report Template to Rentalpoint. See 'How to Load New Fast Reports' for further details.

Enable Fast Report Option in RentalPoint

- Open Parameters setup.
- Go to Operational parameter # 84 and select "Both" (Default option) to use Fast Reports and RTF or Fast Report/RTF only.
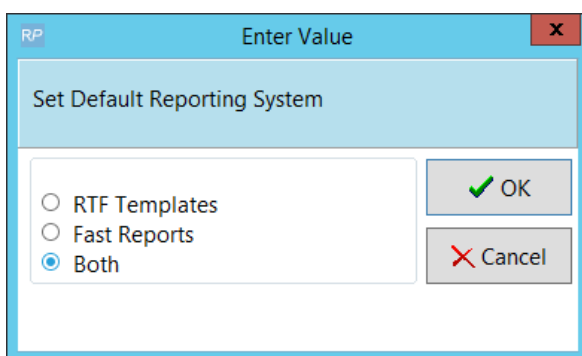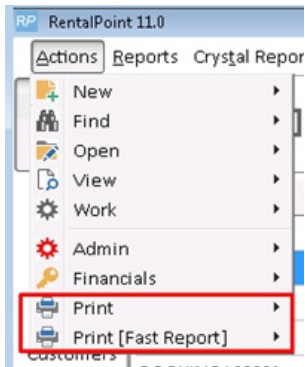

- Log out of Rentalpoint and back in again
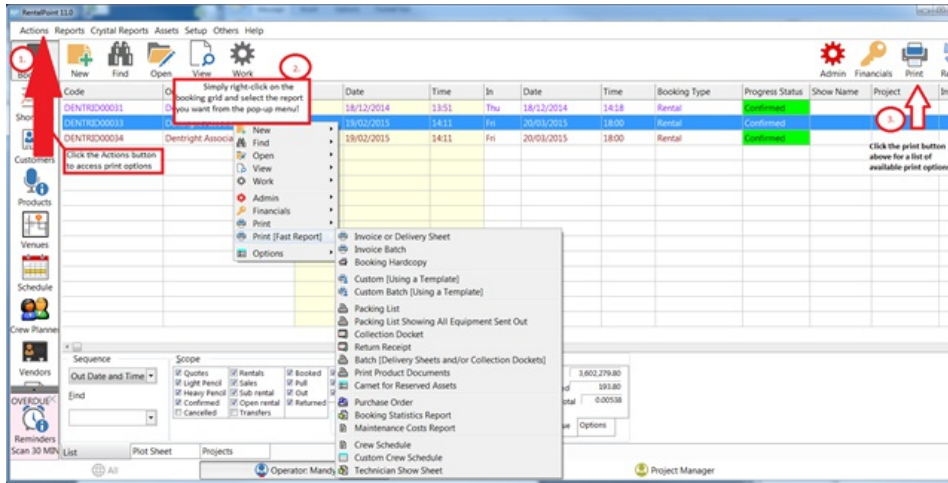- Fast Report Options will now be available throughout Rentalpoint.

Print/Preview Fast Reports

There are several ways to access the print options – see illustrations below

From the Rentalpoint Main Menu, click Actions

- Choose 'Print' to print any RTF document/report
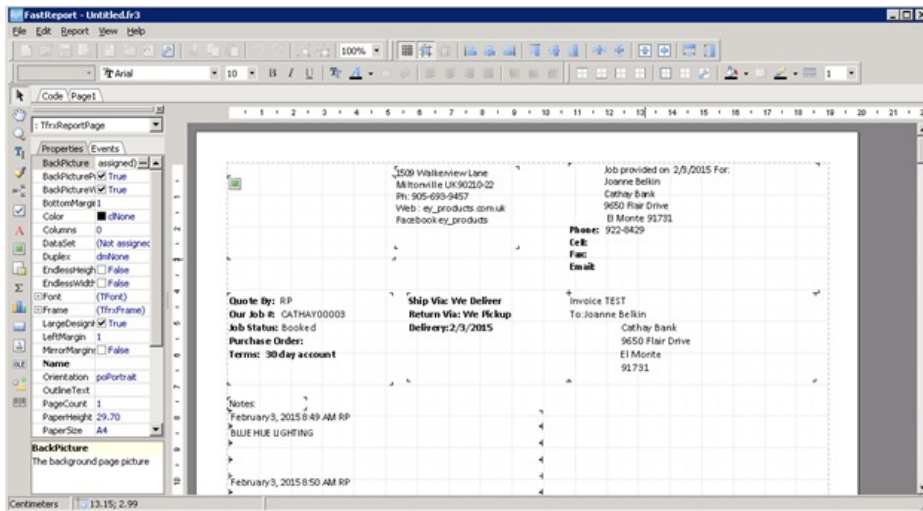- Choose 'Print [Fast Report]' to print any Fast Report document

When merging the report, choose the 'preview' option. This function provides the user with the ability to **view and make changes to the merged document** before sending it off to clients.
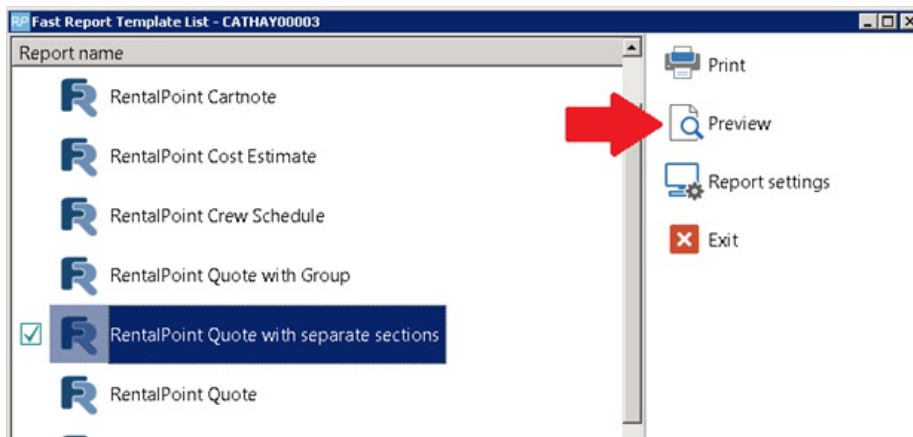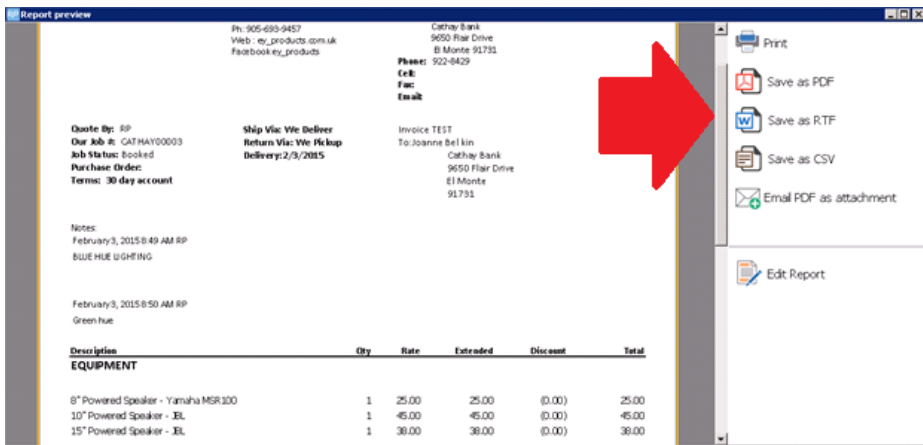

Click the edit button to make slight changes to your ouput IF NEEDED
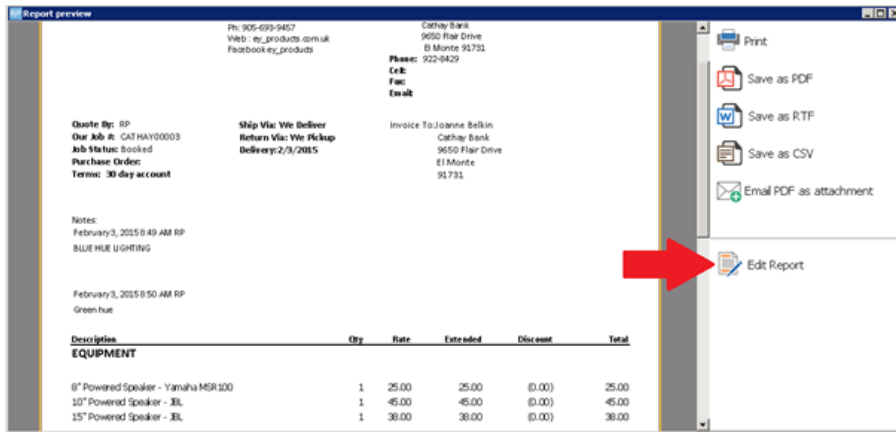
Click X to close and YES to save your changes
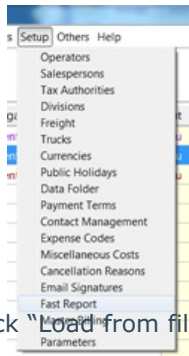

Then choose how you would like to save/send your file.

Load New Fast Reports

4. How To Load New Fast Reports

- In order to load the new FastReport template into RentalPoint:
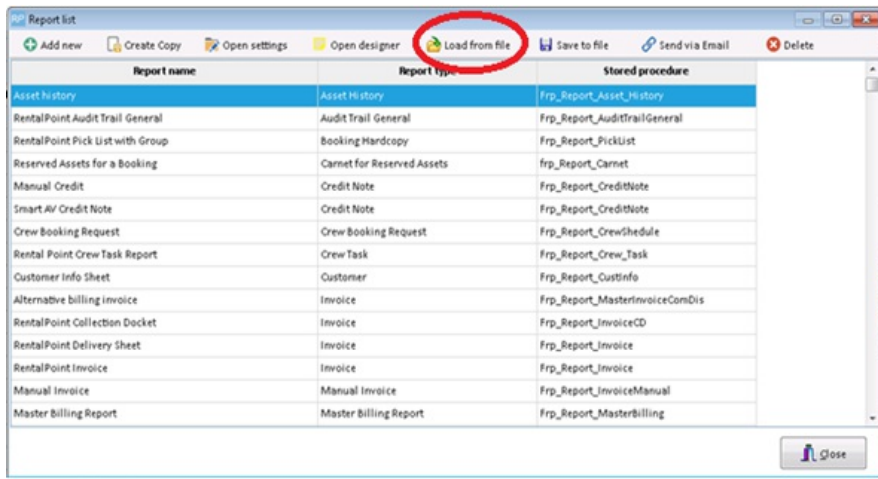
-

    - First save your new Fast Report template

to any folder and remember the path to it.

The default path will be

DOCS\FastReportTemplates

- From the main Rentalpoint menu, goto

setup-->Fast Reports.

- Click "Load from file" button and browse to find the template that you saved earlier.
- Then 'Double Click' on your template and it will appear in your list.

The Report List Window

The Report List window this is the main window for working with Fast Report templates. Here we can create new templates or edit existing ones, and also import or export templates:
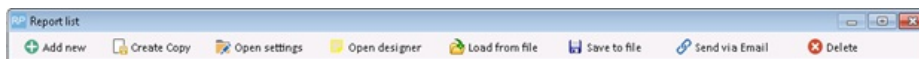
- Add new – Adds new blank report template
- Create Copy – Copies selected report template
- Open settings – Opens template settings
- Open designer – Opens template designer, you can add data fields there or delete them.
- Load from file – Loads template to RentalPoint
- Save to File – Saves FastReport template to selected folder
- Send via Email – Send your template via Email
- Delete – Deletes selected template

Add New - Adds new blank report template

Creating a new template requires knowledge of Fast Report functionality, Details can be found on the Fast Report website.� � Knowlege of Fast Reports is assumed when covering the details below.

To create a foundation for your future report, click 'Add New' button, then fill in the blanks as per field descriptions below.
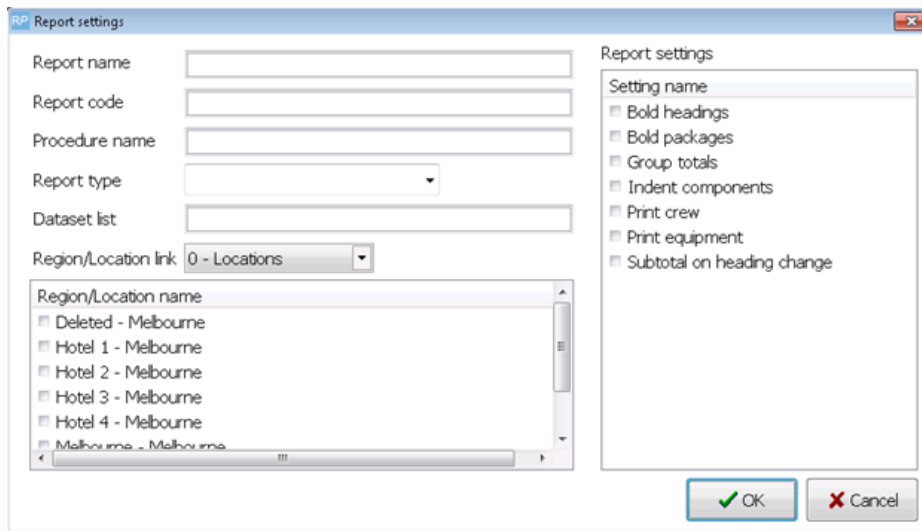
Field Descriptions:

- Report name – in this field, you must specify the name of your future template (this name will appear in the program as a template name);
- Report code – in this field, you must specify a unique code that will be assigned to the report. This code will be used by the program to recognize your template to import or export files (it will not be displayed anywhere);
- Procedure name – in this field, you must specify the stored procedure name from Data Base. You can create a new one or just copy the same;
- Report type – in this field, you select the type of your future report. Depending on the type of the template, the program will place it in the correct form of the program;
- Dataset List – in this field, you must specify all the data set names that the stored procedure returns (for example: Operator;Credit;Customer;Booking;Equipment... so on);
- Region/Location Link – in this field, you need to select the regions and locations that will be available to your report;
- Report settings – in this field, you can choose formatting options for your template.
- When all fields are filled just click Ok button. And our template appears in the list of templates.

Open settings – Opens template settings

The "Open settings" button allows you to view and edit Report settings in templates that were saved previously. Most often, this functionality is used to change the name of the report and the availability in the regions and locations.

Just click Open settings button, then in the window that appears, make your changes and click the OK button.
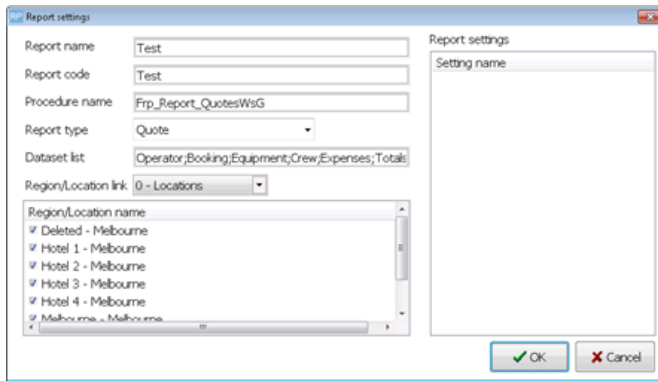
Open designer – Opens template designer, you can add data fields there or delete them

Creating a New Fast Report Template

Now we pass directly to the creation of the template. Please be aware that knowledge of Fast Report Design is necessary prior to proceeding with this help document, Details can be found on the Fast Report website.< br>Select the new template you just added and click the "Open designer" button.

And now we can begin to create our design template as per Fast Report Design functionality Details can be found on the Fast Report website. < /p>
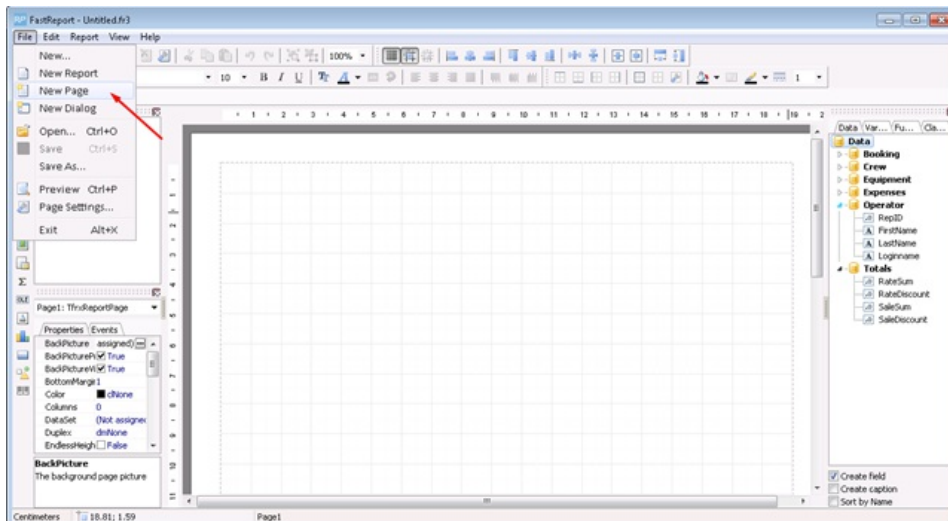
Modifying an Existing Fast Report Template

Consider a few simple examples on how to format an existing report/template. For this we chose Quote Fast Report.

If a user attempts to edit a default Fast Report, Rentalpoint will advise that this report is READ ONLY and cannot be modified. You can take a copy of the report to modify it; the copy function will also make a copy of the stored procedure used to run the report.
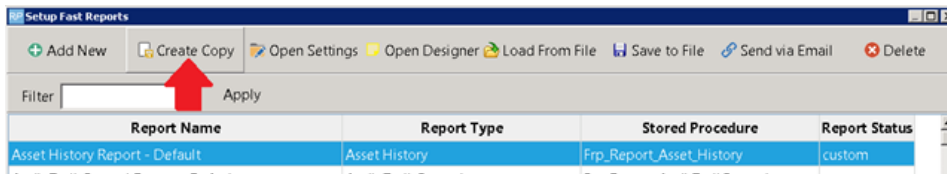
Replace an existing field on a Fast Report Template

Let's change the [Operator."Loginname"] field to the [Operator."Firstname"] and [Operator."Lastname"].

First Double Click on the area of the field that we want to edit.Then select [Operator."Loginname"] record and click Delete button on your keyboard.
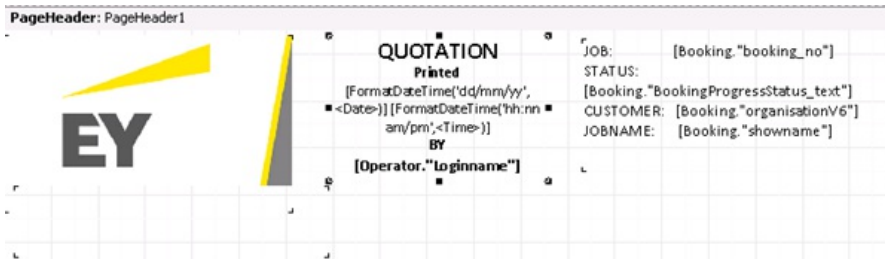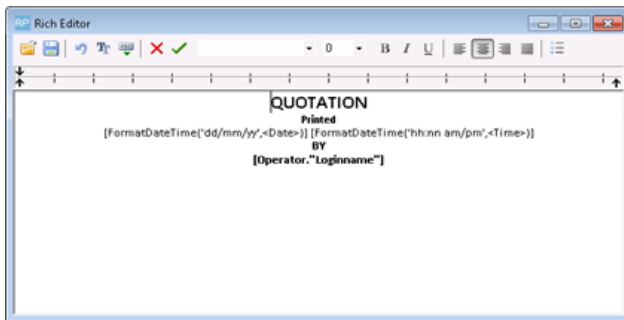

Once we removed the field that we want to replace let's add new fields:
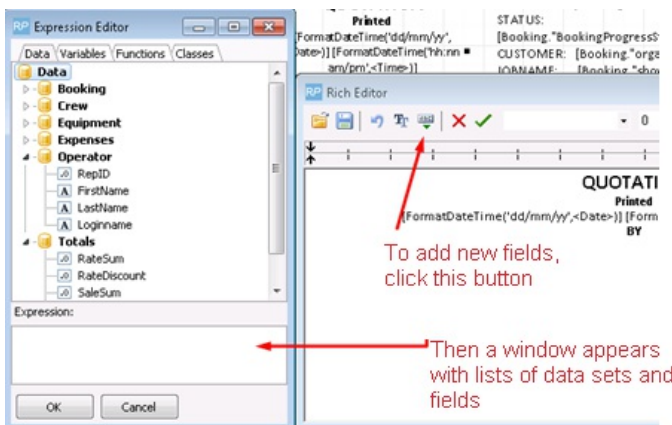
In the Expression Editor list (see prev screen shot), select the needed fields and click the OK button.

- In our option we need to select Operator/ FirstName and click OK
- Then select Operator/ LastName and click OK.
- We also have the ability to format the text as desired.

If you did everything correctly you should get this record:

After that you need to click OK button

And you should see the next image Note: (the full text is hidden under another field):

Now we need only save our report and try to print it to see that what we've got.

- To save the report, click File/ Save As.
- Close all windows and go to the Booking tab.
- Right-click on any booking you would like to test your report on.
- In pop-up menu select Print [Fast Report]/ Custom [Using a Template], then choose our edited report:
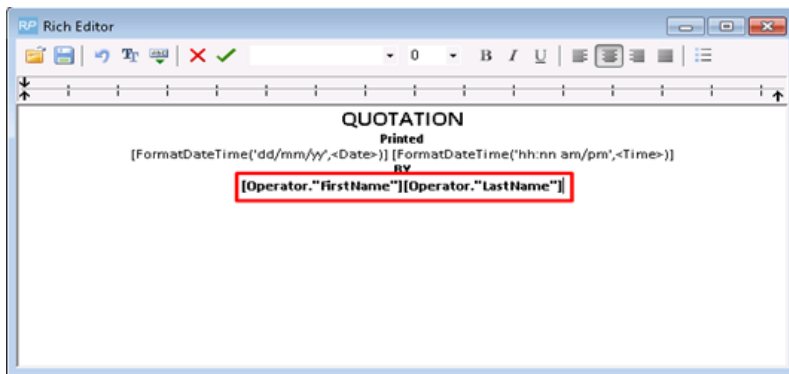
And we see that our changes have been successfully applied in the report
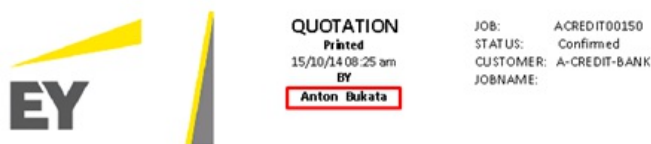
Add a New Field to a Fast Report Template

- From the main Rentalpoint menu, goto setupàFast Reports.
- Then select the Quote report and click "Open designer" button

Let's add for example the Login name and sign it. In this case the sequence is not important. You can add a caption for the field first, and then the field or vice versa.

For the purpose of this illustration, let's add the caption first:

.
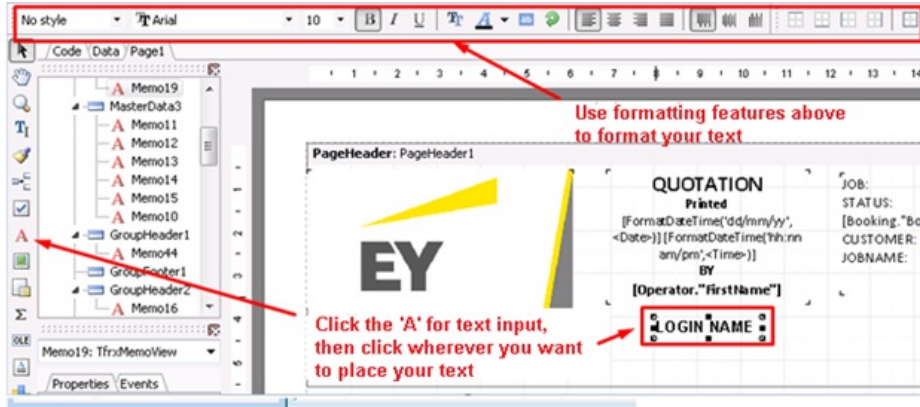
Now let's add the field itself with the data. You can simply select the desired field from the list on the right hand side, hold it and drag it to your report:
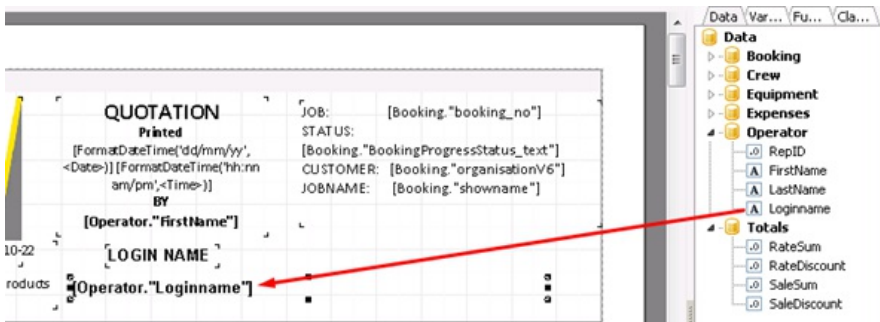
You can choose the size of the field and its location relative to the inscriptions.

Save our report. And let's print it out to make sure everything is working properly:

Use of IF statement in a Fast Report Template for line item fields

Expression Editor — Functions tab

- Ord(ch: Char): Integer
- Pos(substr, s: String): Integer
- SetLength(var S: Variant; L: Integer)
- Trim(s: String): String
- Uppercase(s: String): String

Other
- CreateOleObject(ClassName: String): Variant
- Dec(var i: Integer; decr: Integer = 1)
- ExtractFilePath(const FileName: string): string;
- IIF(Expr: Boolean; TrueValue, FalseValue: Variant): Variant   ← Double Click
- Inc(var i: Integer; incr: Integer = 1)
- InputBox(ACaption, APrompt, ADefault: string): string
- InputQuery(ACaption, APrompt: string; var Value: string): Boolean
- MessageDlg(Msg: string; DlgType: TMsgDlgType; Buttons: TMsgDlgButtons; HelpCtx: Longint): Integer
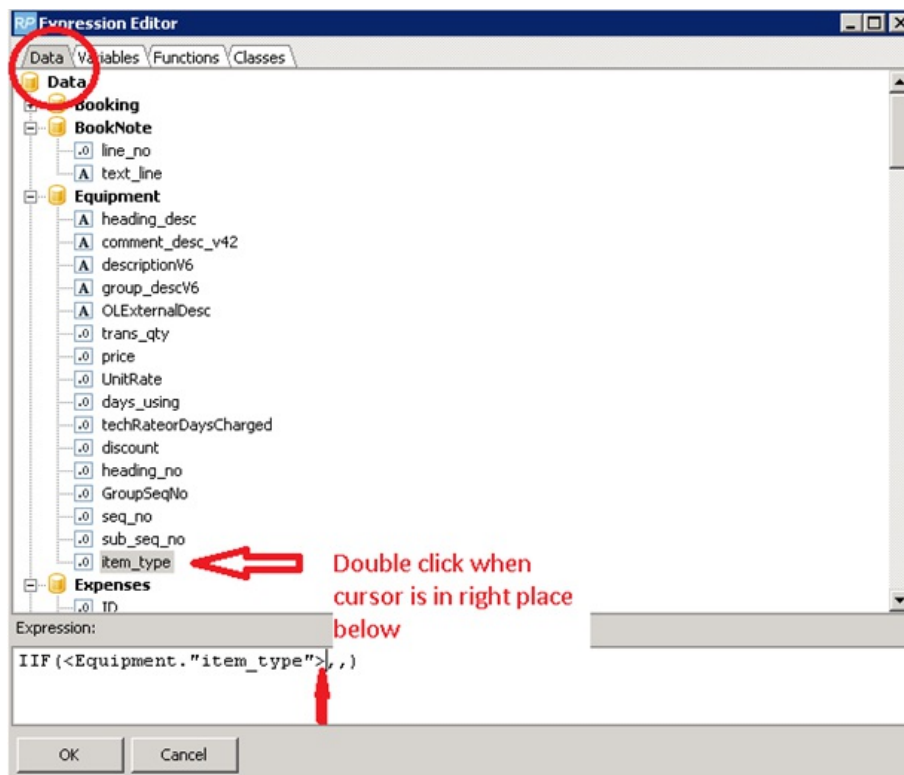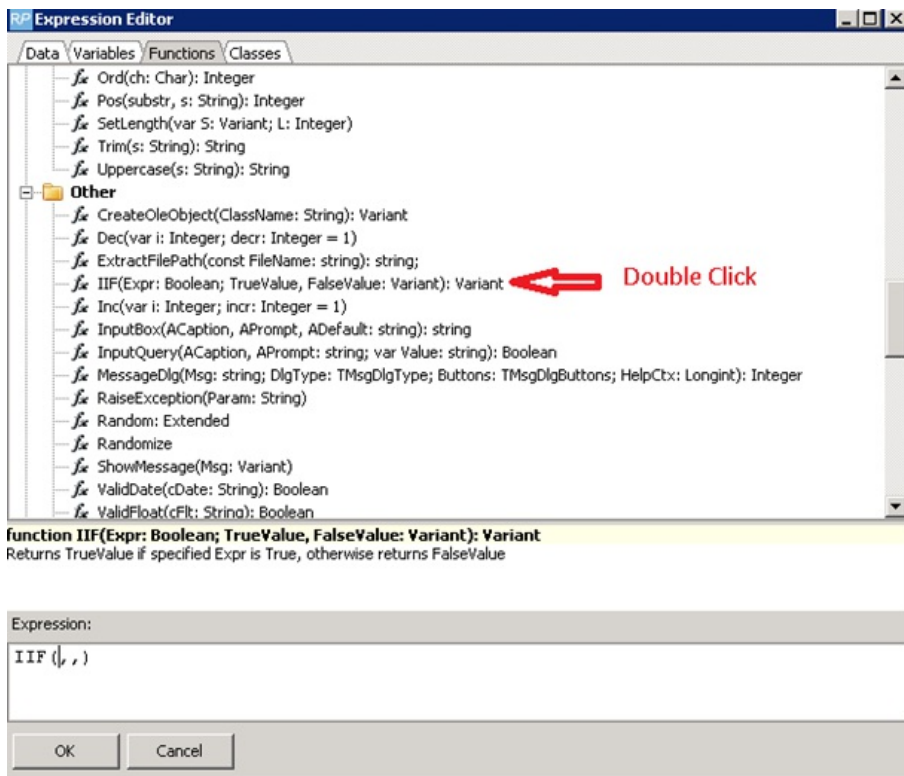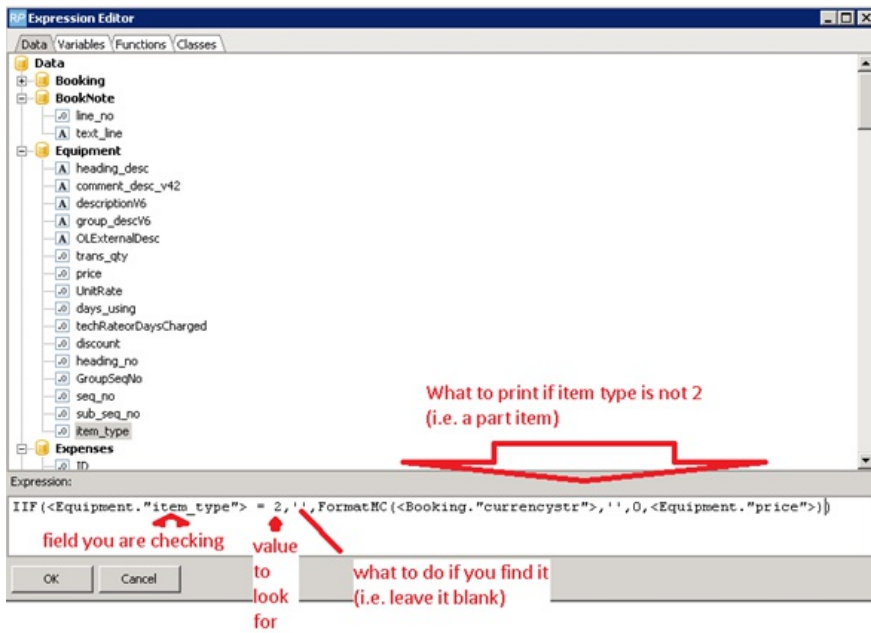- RaiseException(Param: String)
- Random: Extended
- Randomize
- ShowMessage(Msg: Variant)
- ValidDate(cDate: String): Boolean
- ValidFloat(cFlt: String): Boolean

function IIF(Expr: Boolean; TrueValue, FalseValue: Variant): Variant
Returns TrueValue if specified Expr is True, otherwise returns FalseValue

Expression:

`IIF( , , )`

OK   Cancel

Expression Editor — Data tab

Data
- Booking
- BookNote
  - line_no
  - text_line
- Equipment
  - heading_desc
  - comment_desc_v42
  - descriptionV6
  - group_descV6
  - OLExternalDesc
  - trans_qty
  - price
  - UnitRate
  - days_using
  - techRateorDaysCharged
  - discount
  - heading_no
  - GroupSeqNo
  - seq_no
  - sub_seq_no
  - item_type   ← Double click when cursor is in right place below
- Expenses
  - ID

Expression:

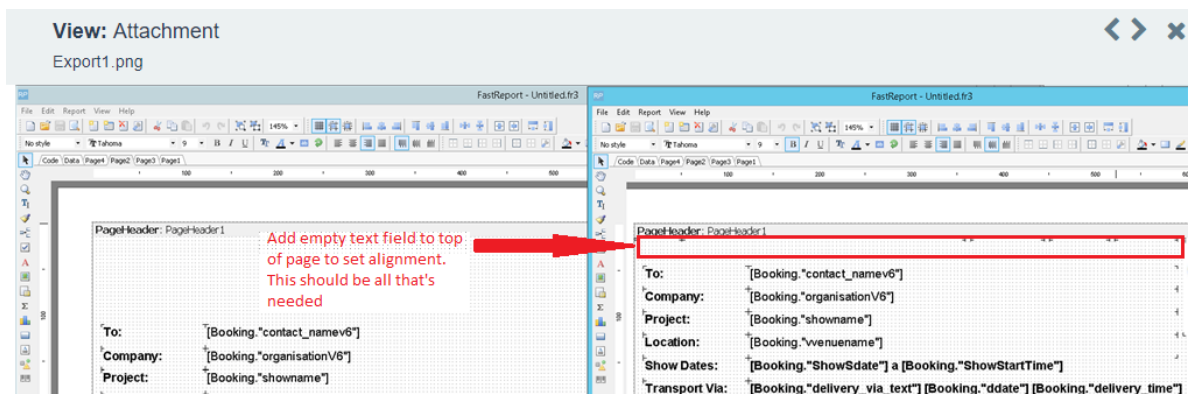`IIF(<Equipment."item_type">, , )`

OK   Cancel

How to Fix Fast Report Alignment issues

In general RTF export uses tables for exported page layout. The layout is determined from the first field in the fast report.

If your report is exporting with alignment issues, adding a text line to the top of your fast report should resolve the issue. If not, check the vertical alignment of your fields via 'properties' instead of re-positioning the fields with your mouse. Should alignment issues persist please email support@rentp.com for assistance.

Export to RTF

- Ensure Operational Parameter 208 'Show Fast Report export dialog before export' is set to YES
- Ensure your page header is free of alignment issues (see above section for more details)
- Print your Fast Report

Limitations of Fast Report Export when using Header/Footer option in Export:

- Page numbers should not be exported in headers/footers since the first page header/footer is used for all pages
- Headers/Footers will appear on every page in your exported document

Click Save as RTF

-

Export with header/footer to show headers and footers in your Fast Report

List of the Standard Fast Report Templates Available and How to Access Them

- RentalPoint Delivery Sheet – Right Click on a booking – Print[Fast Report] – Invoice or Delivery Sheet
- RentalPoint Collection Docket - Right Click on a booking – Print[Fast Report] – Invoice or Delivery Sheet
- RentalPoint Invoice - Right Click on a booking – Print[Fast Report] – Invoice or Delivery Sheet
- RentalPoint Quote with separate sections – Right Click on a booking – Print[Fast Report] – Custom[Using a Template]
- RentalPoint Quote with Group – Right Click on a booking – Print[Fast Report] – Custom[Using a Template]
- Customer Info Sheet – Right Click on a customer – Print – Print Selected Customer [Using a FastReport]
- Reserved Assets for a Booking – Right Click on a booking – Print[Fast Report] – Carnet for Reserved Assets

- RentalPoint Crew Schedule – Go to Crew Planner – Select a booking – Click on a Reports button – Crew booking request
- Crew Booking Request – Go to Crew Planner – Select a booking – Click on a Reports button – Crew booking request
- RentalPoint Project Invoice (Direct Billing) – Open Projects tab – Select a project – Press on a Project invoice button at the bottom – In opened window Check 'Use FastReport' – Click Ok
- RentalPoint Project Quote (Direct Billing) – Open Projects tab – Select a project – Press on a Project Quote button at the bottom – In opened window Check 'Use FastReport' – Click Ok
- RentalPoint Project Invoice Bill – Open Projects tab – Select a project – Press on a Project invoice button at the bottom – In opened window Check 'Use FastReport' – Click Ok
- RentalPoint Project Invoice – Open Projects tab – Select a project – Press on a Project invoice button at the bottom – In opened window Check 'Use FastReport' – Click Ok
- RentalPoint Project Quote – Open Projects tab – Select a project – Press on a Project Quote button at the bottom – In opened window Check 'Use FastReport' – Click Ok
- Master Billing Report – Open Reports (Top left of the main Rental Point window) – Financials – Master Billing Report
- RentalPoint Pick List with Group – Right Click on a booking – Print[Fast Report] – Pick List
- RentalPoint Cartnote – Right Click on a booking – Print[Fast Report] – Custom[Using a Template]
- RentalPoint Return Receipt – Right Click on a booking – Print[Fast Report] – Return Receipt
- RentalPoint PO – Go to POs tab – Right Click on a PO – Print – Print Order (FastReport)
- RentalPoint Sub Rental PO – Go to POs tab – Right Click on a Sub Rental – Print Order (FastReport) – Purchase Order
- RentalPoint Project Invoice (Alternative) – Go to Projects tab – Select Project – Press Project Invoice button – on appeared tab check "Use Fast Report"
- RentalPoint PackingSlip – Right Click on a booking – Print[Fast Report] – Packing list – Select session
- Alternative billing invoice – Go to Projects tab – Select Project – Press Project Invoice button – on appeared tab check "Use Fast Report"
- RentalPoint Collection Docket – Right Click on a booking – Print[Fast Report] – Invoice or Delivery Sheet
- RentalPoint Quote – Right Click on a booking – Print[Fast Report] – Custom[Using a Template]
- Asset history – Reports – Product Reports – Asset Reports – Asset History
- RentalPoint SalesPerson Commission – Reports – Financials – SalesPerson Commission
- RentalPoint Project Crew – Go to Projects tab – Select Project – Press Project Crew button

Table of Additional Fast Report Fields and Parameters that could be included to Stored Procedures

Parameter name	Description	Parameter Type
Operator_id	OperatorId	varchar
BackCalcDaysCharged	BoolToIntinstallation_rec.CustomDocs_BackCalcDaysCharged	varchar
DefCurrName	installation_rec.localCurrencyName	varchar
Company_name	installation_rec.company_name	varchar
Company_addr1	installation_rec.c_adl1	varchar
Company_addr2	installation_rec.c_adl2	varchar
Company_addr3	installation_rec.c_adl3	varchar
Company_State	installation_rec.c_State	varchar
Company_Country	installation_rec.c_Country	varchar
Company_PostCode	installation_rec.c_PostCode	varchar
Company_PhoneCC	installation_rec.c_PhoneCC	varchar
Company_PhoneAC	installation_rec.c_PhoneAC	varchar
Company_phone	installation_rec.c_phone	varchar
Company_FaxCC	installation_rec.c_FaxCC	varchar
Company_FaxAC	installation_rec.c_FaxAC	varchar
Company_fax	installation_rec.c_fax	varchar
Company_fax	installation_rec.c_fax	varchar
Company_MainLogo	installation_rec.MainLogoFileName	varchar
DeliveryChargeBreakdown	BoolToIntinstallation_rec.DeliveryChargeBreakdown	varchar
Truncate insurance	BoolToIntinstallation_rec.bTruncateinsurance	varchar
UseEventManagement	BoolToIntinstallation_rec.bUseEventManagement	varchar
VATRoundingdown	BoolToIntinstallation_rec.VATRoundingdown	varchar
NoTaxOnSettlementDiscount	BoolToIntinstallation_rec.NoTaxOnSettlementDiscount	varchar
DiscountTermsPerc	installation_rec.bUseEventManagement	varchar
insurancePerc	installation_rec.insurance_perc	varchar
insuranceRateTwo	installation_rec.ins_rate_two	varchar
DamageWaiverCalculation	ordinstallation_rec.DamageWaiverCalculation	varchar
ApplyinsuanceToEverything	BoolToIntinstallation_rec.bTruncateinsurance	varchar
insuranceBasedonCost	BoolToIntinstallation_rec.insurance_Basedon_Cost	varchar
instWePickup	installation_rec.Term_wepickup	varchar
instWeDeliver	installation_rec.Term_wedeliver	varchar
instDelPickup	installation_rec.termdelpickup	varchar
instCollection	installation_rec.Term_collection	varchar
Term_EventManagementFeeTitle	EventManagementTerm	varchar
Term_ConfirmedTechCaption	installation_rec.zConfirmedTechCaption	varchar
Term_WhereToMeetTechCaption	installation_rec.zWhereToMeetTechCaption	varchar
Term_CrewChief	trimfinstallation_rec.term_CrewChief	varchar
Term_GeneralLocation	trimfinstallation_rec.term_GeneralLocation	varchar
Term_CrewCustomString	trimfinstallation_rec.term_CrewCustomString	varchar

Term_CrewCustomDateTime	trimfinstallation_rec.term_CrewCustomDateTime	varchar
Term_CrewCustomList	trimfinstallation_rec.term_CrewCustomList	varchar
Term_CrewCustomInt	trimfinstallation_rec.term_CrewCustomInt	varchar
Term_CrewCustomReal	trimfinstallation_rec.term_CrewCustomReal	varchar
Term_Projectmanager	installation_rec.TermProjectmanager	varchar
Term_Salesperson	installation_rec.TermSalesperson	varchar
Term_DriversLicense	installation_rec.DriversLicense	varchar
Term_Location	installation_rec.term_Location	varchar
Term_venue	installation_rec.term_venue	varchar
Term_invoicedate	installation_rec.term_invoicedate	varchar
Term_insuranceName	installation_rec.insuranceName	varchar
Term_labour	installation_rec.term_labour	varchar
Term_barcode	installation_rec.term_barcode	varchar
Term_LossesAndBreakages	installation_rec.Term_LossesAndBreakages	varchar
Term_CustomCreditNote	installation_rec.Term_CustomCreditNote	varchar
Term_BookingHardcopyTitle	installation_rec.TermBookingHardcopyTitle	varchar
Term_PATHistReportTitle	installation_rec.PATHistReportTitle	varchar
Term_Weight	installation_rec.Term_Weight	varchar
Term_Volumn	installation_rec.Term_Volumn	varchar
Term_hire	installation_rec.Term_hire	varchar
Term_Long_hire	installation_rec.Term_Long_hire	varchar
Term_postcode	installation_rec.Term_postcode	varchar
Term_State	installation_rec.TermState	varchar
Term_Strike	installation_rec.Term_Strike	varchar
Term_subhire	installation_rec.Term_subhire	varchar
Term_organisation	installation_rec.term_organisation	varchar
Term_adr2	installation_rec.term_adr2	varchar
Term_adr3	installation_rec.term_adr3	varchar
Term_RentalDiscount	installation_rec.Term_RentalDiscount	varchar
Term_SalesDiscount	installation_rec.Term_SalesDiscount	varchar
Term_TotalDiscount	installation_rec.Term_TotalDiscount	varchar
Term_CRDateRequired	installation_rec.Term_CRDateRequired	varchar
Term_CRReturnDate	installation_rec.Term_CRReturnDate	varchar
Term_CRTransportCollection	installation_rec.Term_CRTransportCollection	varchar
Term_CRTransportReturn	installation_rec.Term_CRTransportReturn	varchar
EventManagementFeeTitle	EventManagementTerm	varchar

For example, I have a Procedure with next parameters:

ALTER PROCEDURE [dbo].[Frp_Report_CustInfo] (

```
    @Customer_code varchar(8),

    @Operator_id decimal(10,0),

    @RepID decimal(10, 0))
```

So If I need to insert Company_MainLogo, I will:

ALTER PROCEDURE [dbo].[Frp_Report_CustInfo] (

```
    @Customer_code varchar(8),

    @Operator_id decimal(10,0),

    @RepID decimal(10, 0),

    @Company_MainLogo varchar(100))
```