

RentalPoint Initial Setup

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Once the installation is complete you'll want to prepare the software for first use by entering the initial data you require, such as operators, tax authorities, freight option etc...

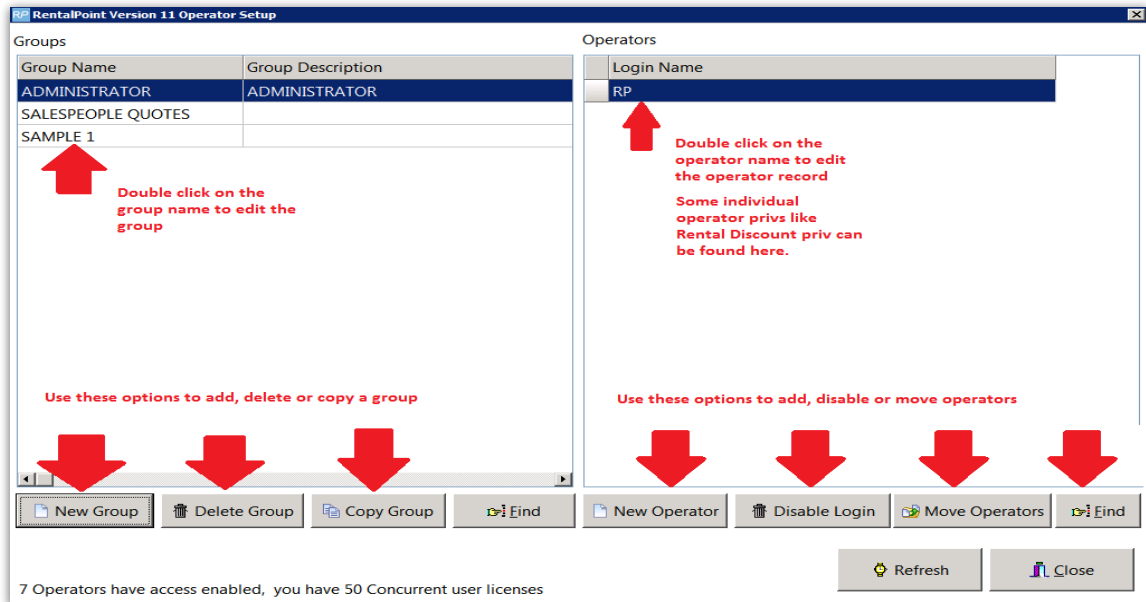
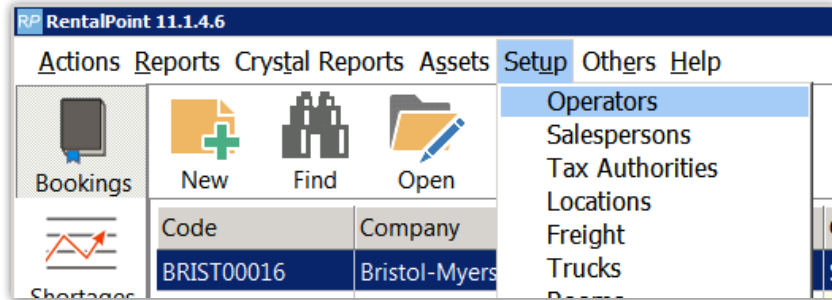
Below are the items that you'll need to set up before you start entering orders, click on the links to view detailed instruction for each item.

Operator & Operator Groups

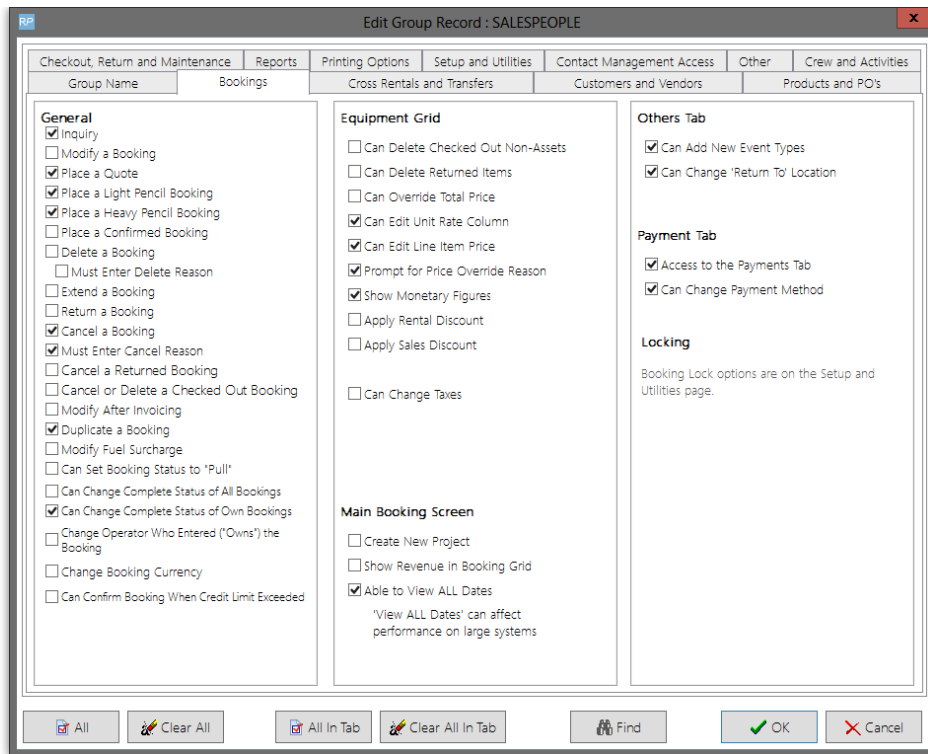
Operator or user permissions within RentalPoint are managed via "Operator Groups". Simply create a group, grant access permissions for use of different RentalPoint features to the group, and add operators to the group. Group permissions apply to all operators within the group. You'll need to enter an operator for each person you want to track in the system (though you may want a general log-in for a shop computer for instance that will be used by several people).

Managing Operator Groups

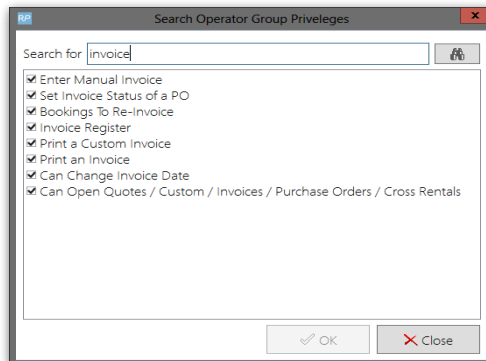
- To access operator setup go to **Setup** and click **Operators**.



- Grant rights to the group by ticking the boxes in the appropriate tabs. Click **OK** to save your changes.



- If you can't find the privilege you're looking for, try the **Find** option. Type the privilege that you're looking for and hit enter. A list of related operator privileges displays. Tick the box beside the privilege you need and click **OK**.



Create/Edit Operators

Now that you have created operator groups you can add operators to the groups. Click 'New Operator'

RP RentalPoint Version 11 Operator Setup

Groups		Operators	
Group Name	Group Description	Login Name	
ADMINISTRATOR	ADMINISTRATOR	RP	
SALESPeOPLE QUOTES		SELL2	
SAMPLE 1			

8 Operators have access enabled, you have 9 Concurrent user licenses

For each operator, you must specify a first and last name as well as user name and password so he or she may log into RentalPoint. You also must add the user to a group so he or she can have rights inherent to that group, throughout the system. As a default, the operator does not have access to anything.

Operator setup allows you to give an operator a default region and location. When he or she logs in, the main scope of RentalPoint is set to his or her default scope. Whether the operator is creating a booking or PO, viewing the schedule, or browsing the product tree, his or her scope is set to the default defined in the operator properties. You may edit these details later by highlighting the operator and clicking Properties.

Use Disable Login to deny login rights to RentalPoint. Please note, once you have created an operator you cannot delete it, only disable it. This is for tracking purposes since a specific operator is linked to a booking.

RP Add a New Operator

Operator Settings Multi Location Operator Groups

GROUP : ADMINISTRATOR

First Name

Last Name

Group (default) ADMINISTRATOR

Login Name RP

Password RP

Must assign booking to PO before saving

Maximum PO Approval Amount 1,000,000.00

Maximum Cross Rental Approval Amount 1,000,000.00

Maximum Rental Discount % 50.000000

Maximum Sales Discount % 100.000000

Booking Product Treeview Options

- Open While Adding and Editing
- Always Open
- Closed until user opens it

Default Location 0 - Toronto [Sa]

Default Division 0 - Zero

Default Salesperson MYTEST

Default Project Manager

Email settings Use Custom Email Settings

Email Address rentp.mandy@gmail.com

SMTP Address(Host) smtp.gmail.com

SMTP Port 465 SSL/TLS SSL

My smtp server requires authentication

Send Test Email

Clear Stored Password

Copy from Company Email Settings

Copy from Location Email Settings

System Administrator

Disable Login

OK Cancel

Change Operator Password and defaults

Operators can change their password by using the utility in the Others main menu. Select Others, then Operator Options, then Change Password and Operator Defaults. Enter your old password, then enter the new password and save. You must restart RentalPoint for the password and setting changes to take effect

Administrators can control this utility by setting access rights in the Setup and Utilities tab of the operator privileges.

RP RentalPoint

Actions Reports Crystal Reports Assets Setup Others Help

Bookings New Find Open View

Shortages

Customers

Products

Code	Company	Time	In	Date	Time	Booking Type
MYTEST00018	mytest	13:47	Thu	2017-02-16	13:47	Rental
MYTEST00025	mytest	12:00	Mon	2017-02-20	12:00	Rental
MYTEST00029	mytest	12:01	Tue	2017-02-28	12:00	Rental Extended From : 000
MYTEST00027	mytest	12:00				Sale
MYTEST00028	mytest					
CHESABAR00030	Chesapeake Bar Association Inc		Fri	2017-03-03	08:00	
MYTEST00024	mytest		Fri	2017-04-21	10:00	
BCUST00001	B Company		Tue	2017-04-25	08:00	

Print Cycle billed

Import / Export

Display Log Files

Archiving

Utilities

Change Operator Ctrl+F3

View Current Operators

Operator Reports

Open a Second Copy Ctrl+Alt+O

Operator Options

Turn off Outlook Security Message

Automatic Column Resizing

Directory for Carbon Copy Documents

Change Password and Operator Defaults

RP Edit Operator Record : RP

Operator Settings Multi Location Operator Groups

First Name

Last Name

Login Name

Enter Old Password

Enter New Password

Default Location [Satellit...

Default Division

Default Salesperson

Default Project Manager

Email settings

Email Address

SMTP Address(Host)

SMTP Port SSL/TLS

My smtp server requires authentication

Booking Product Treeview Options

- Open While Adding and Editing
- Always Open
- Closed until user opens it

Operator Listing and Other Reports

This is a simple report that prints an alphabetical listing of operators and the group that they are assigned to.

To run this report select the Operator Listing Report from the others main menu.

RP

Actions Reports Crystal Reports Assets Setup Others Help

Bookings New Find Open Vi

Shortages

Customers

Code	Company	Time In	Date	Time	Booking Ty
MYTEST00018	mytest	13:47	Thu 2017-02-16	13:47	Rental
MYTEST00025	mytest	12:00	Mon 2017-02-20	12:00	Rental
MYTEST00029	mytest				
MYTEST00027	mytest				
MYTEST00028	mytest				

Print Cycle billed

Import / Export

Display Log Files

Archiving

Utilities

Change Operator Ctrl+F3

View Current Operators

Operator Reports

Operator Listing Report

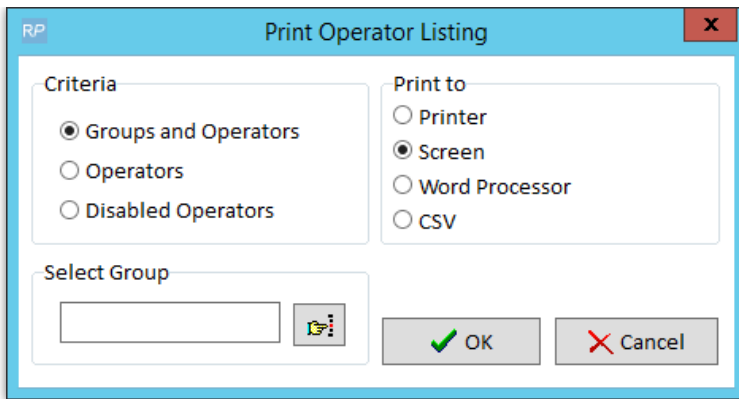
Operator Group Privileges

Audit Trail General

Open a Second Copy Ctrl+Alt+O

Operator Options

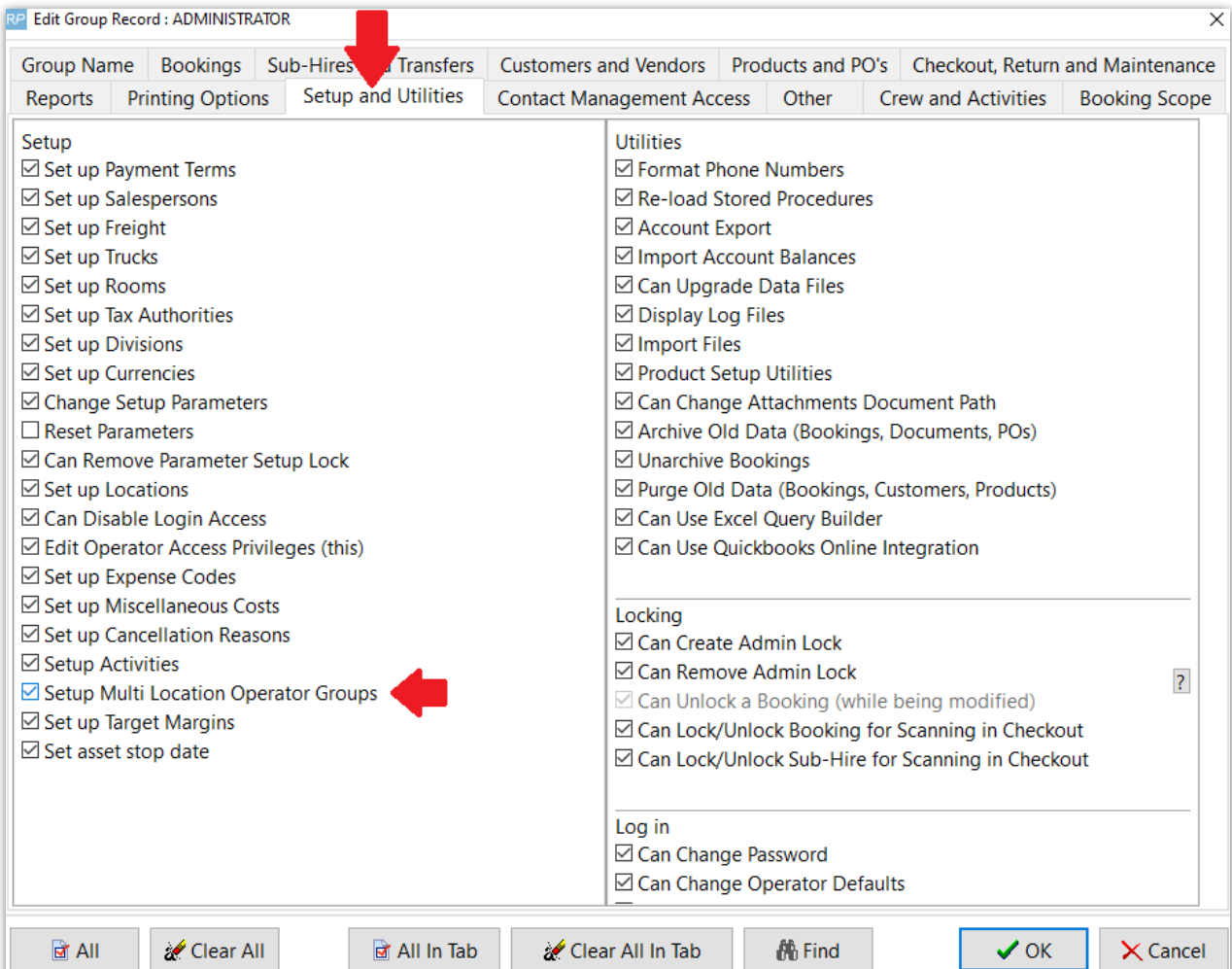
Once selected, specify scopes and click OK.



Multi-Location Security

When using the multi-location module, RentalPoint offers the ability to assign different access rights for the SAME operator at each location.

You'll need 'Setup Multi Location Operator Groups' privilege to use this functionality.



RentalPoint Version 11 Operator Setup

Groups		Operators
Group Name	Group Description	Login Name
ADMINISTRATOR	ADMINISTRATOR	RP
SALESPeOPLE QUOTES		
SAMPLE 1		

FIRST....Set up your Operator Groups as normal

THEN...Double click on the operator you want to manage permissions for

Edit Operator Record : RP

Operator Settings: **Multi Location Operator Groups**

Location	Group
Toronto	ADMINISTRATOR
New York	ADMINISTRATOR
Florida	ADMINISTRATOR
California	ADMINISTRATOR
Texas	SAMPLE 1
London	SALESPeOPLE QUOTES

For multi-location systems only, you will see an extra tab

Click the right hand corner of the box to get the drop down list of groups available

When using RentalPoint, Operator privileges will be applied on a location basis entirely dependent upon the location the user has selected.

RentalPoint 11.1.4.6

Actions Reports Crystal Reports Assets Setup Others Help

Bookings New Find Open View Work Admin Financials Print Refresh

Code	Company	Out	Date	Time	In	Date	Time	Stat	Invoice No.	Prog
BRIST00016	Bristol-Myers Squibb	Sun	26/04/2015	10:00	Tue	28/04/2015	14:11	ON		
BRIST00011	Bristol-Myers Squibb	Tue	28/04/2015	08:00	Wed	29/04/2015	09:00	BP	63	Conf
FISK00008	Fisker Automotive Corporate Office & Head	Tue	05/05/2015	15:50	Thu	07/05/2015	10:00	ON		Conf
FREE00008	Freescale Semiconductor Inc	Wed	06/05/2015	10:00	Thu	07/05/2015	10:00	BY	67	Conf
FREE00009	Freescale Semiconductor Inc	Mon	11/05/2015	10:00	Fri	15/05/2015	16:47	ON		Conf
FISK00010	Fisker Automotive Corporate Office & Head	Wed	20/05/2015	10:00	Wed	20/05/2015	10:00	BN		Conf
CANTOR00013	Cantor Fitzgerald, L.P.	Thu	11/06/2015	10:00	Fri	12/06/2015	10:00	BY	70	Conf
CHESABAR00031	Chesapeake Bar Association Inc	Fri	26/06/2015	09:00	Tue	30/06/2015	18:00	BN		Conf
CHESABAR00032	Chesapeake Bar Association Inc	Sat	27/06/2015	09:00	Mon	29/06/2015	18:00	BN		Conf
CHESABAR00033	Chesapeake Bar Association Inc	Mon	29/06/2015	09:00	Tue	30/06/2015	18:00	BN		Conf
MOMA100012	Museum of Modern Art	Mon	29/06/2015	09:00	Tue	30/06/2015				Conf
GOLDMAN00004	Goldman, Sachs & Co.	Wed	12/08/2015	08:00	Sun	16/08/2015				Conf

Sequence: Out Date and Time Find [Delivery Date]

Scope:
 Quotes Rentals Booked Choose your location All d...
 Light Pencil Sales Pull
 Heavy Pencil Sub hire Out
 Confirmed Open hire Returned
 Cancelled Transfers

Data to View: Current Archive

Location: 0 - Toronto, 1 - New York, 2 - Florida, 3 - California, 4 - Texas, 5 - London, 6 - Toronto Ritz Carlton, 7 - Toronto Hilton, 8 - NY Courtyard Newark Downto...

Filter on this Location

All Operator: Rp Salesperson Project Manager Location: 0 - Toronto

Freight

The freight section allows for setup of the various pickup/delivery options offered to clients when booking equipment & services. Shipping costs are calculated against a base rate where the weight of the equipment on the booking can also be considered.

Setup Freight

Click on the Freight option in the setup menu.

A freight setup window will display where you can enter multiple freight options. RentalPoint allows you to have several services for the one freight type. For example, you may ship using a local courier, so you would enter 'Local' in the description column. The local courier may have different options such as 'Regular', 'Express' or 'Overnight'. Each of these options can be added as a different line in the freight setup. When you select the freight in the booking, the options will be merged together, so you don't see duplicates. This approach provides operators the option of selecting different freight options for different scenarios such as:

- Addressing multiple distances traveled
- Having preferred rates for customers
- Varying levels of priority in shipping

There are several rates that can be set according to weight loaded onto the truck. If weight figures have been entered for your products, RentalPoint will calculate the weight of the booking being loaded onto the truck. Thresholds can be set to charge varying rates based on how much weight is being loaded onto the truck. This option, combined with multiple services gives considerable flexibility in charging for freight.

- Base Rate is used to calculate freight charge up to maximum weight entered
 - with a base rate of 7.5 up with a maximum weight of 10Kg - freight will be calculated at \$75
- Rate Per Unit (RPU) will add an additional charge for each unit above the maximum weight to the next weight threshold

There are also freight defaults that can be specified. When a new booking is created, the defaults will come from here.

Please note, once you have created a Freight item you can rename it but not delete it.

RP# Setup Freight


#	Description	Service	Our truc	Zone	ase rate	Location
1	UPS	Air Next Day	No	0	0.00	All Locations
2	Irish Air	Road	No	0	0.00	All Locations
3	English Air	Air	No	0	0.00	All Locations
4	Box Truck	Road	Yes	0	75.00	All Locations
5	Van	Road	Yes	0	25.00	All Locations
6	Van	Rail	No	0	0.00	All Locations
7	The Customer	UPS	No	0	0.00	All Locations
8	The Customer	Truck	No	0	0.00	All Locations
9	MYTEST	Testing the ler	No	0	0.00	All Locations
10	abcdefghijklmno	test	No	0	0.00	All Locations
11	The Customer	Rail	No	0	0.00	All Locations

Important information, please read the following :
 In a multi location system freight options are assigned to a specific Location. Once these freight options have been used you will not be permitted to change the Location of them. You will need to insert a new freight record and assign it to the desired Location. The default freight method can be set from the Setup --> Locations area.


Enable Default Built-in Methods
 Del via "We Deliver" is default
 Delivery via customer is default
 Return via "We Pickup" is default
 Return via customer is default


Now that freights have been added to the system they can be selected from the venue tab. Depending on the selection of delivery and return options, the venue tab will calculate the freight charge and update the freight charge on the equipment tab.

RP Modify booking

Out 03/28/18 0900 In 03/29/18 1800 MYTEST00069 Location  Toronto


Customer | Calendar | Equipment | Crew | Venue | Notes | Payments | Attachments | Other Details | Status

Delivery via  UPS Service Air Next Day Zone 0 Our number Their number Total Weight 43.42560 lbs

Return via  Customer Service Zone 0 Our number Their number Total Volume 34.15260 Cubic feet

Insurance Value 2,451.00

Installation Instructions




Room | Freight | Floorplan

Multi Location Freight

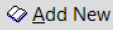
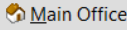
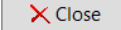
Setting up freight options in a multi location system is slightly different than a single location system. When using the multi location module, you'll notice a new column in the freight setup named Location. You can set freights to all locations or a specific location.

To set freight defaults you'll need to go to Setup, then Locations. At the far right end of the grid there are defaults for delivery and return.

RP Setup Location 

Company #	SMTP Address	SMTP Port	SMTP Encryption	Default Delivery	Default Return	Template Directory
			Not used	We Deliver	We Pickup	E:\Customer Data\Sweetwater\Templates
			Not used			
			Not used			
			Not used			
			Not used			
			Not used			
			Not used			
			Not used			
			Not used			
			Not used			
			Not used			
			Not used	We Deliver	We Pickup	
			Not used			

< >

 Add New  Main Office Locations cannot be deleted once they are added. Double click to edit a Location.  Close

When creating a booking, PO, cross rental or transfer, the freight options will display based on the location selected.

Tax Authorities

The Tax Authorities section of RentalPoint helps you maintain all the taxes used throughout the system. Please do not change the values of tax Exempt. If a customer is not charged tax, this is the only tax authority you can use.



Divisions

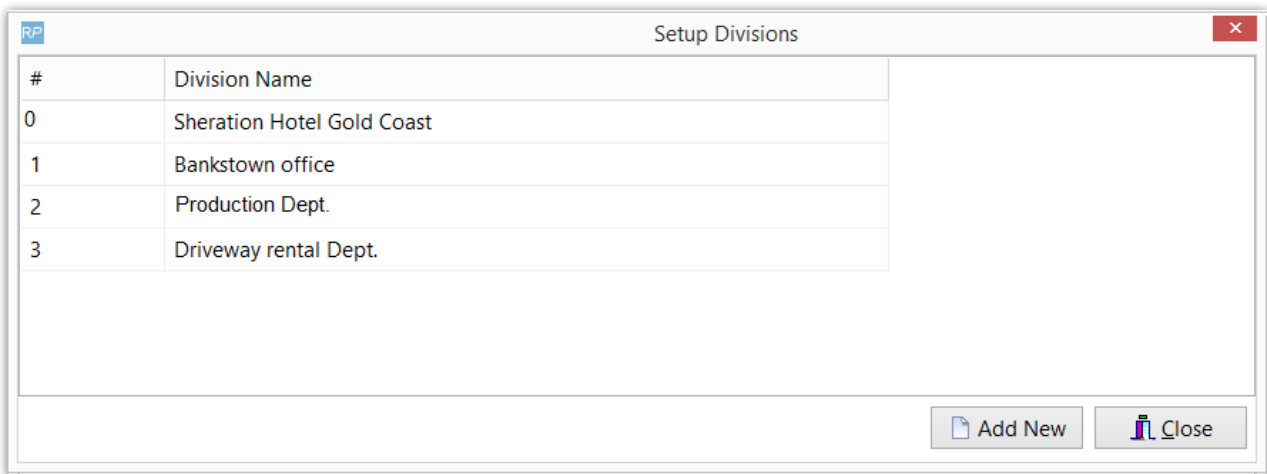
Divisions are useful to distribute and track revenue in different departments. For instance if you have a sound department and a lighting department specifying a division on bookings will allow reporting on a specific department.

Revenue Separation

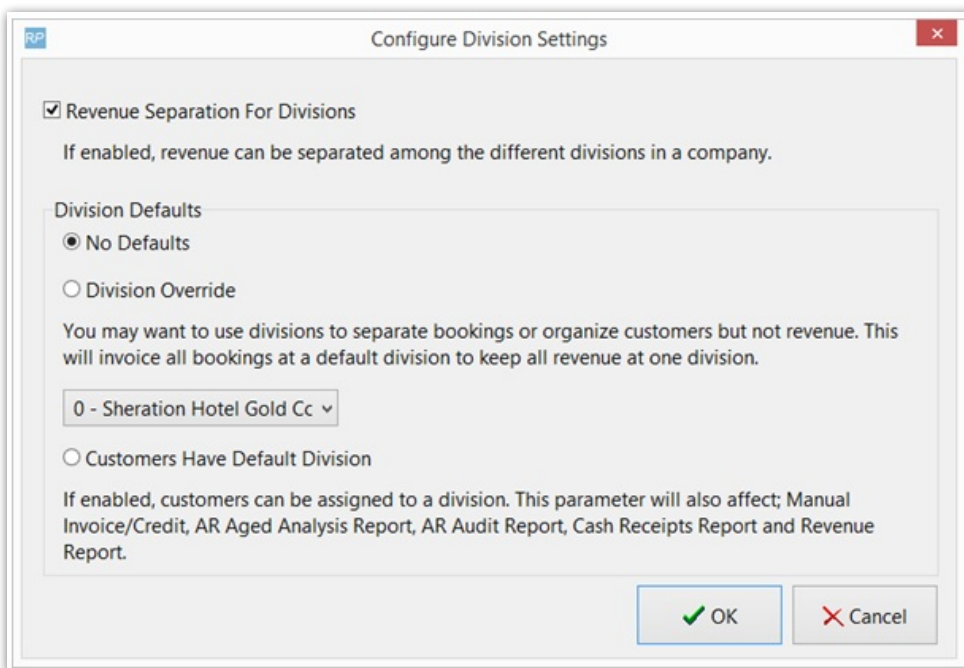
Divisions are used to separate income from bookings into a specified division or department of a company. A division is selected at the booking level. When a booking is invoiced, the invoice uses the division from the booking. When the invoice is paid, the payment uses the division from the invoice that it is applied to. Using divisions does not affect the booking in any way, it only affects reports and accounting activities after the booking is invoiced. Reports in RentalPoint, such as statements and account receivables, sort revenue by division. Divisions are not mandatory and are only something to be considered if you require more organized income separation.

To create divisions click the Division option within the setup menu. *Once a division is saved in the system it can be edited but not removed.*

A setup window displays with a blank list. To add more divisions click Add New. Once the desired divisions are added, they will be displayed. RentalPoint will need to be restarted for the settings to take effect. The divisions will be available in bookings under the Other Details tab.



To use divisions you'll need to enable **accounts parameter #24**.



Customers have default division

If you want certain customers to have a default division so that any bookings for that customer will automatically have the correct division selected you can enable **accounts parameter #30**. Additionally any **pre-payments** entered for the customer will be allocated to the customer's division before being assigned to a specific invoice when the payment will be applied to the division the invoice was generated for.

You can then select a division for each customer on the **Others** tab of customer properties. This division will then be filled in for any new booking entered for the customer.

Customer Maintenance

Address Financials Credit Card Others Notes Fields Attachments

Industry Type: EVENTS Purchase Order Number Required

Industry Description: Event Planning Company Customer Has Custom Template List

Campaign / Source:

Division: 2 - Production Dept.

Customer Number: only as an interface to certain accounting systems

Last Booking No.:

0 - Sheraton Hotel Gold Coast
1 - Bankstown office
2 - Production Dept.
3 - Driveway rental Dept.

To add a "Division" filter to the main booking window


In the main setup window, click on "Custom viewing", then check "Division" as below -

RentalPoint Custom Viewing Options

Booking Grid User Interface Customer Information Venue Information






Invoice # Venue Booking Type Date Added

Confirm Date Crew Status Original Operator Event Type

PO # Salesperson Division 

Invoiced Status Revenue Project Manager

This will then add a filter to the main booking window so you can filter on division, as below -


	ADVENT00001	Adventure Tours and holidays	Mon	23/01/2017	09:00
	BRID3600001	Bridges Data Systems Inc	Tue	14/02/2017	09:00
	AVBRIDG00004	Audio Visual Bridges Data Systems Inc	Sun	19/03/2017	09:00
	DELO6100001	Deloitte & Touche	Tue	4/07/2017	08:00
	3M-CAN00007	3M CANADA PTY LTD	Tue	25/07/2017	00:01
	DOME10200001	Dome Lights Australia	Sat	16/09/2017	09:00

Sequence: Out Date and Time

Scope:

<input checked="" type="checkbox"/> Quotes	<input checked="" type="checkbox"/> Rental	<input checked="" type="checkbox"/> Booked	<input checked="" type="checkbox"/> Invoiced
<input checked="" type="checkbox"/> Light Pencil	<input checked="" type="checkbox"/> Sales	<input checked="" type="checkbox"/> Pull	<input checked="" type="checkbox"/> Uninvoiced
<input checked="" type="checkbox"/> Heavy Pencil	<input checked="" type="checkbox"/> Sub rental	<input checked="" type="checkbox"/> Out	<input checked="" type="checkbox"/> Complete
<input checked="" type="checkbox"/> Confirmed	<input checked="" type="checkbox"/> LT rental	<input checked="" type="checkbox"/> Returned	
<input checked="" type="checkbox"/> Cancelled	<input checked="" type="checkbox"/> Transfers		

Find:

Division:  All Divisions

Data to View: Current Archive

List Plot Sheet Projects

Select the primary scope: All Operator: Tim Sale

Revenue Report By Division

RP Revenue Report

Customer
 All
 Customer

Salesperson
 All
 Salesperson

Show
 All
 Show

Source/Campaign
 All
 Source/Campaign

Location Scope
 All
 Location

Division
All Divisions
All Divisions
0 - Sheraton Hotel Gold Coast
1 - Bankstown office
2 - Head office
3 - Driveway rental Dept.

Profit Analysis Report

RP
Profit Analysis Report

Step 1. Select a Major Scope

Set

All Bookings

List of Bookings

Customer

Industry Type

Project

Project Manager

Salesperson

Showname

Division

Event Type

Source / Campaign

Division

2 - Production Dept. ▾

0 - Sheraton Hotel Gold Coast

1 - Bankstown office

2 - Production Dept.

3 - Driveway rental Dept.

Step 2. Select Additional Options

Date Scope

All Dates

Selected Dates (WH Out Date)

Start Date (inclusive) 📅

End Date (exclusive) 📅

Jan
📅

Feb
📅

Mar
📅

Apr
📅

May
📅

Jun
📅

Jul
📅

Aug
📅

Sept
📅

Oct
📅

Nov
📅

Dec
📅

Default Standard Operating Cost %

Sub rental Cost Estimate

Use Actual Values

Use Estimated Value Below:

PO/Sub rental Value to Use:

Gross (includes taxes)

Net (excludes taxes)

Booking Status Scope

All

Selected Status

Quote

Light Pencil

Heavy Pencil

Confirmed

Cancelled

Invoiced

Print Report Sections

Tabular Data

Single line per booking

Trucks

In this area you can set up your company trucks as well as their weight and size capacities. RentalPoint uses the trucks you set up when scheduling a delivery or pickup. When scheduling bookings on a truck, the associated license plate and expiry date displays on screen. The system notifies users if a plate is expired at time of scheduling.

Please note, once you have created a Truck you can rename it but not delete it.





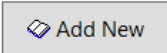
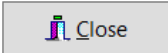
Public Holidays

The system warns an operator if a booking is scheduled for delivery or return on any of the Public Holidays setup in the system. Bookings may still be processed but the system only issues a warning. Operational Parameter #42 must be enabled.

Public Holidays can be customized based on your requirements. These holidays may affect bookings, labour, equipment delivery and equipment pickup. The system will not prevent you from performing your normal actions. However, if Operational Parameter #42 is enabled (Warn if Public Holiday on Delivery), then the system will warn the operator that they are scheduling a booking that overlaps a holiday. The system will also display holidays in green in the plot sheet.

To configure public holidays in RentalPoint click the Public Holidays option in the setup menu. Once selected, you will be prompted with a window in which you can enter any day as a holiday. Since holidays can fall on different days from year to year the system requires that you enter an exact date the holiday falls on year by year.

Date	Description [35]	Location
7-1-2017	Canada Day	All Locations

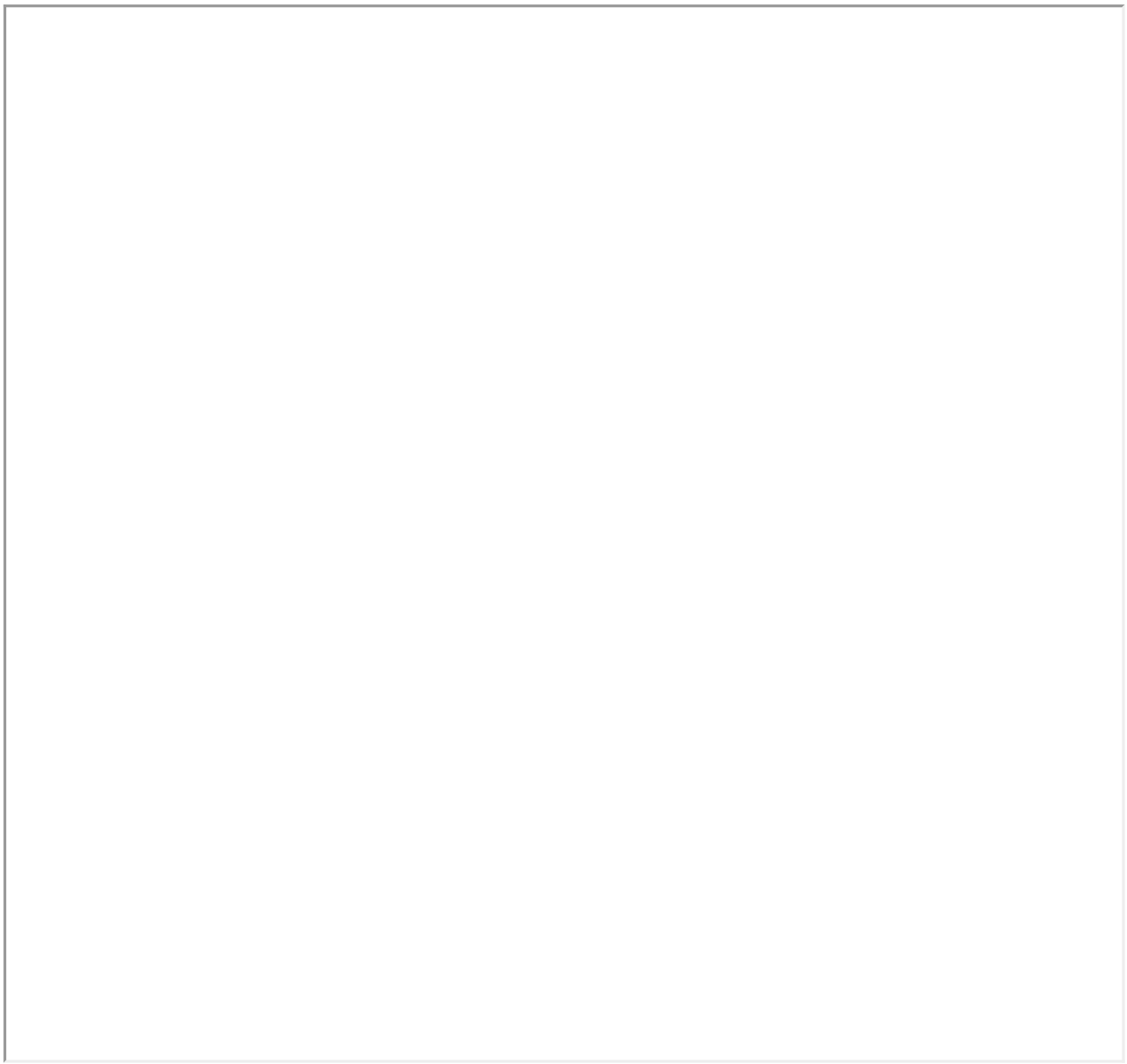
 

Please note, once you have created a holiday you can rename it and change the details but you may not delete it.

Pricing

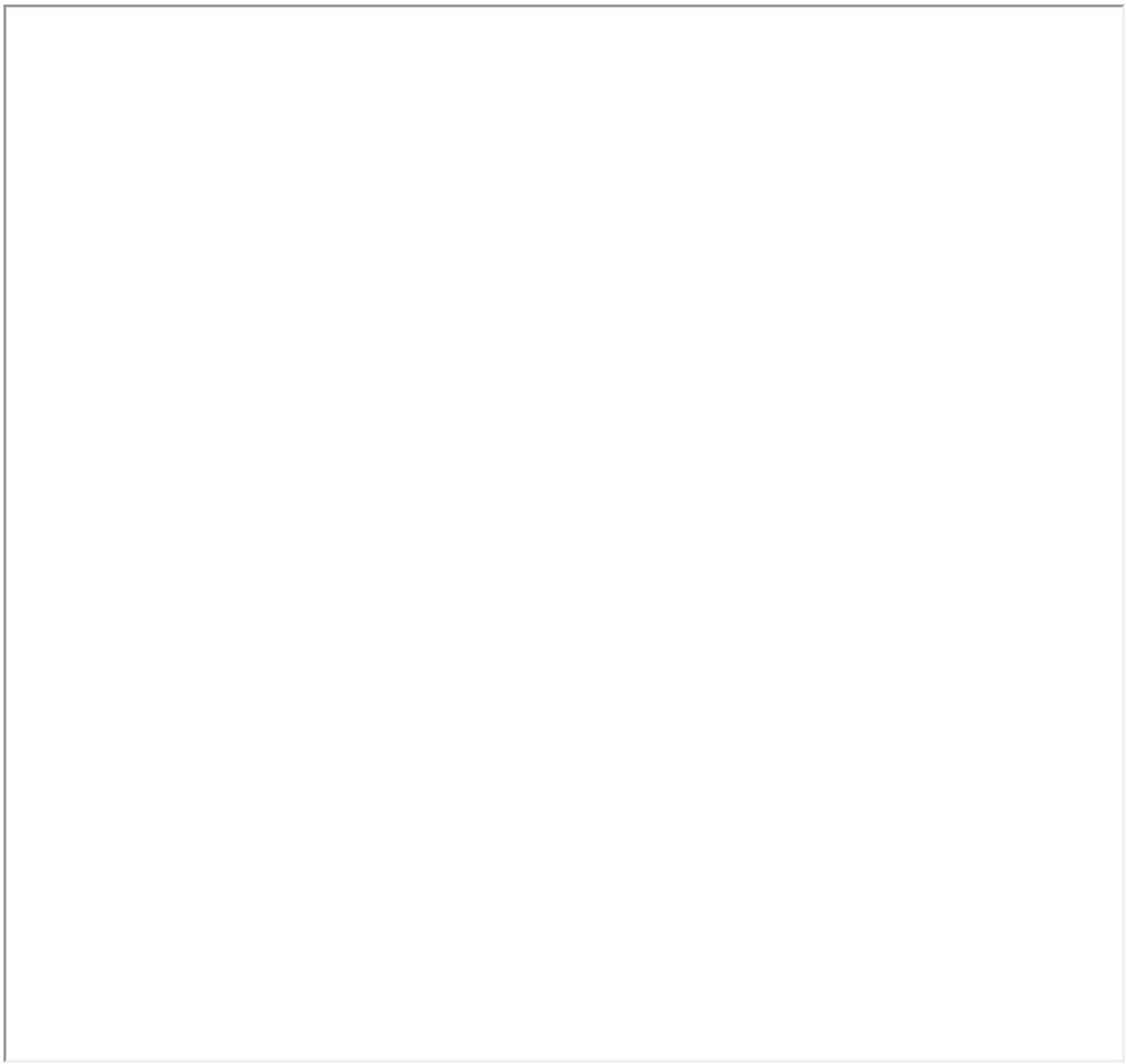
Parameters





Price Factor Tables and Price Sets





Multi Rate





Show Line Item Days in Booking

Enabling this option will allow the number of days to be modified for each line as needed.

The days entered will either be the "days using" or the "days charged" depending on the pricing scheme you are using. Days using will only permit the entry of full days while days charged will allow fractions of a day. The following pricing schemes are compatible with the line item days option. Default pricing (First day rate / weekly rate / long term rate) First day / extra day Price factor tables Flat days charged Can be enabled from the price factor table area or pricing parameter #33.

Parameter Notes

Show Line Item Days in Booking

This option displays a days column in the equipment grid of a booking. Users can edit each item and modify the days to a custom charge.

This option is compatible with the following pricing schemes:

- Default pricing (first day rate / weekly rate / long term rate)
- First day / Extra day
- Price factor tables
- Flat Days charged (Note : days will be the days charged in this case)

The dialog box is titled 'Enter Value' and contains a section for 'Show Line Item Days in Booking'. It features two radio buttons: 'Yes' (which is selected) and 'No'. To the right of the radio buttons are two buttons: 'OK' with a green checkmark and 'Cancel' with a red X.

The screenshot shows the 'Modify booking' window with a table of equipment items. A red arrow points to the 'Days' column header. The table has columns for Code, Description, Quantity, Avail, Short, *Cross rental, Prep Qty, Quick T/A, Unit Rate, Days, Price, Stat, C, and W.

Code	Description	Quantity	Avail	Short	*Cross rental	Prep Qty	Quick T/A	Unit Rate	Days	Price	Stat	C	W
heading 1 Out:06/15/18 @ 09:00 In:06/16/18 @ 18:00 Days : 1													
EON510	10" Powered Speaker - JBL TEST	1	WMute		0	0	0	45.00	0	45.00	Sng		
B0602	5' Section - 37.5lbs.	1	30	0	0	0	0	50.00	0	50.00	Sng		
test Out:06/15/18 @ 09:00 In:06/16/18 @ 18:00 Days : 1													
MSR100	8" Powered Speaker - Yamaha MSR100	1	OK		1	0	0	10.00	0	10.00	AIRPUSHOOC		
B0702	5' Section - 35lbs.	1	25	0	0	0	0	0.00	0	0.00	Sng		
LES3	Install product	1	212	0	*5.39	0	0	8.75		8.75	SngS		

Effective in v11.1.8 and higher

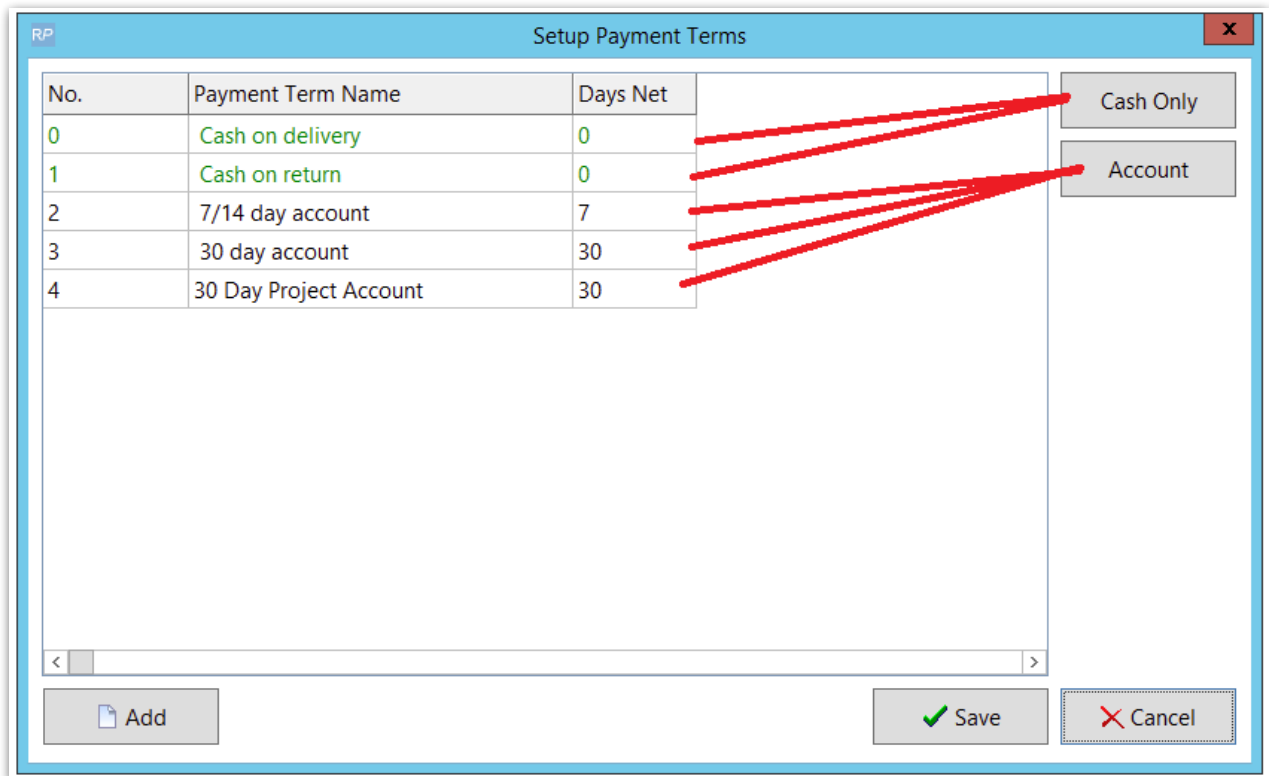
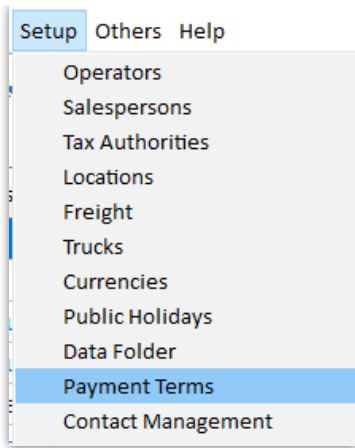
1. Pricing #3 Charge For Sundays. If Price Factor Tables are enabled, then the user can decide if they want the first Sunday free or all Sundays free.
2. Pricing #3 will now apply to Pricing #55 Multi Rate Pricing Scheme.

Payment Terms/Customer Account Type

Payment Terms configure the payment intervals for customer accounts. Once created, payment terms can be used for any customer or booking. RentalPoint offers a default setup of 4 account types:

- Cash on delivery
- Cash on return
- 7/14 day account
- 30 day account

If these terms are not to your requirements, click the Payment Terms option in the setup menu to add your own custom terms.



Once the Term and the Days Net have been added, click either OR , then click Save.

You'll need to log out of RentalPoint and back in again before seeing the new payment terms in the Financials tab of a customer record.

Once you've created a Payment Term you can rename it and change the details (i.e. days Net or Cash Only/Account) but you cannot delete it.

The payment term is used against the customer account type when setting up customer details

Customer Maintenance

Address Financials Others Notes Fields Attachments

Credit Status
 Credit Limit: 250.00
 Account Type: * Cash on delivery
 Allow/Stop: Allow credit
 Payment Method: []

Tax Details
 Exempt No.: []
 Rental Tax Exempt
 Tax Authority #1: MCTD Surchrng
 Tax Authority #2: Exempt

NOTE: When invoicing a Project, taxes from the customer being invoiced will override any and all taxes entered on the bookings within the Project.

Payment Terms for Multiple Invoicing: <none>

Account Manager: []

Payments in the last 30 days: 0.00

Account Balances
 Current: 0.00
 30 days: 0.00
 60 days: 0.00
 90 days+: 0.00
 Total Outstanding: 0.00

Last Payment
 Date: 1-1-1980
 Amount: 0.00

Invoices and Payments

Other Information
 Rental Price Set Customer Pays: Standard price
 Sales Price Customer Pays: Retail
 Rental discount rate %: 0.00000
 Damage waiver: None

[New] [Edit] [Delete] [Save and Close] [Save] [Cancel]

Payment Terms can also be set on a per booking basis if required.

RP Modify booking

Out 06/15/18 0900 In 06/16/18 1800 MYTEST00054 Location 0 - Toronto

Customer Calendar Equipment Crew Venue Notes Payments Attachments Other Details

Payment
 Payment Terms: 30 day account
 Payment Options: Prompt for Payment on Invoicing
 Payment Method: [] Surcharge %: 0.00

Terms for Multiple Stage Invoicing: <none> Default

Balance
 Total Price: 376.10 Minus Pre-payments: 0.00 Balance: 376.10
 [Enter a Pre-payment]

Miscellaneous Costs

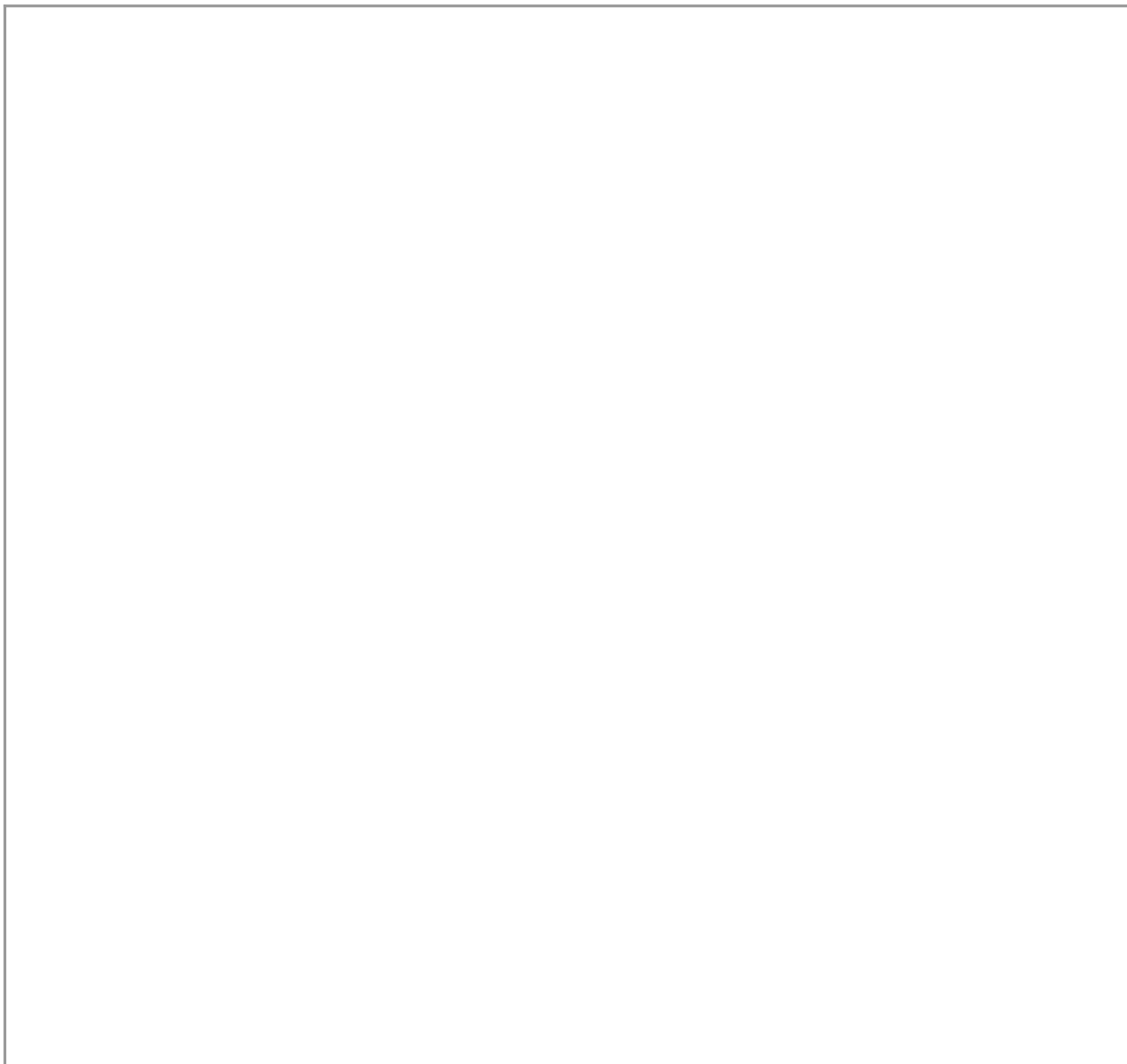


The options below only apply to systems with the Multi-location module

Locations

This area allows you to set up different locations for your company. Locations are useful to track inventory, revenue and bookings. Click Add New to add a new location to your company. To set up a main office for your company highlight the location that you would like to use and click Main Office.



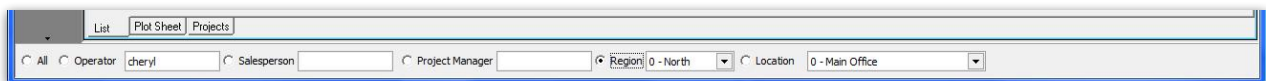


Regions Setup

Used in conjunction with Locations, regions are used to group specific locations together. A company with 4 locations, 2 in Eastern Timezone and 2 Pacific Timezone, might create an Eastern and Pacific region, then slot the relevant locations under each region.

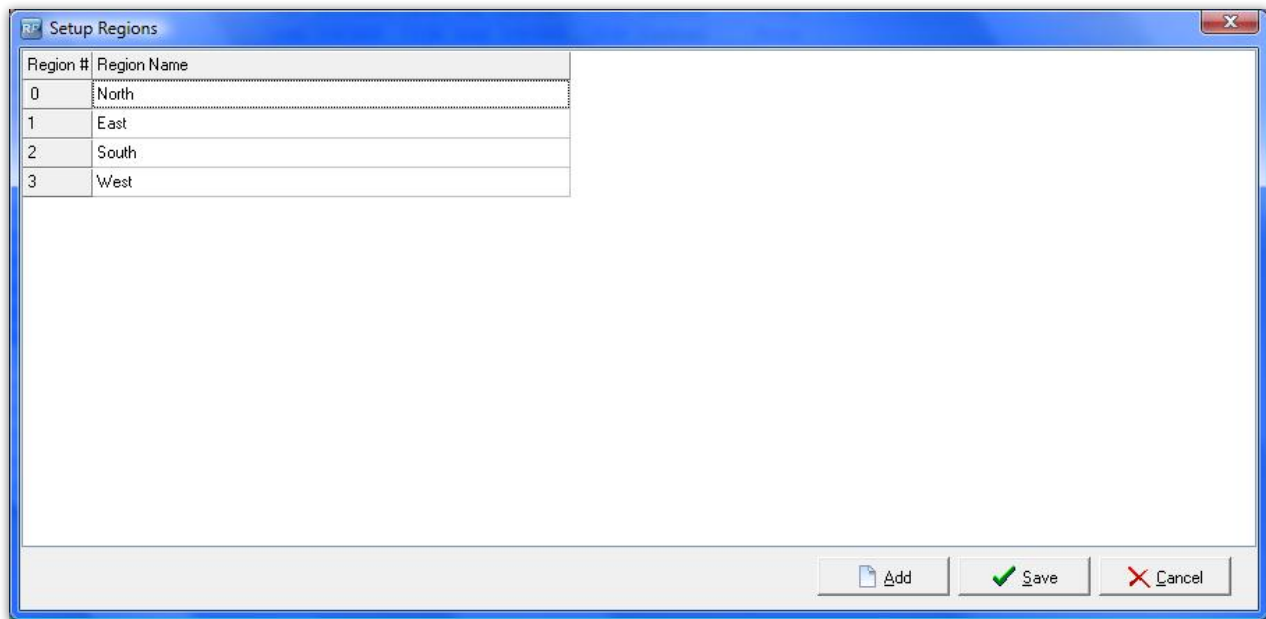
To use the regions functionality it must first be enabled. Go to the Parameters option of the setup menu. Open Operational #174 - Enable Region Support. Set this to Yes and restart RentalPoint.

Once you have restarted RentalPoint, the option for adding regions will be enabled. When RentalPoint is run again you will notice a region scope option at the bottom as well as a new option under the setup menu that allows you to configure regions.



To configure the regions, select the Regions option from the setup menu. By default the system

will create a region for you, you can change the name to make it more descriptive. Once a Region has been added to the system it can be renamed but not deleted.



After entering Regions, go into Setup Locations and assign each of your locations to a Region.

Please note, once a Region has been created, you can rename it but not delete it. Bookings and other information in the system will still be linked to the region for reporting information.

Scope and Searching

The secondary scope in RentalPoint can also be sorted by regions. If you select a region from the secondary scope, any bookings that are assigned to that region, or to the locations in that region, are displayed. The secondary scope applies to other areas of RentalPoint, including the Shortages List, Products, and Purchase Orders.

When creating a booking, you can select a region from the list. Only the locations associated with that region display in the location drop down list.

Equipment Availability

Searching for equipment based on a region is quick and easy. Enabling Operational Parameter #127 – Equipment Search Location Sensitive displays an extra search tab in the equipment grid of the booking. Select the region, then continue entering your equipment as normal. Availability is based on location but the tree view and the search are based on the quantities in the region.

Technicians

When entering a technician, the region in which they work can be specified. Then when a booking is created only those technicians that work in the region specified in the booking can be selected.

Custom Printing

When printing custom templates throughout the system, you can specify region specific templates. For example, your Eastern region may have different printouts than your Western region. Using the custom printing option, you can easily organize your templates, so the Eastern region does not accidentally use a Western region template.

Reports

Several reports in the system, such as the Booking Cross Section, Invoice Register and Revenue Report can be sorted by regions, making accounting duties much more simplified.