RentalPoint General Flow (Single Doc)

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RentalPoint Initial Setup (One Time)

- Assuming all preliminary data has been set up and parameters have been set to how your company does business (i.e. customers, vendors, trucks, pricing, inventory), you are ready to use RentalPoint.
- RentalPoint has hundreds of parameters giving the user many options as to how they want to run their business using RentalPoint Software – these are set during implementation and adjusted as necessary

Enter Booking

- Customer Details
- Calendar details (warehouse in and out dates)
- Equipment
- Crew
- Venue
- Notes
- Payment details
- Attachments (can only add attachments when booking is saved)
- Other Details (option to include booking as part of a project)
- Booking status (quote, light pencil, heavy pencil – note heavy pencil will put a hold on stock & crew)

Print Custom Document Using Template

- You control the appearance of customer facing documents via merging the bookings with MS Word or Open Office Template to produce a quote to send to the customer.

Confirm Booking

- Change status on quote to confirmed - order is a go!
- (NOTE: option to invoice booking in stages as defined by user eg. 50% now and 50% on completion)

Address any Shortages

- First examine the availability tools for option to adjust other bookings or reservations to come up with the in-house stock
    - Running balance
    - Manage reservations
    - Plot sheet
    - Availability calendar
- If still short then Resolve Shortages (for Inventory or Crew) via
    - Subrent stock/Sub contract crew – can be assigned to your order
    - Use Alternative – (can set alternatives in inventory)
    - Purchase item
    - Transfer in from another location (if using multi-location)

Proceed with Order (not limited/restricted to the sequence below)

- Optional - Post crew assignments to Google Calendar
- Print documentation (pick list/booking hardcopy)
- Process pre-payment/payment/invoice including multi stage invoicing using standard or custom docs (option to interface with accounting package)
- Process delivery and return schedule, truck schedule , Crew Planner where necessary
- Check out gear (option to use RentalPoint to Go with barcode scanning app)
- Return/Check in gear upon return (if barcoding) (option to use RentalPoint to Go with barcode scanning app)

Reports

- See Knowledgebase for the many RentalPoint Reports available
- Option to use Crystal Reports
- Option to use SQL queries via RentalPoint Excel Query Builder to export data to Excel

Archive

- Archiving prevents the system from having to load hundreds or thousands of bookings in the main booking window. Rental*Point* has *"predictive equipment scheduling"* capabilities, in other words - availability calculations that take these bookings into consideration. For example to add a line of equipment to the equipment grid in the booking, the system must search through all the bookings for the product added and calculate the available quantity, if the product has components and/or accessories attached to it then these also must be processed. Availability must also be checked when opening a booking, printing a pick list or booking hardcopy, opening the checkout window, displaying the shortage list etc.
- So if there are 1000+ bookings on the main booking grid with 100+ items in each booking,

this can add up quickly and take a lot of time to load.

- Reports are unaffected by archiving, the same data will be available before or after an archive, the reports will load data from the current tables and from the archive tables.
- Archiving should be run at least once a month.
- Bookings/Documents are still accessible in archive and can be unarchived on command