

RentalPoint Initial Setup

Last Modified on 22/05/2026 11:46 am EDT

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...

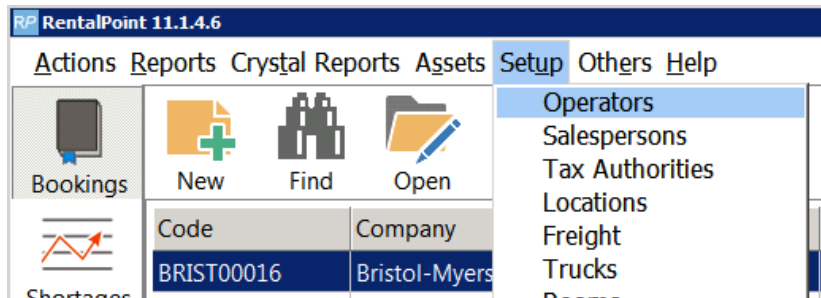
Below are the items that you'll need to set up before you start entering orders, click on the links to view detailed instruction for each item.

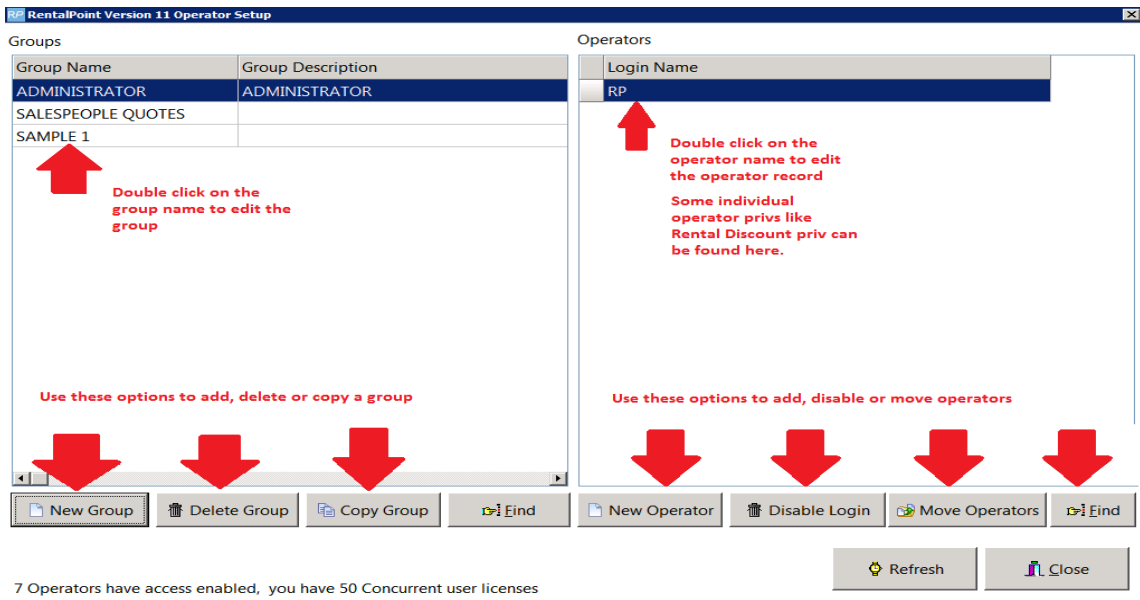
Operator & Operator Groups

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).

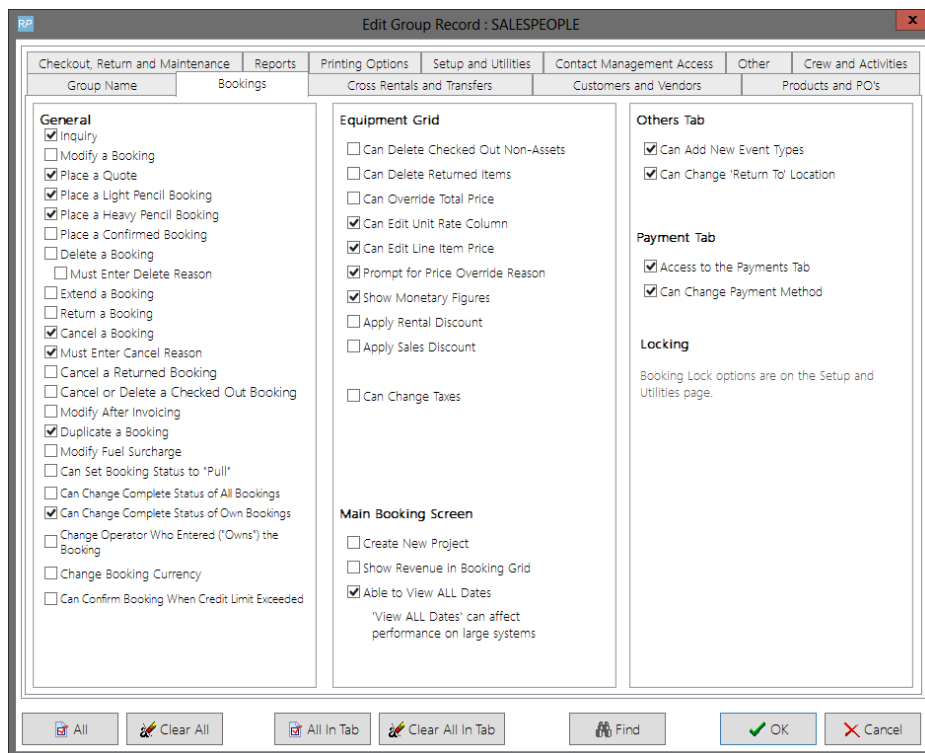
Managing Operator Groups

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



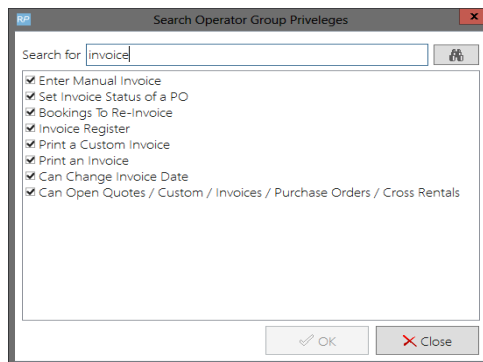


- Grant rights to the group by ticking the boxes in the appropriate tabs. Click **OK** to save your changes.



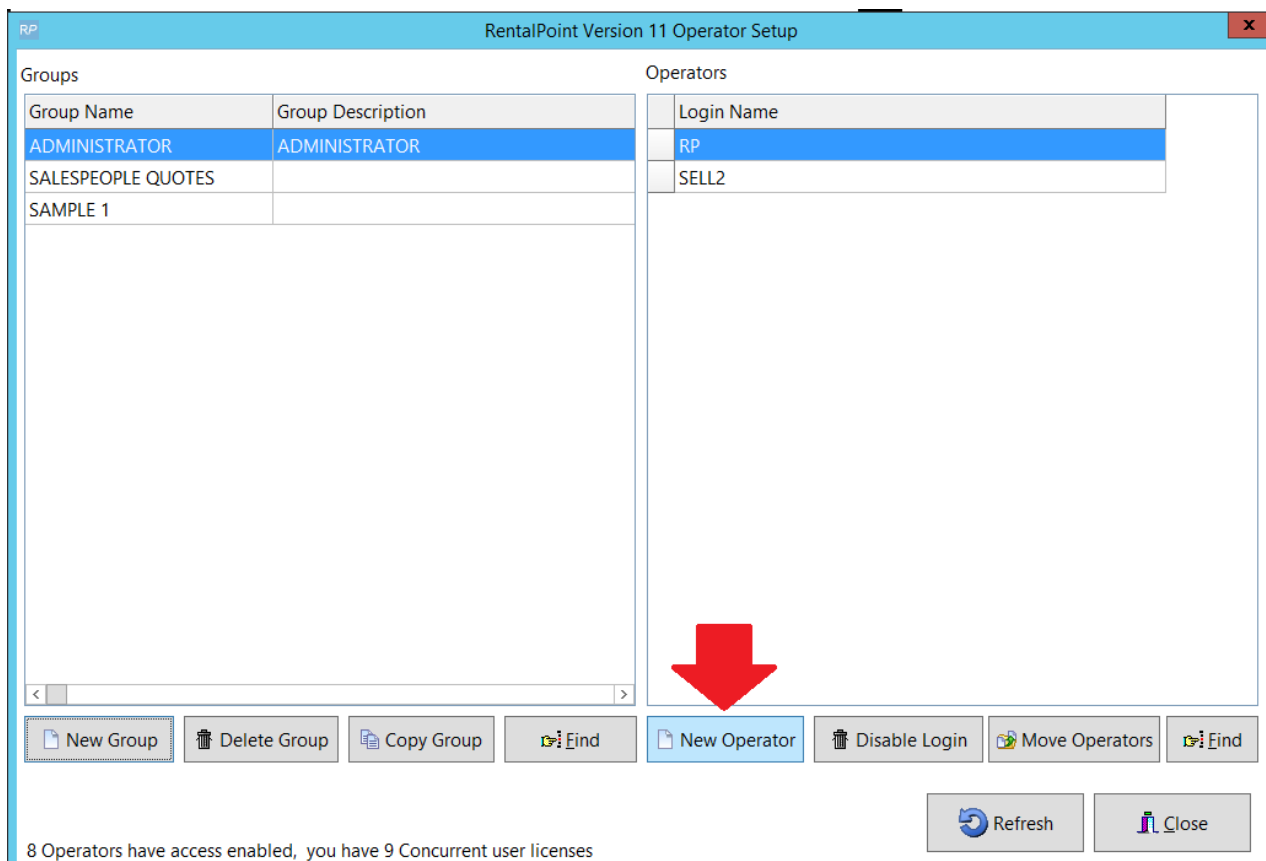
- If you can't find the privilege you're looking for, try the **Find** option. Type the privilege that

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'



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 RentalP

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	Rental
MYTEST00024	mytest		Fri	2017-04-21	10:00	Rental
BCUST00001	B Company		Tue	2017-04-25	08:00	Rental

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 [Satellite]

Default Division

Default Salesperson

Default Project Manager

Email settings

Email Address

SMTP Address(Host)

SMTP Port SSL/TLS

My smtp server requires authentication

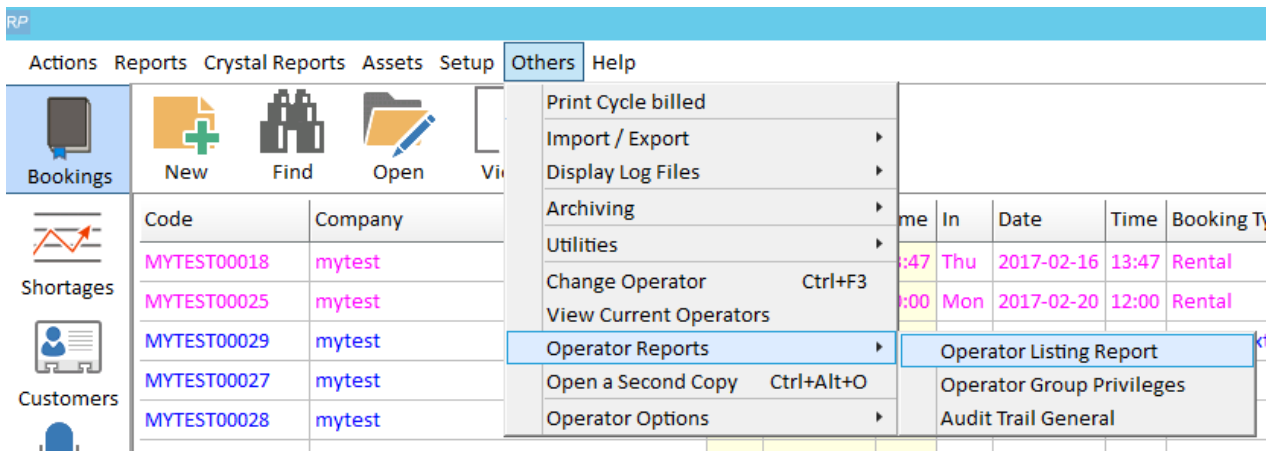
Booking Product Treeview Options

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

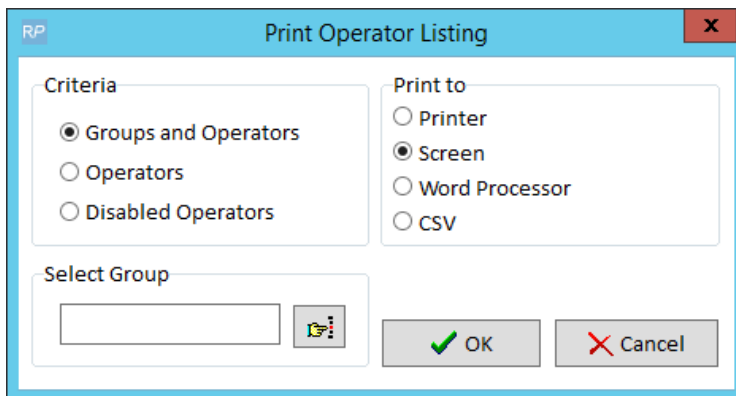
Operator Listing and Other Reports

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.



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.

- Group Name
- Bookings
- Sub-Hires
- Transfers
- Customers and Vendors
- Products and PO's
- Checkout, Return and Maintenance
- Reports
- Printing Options
- Setup and Utilities
- Contact Management Access
- Other
- Crew and Activities
- Booking Scope

<p>Setup</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Set up Payment Terms <input checked="" type="checkbox"/> Set up Salespersons <input checked="" type="checkbox"/> Set up Freight <input checked="" type="checkbox"/> Set up Trucks <input checked="" type="checkbox"/> Set up Rooms <input checked="" type="checkbox"/> Set up Tax Authorities <input checked="" type="checkbox"/> Set up Divisions <input checked="" type="checkbox"/> Set up Currencies <input checked="" type="checkbox"/> Change Setup Parameters <input type="checkbox"/> Reset Parameters <input checked="" type="checkbox"/> Can Remove Parameter Setup Lock <input checked="" type="checkbox"/> Set up Locations <input checked="" type="checkbox"/> Can Disable Login Access <input checked="" type="checkbox"/> Edit Operator Access Privileges (this) <input checked="" type="checkbox"/> Set up Expense Codes <input checked="" type="checkbox"/> Set up Miscellaneous Costs <input checked="" type="checkbox"/> Set up Cancellation Reasons <input checked="" type="checkbox"/> Setup Activities <input checked="" type="checkbox"/> Setup Multi Location Operator Groups <input checked="" type="checkbox"/> Set up Target Margins <input checked="" type="checkbox"/> Set asset stop date 	<p>Utilities</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Format Phone Numbers <input checked="" type="checkbox"/> Re-load Stored Procedures <input checked="" type="checkbox"/> Account Export <input checked="" type="checkbox"/> Import Account Balances <input checked="" type="checkbox"/> Can Upgrade Data Files <input checked="" type="checkbox"/> Display Log Files <input checked="" type="checkbox"/> Import Files <input checked="" type="checkbox"/> Product Setup Utilities <input checked="" type="checkbox"/> Can Change Attachments Document Path <input checked="" type="checkbox"/> Archive Old Data (Bookings, Documents, POs) <input checked="" type="checkbox"/> Unarchive Bookings <input checked="" type="checkbox"/> Purge Old Data (Bookings, Customers, Products) <input checked="" type="checkbox"/> Can Use Excel Query Builder <input checked="" type="checkbox"/> Can Use Quickbooks Online Integration <hr/> <p>Locking</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Can Create Admin Lock <input checked="" type="checkbox"/> Can Remove Admin Lock <input checked="" type="checkbox"/> Can Unlock a Booking (while being modified) <input checked="" type="checkbox"/> Can Lock/Unlock Booking for Scanning in Checkout <input checked="" type="checkbox"/> Can Lock/Unlock Sub-Hire for Scanning in Checkout <hr/> <p>Log in</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Can Change Password <input checked="" type="checkbox"/> Can Change Operator Defaults
--	--

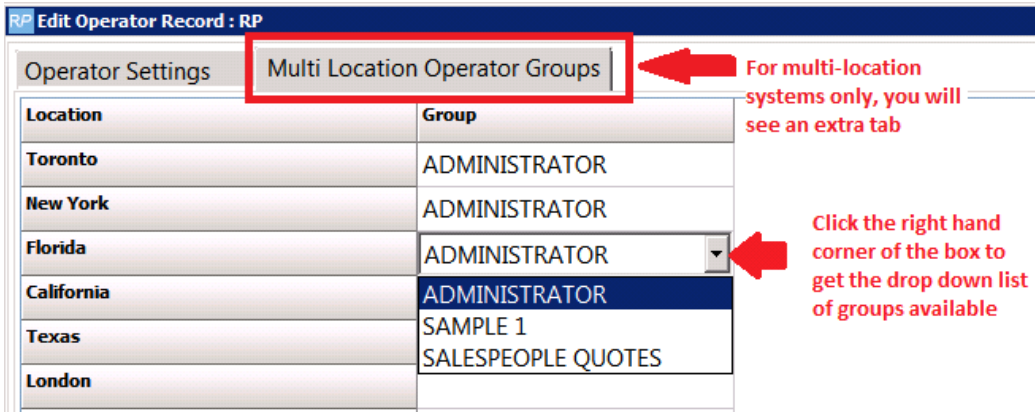
- All
- Clear All
- All In Tab
- Clear All In Tab
- Find
- OK
- Cancel

RentalPoint Version 11 Operator Setup

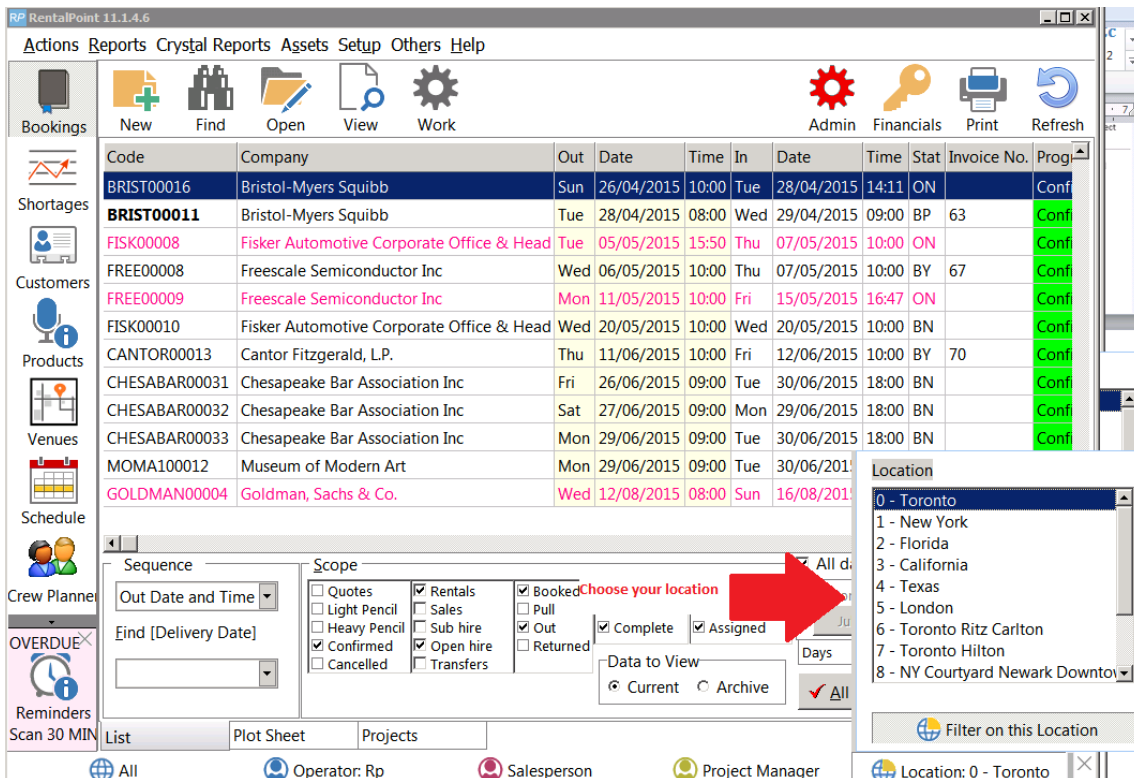
Groups		Operators
Group Name	Group Description	Login Name
ADMINISTRATOR	ADMINISTRATOR	RP
SALESPeOPLE QUOTES		
SAMPLE 1		

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

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



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



Freight Overview

Freight can be recorded against a booking either...

- Manually on the booking equipment tab and/or
- Using predefined freight on the booking freight tab. Using this option freight is set up outside the booking (usually during initial data setup) and selected on the freight tab during booking entry.

Pricing Parameter #24 defines how freight is entered on the booking

- Single Freight Charge

Total Hire	298.89
Del/pickup	108.00
Inst/Operator	600.00

- Delivery, Collection, Fuel Surcharge (fuel surcharge is across all bookings and is entered when setting the parameter)

Total Hire	298.89	Hire discount @ rate	0.00	0.00000 %
Del/pickup	54.00	Fuel Surcharge @ rate	0.00	0.00 %
Collection	54.00			
Inst/Operator	600.00			

- Fuel Surcharge and 'Allow Manual Entry of Freight' preferences are set in the same parameter. Freight can also be locked, left unlocked or only locked when a booking is confirmed via Pricing Parameter #25

RentalPoint Version 11 Parameter Setup

Company Name	Accounts	Invoicing	Cust
Pricing Setup	Operational Setup	Custom Viewing	Wor
Web and Email	Select Pricing Parameter		
	24. Freight Charge Breakdown		
	25. Freight Price Lock Default		

Manual Freight Entry

When activated, users can choose to manually enter freight on the Equipment Tab of a booking (per screenshot below). It's important to note that the freight tab is still available and any freight

entered under the freight tab of the booking will supersede manual freight entry. This freight cost makes up part of the booking total price.

To activate this option set 'Allow Manual Entry of Freight = YES' in Pricing Parameter #24

The screenshot shows the 'Modify booking' window for booking SHAW88900025. The table below lists the equipment items:

Code	Description	Quantity	Avail	Short	*Cross rental	Prep Qty	Quick T/A	Unit Rate	Days	%disc	Price	Stat	C	W
MONR	Monitor rack	1	1	0	0	0		175.00	1.00	0.00	175.00	Sng		
BENQ	Benq widescreen	2	In Rack					175.00	1.00	0.00	350.00	prt		
WCTL	Wireless Camera Tally Light	1	2	0	0	0		123.89	1.00	0.00	123.89	Sng		

The summary panel at the bottom shows the following values:

- Total Hire: 298.89
- Del/pickup: 100.00
- Collection: 100.00
- Inst/Operator: 600.00
- Actual Cross rental: 0.00
- Sub total: 1,098.89
- Exempt: 0.00
- GST: 81.93
- Total Price: 1,180.82 CAD

Predefined Freight - The Display Window

The screenshot shows the 'Setup' menu with the following options:

- Operators
- Salespersons
- Tax Authorities
- Regions
- Locations
- Freight** (highlighted with a red arrow)
- Trucks

The freight setup window displays differently based on parameter settings.

- When **Pricing Parameter #24** is set to 'Allow Manual Entry of Freight'
 - One charge for freight will be entered on the booking
 - The freight window displays as below
 - Region and Location fields display for multi-location systems only.

RP Setup Freight

#	Description	Service	Our truck	Zone	Base rate	Region	Location
1	UPS	Regular	No	0	1.50	All Regic	All Locat
2	ups	Express	No	0	50.00	All Regic	All Locat
3	UPS	Regular	No	1	3	All Regic	All Locat
4	UPS	Express	No	1	65.00	All Regic	All Locat
5	FEDEX	Ground	No	1	100.00	All Regic	All Locat
6	FEDEX	Ground	Yes	1	140.00	All Regic	All Locat
7	FEDEX	Air	No	3	69.00	All Regic	All Locat
8	OUR TRUCK	OUR TRUCK	Yes	0	3.00	All Regic	All Locat

Important information, please read the following :
 In a multi location system freight options are assigned to a specific region/Location. Once these freight options have been used you will not be permitted to change the region/Location of them. You will need to insert a new freight record and assign it to the desired region/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

- When **Pricing Parameter #24** is set to 'Allow Manual Entry of Freight' = NO
 - The freight window displays as below.
 - The parameter also sets either
 - Single Freight Charge
 - A combined charge is stored for delivery and collection
 - OR 'Delivery, Collection and Fuel Surcharge'
 - Separate delivery and collection charges are stored against the booking along with a fuel surcharge
 - With no manual entry permitted, shipping costs can be calculated using the base rate up to a specified weight, however for freight greater than the defined weight a higher charge can be applied using the Rate per unit entered against each weight threshold.
 - Region and Location fields display for multi-location systems only.
 -

#	Description	Service	Our truck	Zone	Base rate	> weight	Rate per unit	> weight	Rate per unit	> weight	Rate per unit	> weight	Rate per unit	> weight	Rate per unit	Region	Location
1	UPS	Regular	No	0	1.50	5.00	2.00	10.00	2.50	15.00	3.00	20.00	3.50	25.00	4.00	All Regio	All Locat
2	ups	Express	No	0	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat
3	UPS	Regular	No	1	3	5	8	10	10	15	12	15	20	20	All Regio	All Locat	
4	UPS	Express	No	1	65.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	
5	FEDEX	Ground	No	1	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	
6	FEDEX	Ground	Yes	1	140.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	
7	FEDEX	Air	No	3	69.00	23.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	
8	OUR TRUCK	OUR TRUCK	Yes	0	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	

Important information, please read the following :
 In a multi location system freight options are assigned to a specific region/Location. Once these freight options have been used you will not be permitted to change the region/Location of them. You will need to insert a new freight record and assign it to the desired region/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

Predefined Freight- Service, Our Truck, Zones

The Freight Setup window allows for configuration of multiple freight options for pickups and deliveries.

Referencing the screenshot below:

- Service is used to describe the type of service offered by the Freight description
- Our Truck is used to identify deliveries and returns that need to be tracked by the software in the Delivery & Return window
- Zones are used to denote distance to travel, so that the same service can be used to charge different rates for differing distances.

Below both a 'Regular' and an 'Express' service are set up for freight description UPS.

Each service covers two zones charged at different Base Rates and escalating rates per unit

Since 'Our Truck' is set to 'No', bookings using this freight option will not display in the Delivery and Return window as we don't need to track this freight in-house.

#	Description	Service	Our truck	Zone	Base rate	> weight	Rate per unit	> weight	Rate per unit	> weight	Rate per unit	> weight	Rate per unit	> weight	Rate per unit	Region	Location
1	UPS	Regular	No	0	1.50	5.00	2.00	10.00	2.50	15.00	3.00	20.00	3.50	25.00	4.00	All Regio	All Locat
2	ups	Express	No	0	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat
3	UPS	Regular	No	1	3	5	8	10	10	15	12	15	20	20	All Regio	All Locat	
4	UPS	Express	No	1	65.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	
5	FEDEX	Ground	No	1	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	
6	FEDEX	Ground	Yes	1	140.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	
7	FEDEX	Air	No	3	69.00	23.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	
8	OUR TRUCK	OUR TRUCK	Yes	0	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	All Regio	All Locat	

Predefined Freight - Rate Calculations

- **Base Rate**

Used to calculate the freight charge up to the maximum weight entered.

Example:

A Base Rate of 7.5 with a Maximum Weight of 10Kg results in a freight charge of \$75

- **Rate Per Unit (RPU)**

Applies an additional charge for each unit above the maximum weight threshold, up to the next configured weight range. From the setup shown in line 1 above:

- **Base Rate** = 1.5
- Weight breaks:
 - 5 lb → rate 2
 - 10 lb → rate 2.5
 - 15 lb → rate 3
 - 20 lb → rate 3.5
 - 25 lb → rate 4

The software analyzes as follows:

1. Starts with the **BaseRate**
2. Finds the highest matching weight break \leq booking weight (Use the highest weight tier that does not exceed the booking weight)
3. Adds:
 $\text{rate} \times (\text{weight} - \text{first break weight})$

For a booking weight of **20 lb**:

- First break weight = 5
- Matching bracket = 20 with rate 3.5

So:

$$3.5 \times (20 - 5)$$

$$3.5 \times (20 - 5) = 52.5$$

Then add the base rate:

$$52.5 + 1.5 = 54.0$$

$$52.5 + 1.5 = 54.0$$

- Fuel surcharge is applied to collection.

Example assuming:

- Collection = 54
- Fuel surcharge rate = 10%

• Then:

$$10\% \times 54 = 5.40$$

Total:

$$54 + 5.40 = 59.40$$

Using weight thresholds together with multiple freight services provides considerable flexibility when calculating freight charges.

Using weight thresholds together with multiple freight services provides considerable flexibility when calculating freight charges.

Predefined Freight - Default Built in Methods

Default freight settings can also be configured. These defaults are automatically applied whenever a new booking is created.

RP Setup Freight

#	Description	Service	Our trunc	Zone	Base 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	abcdefghijklmni	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

OK Cancel

Out 28/02/09 0800 In 28/02/09 1700 SPEN00028 Region 0 - EAST Location 0 - Toronto

Customer Calendar Equipment Crew Venue Notes Payments Attachments

Delivery via: Customer Service Zone Our number Their number Total Weight: 0.00000 lbs

Return via: Customer Service Zone Our number Their number Total Volume: 0.00000 Cubic feet

Calculated Delivery Charge (Freight Setup): 0.00
 Calculated Collection Charge (Freight Setup): 0.00
 Insurance Value: 0.00

Apply to booking

Installation Instructions

Predefined Freight on the Booking

Now that freight has been set up it can be used in bookings. If you haven't done so already, log out and back in again to see the latest freight setup.

When freight is selected on a booking, the software intelligently groups the related options together offering one freight option for matching descriptions with differing service and zone options for that description. This setup provides flexibility for operators to manage different freight scenarios, including:

- Charging based on varying travel distances
- Applying preferred freight rates for selected customers
- Offering different shipping priorities and service levels

For our example, UPS will appear once in the list with options under 'Service' for Regular and Express and options under 'Zone' for 0 and 1

Our number/Their number is simply a toggle showing who is paying for freight.

- Our number: the freight charge is added to the booking
- Their number: the freight charge is noted on the booking but **NOT** added to the final quote since it will be paid by the client

Out 26/05/12 0800 In 26/05/12 1700 SHAW88900025 Region 0 - EAST Location 0 - Toronto

Customer Calendar Equipment Crew Venue Notes Payments Attac

Delivery via ups Service Regular Zone 0 Our number Their number Total Weight 20.00000 lbs

Return via ups Service Regular Zone 0 Our number Their number Total Volume 0.00000 Cubic feet

Calculated Delivery Charge (Freight Setup) 54.00

Calculated Collection Charge (Freight Setup) 54.00

Insurance Value 0.00

Apply to booking

When freight is entered or modified click 'Apply to booking' so that the latest freight is visible on the Equipment tab.

From the Equipment tab you can also click the blue refresh arrow to reload freight from the freight tab

Modify booking

Out 26/05/12 0800 In 26/05/12 1700 SHAW88900025 Region 0 - EAST Location 0 - Toronto Save Cancel

Customer Calendar Equipment Crew Venue Notes Payments Attachments Other Details Status Follow up

Code	Description	Quantity	Avail	Short	*Cross rental	Prep Qty	Quick T/A	Unit Rate	Days	%disc	Price	Stat	C	W
MONR	Monitor rack	1	1	0	0	0		175.00	1.00	0.00	175.00	Sng	✓	✓
BENQ	Benq widescreen	2	In Rack		0	0		175.00	1.00	0.00	350.00	prt	✓	✓
WCTL	Wireless Camera Tally Light	1	2	0	0	0		123.89	1.00	0.00	123.89	Sng	✓	✓
WCT	Wireless Camera Transmitter	1	9	0	0	0		0.00	1.00	0.00	0.00	prt	✓	✓
CDO	Camera dolly	1	11	0	0	0		0.00	1.00	0.00	0.00	prt	✓	✓

Total Hire 298.89

Del/pickup 108.00

Inst/Operator 600.00

Hire discount @ rate 0.00 0.00000 %

Event Management @ Rate 0.00 0.00 %

Damage waiver 0.00

Actual Cross rental 0.00

Sub total 1,006.89

Exempt 0.00

GST 74.57

Total Price 1,081.46 CAD


87.59

Multi Location Freight

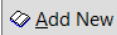
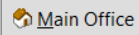
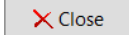
When using the multi-location module, an additional **Location** column will appear in the Freight Setup window allowing the freight option to be assigned either to all locations or to a specific location.

To configure Freight defaults for each location, navigate to **Setup → Locations**. On the far-right side of the Locations grid, you'll find the default settings for both **Delivery** and **Return** Freight options.

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

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			



 Locations cannot be deleted once they are added. Double click to edit a Location.
 

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.



Regions Setup

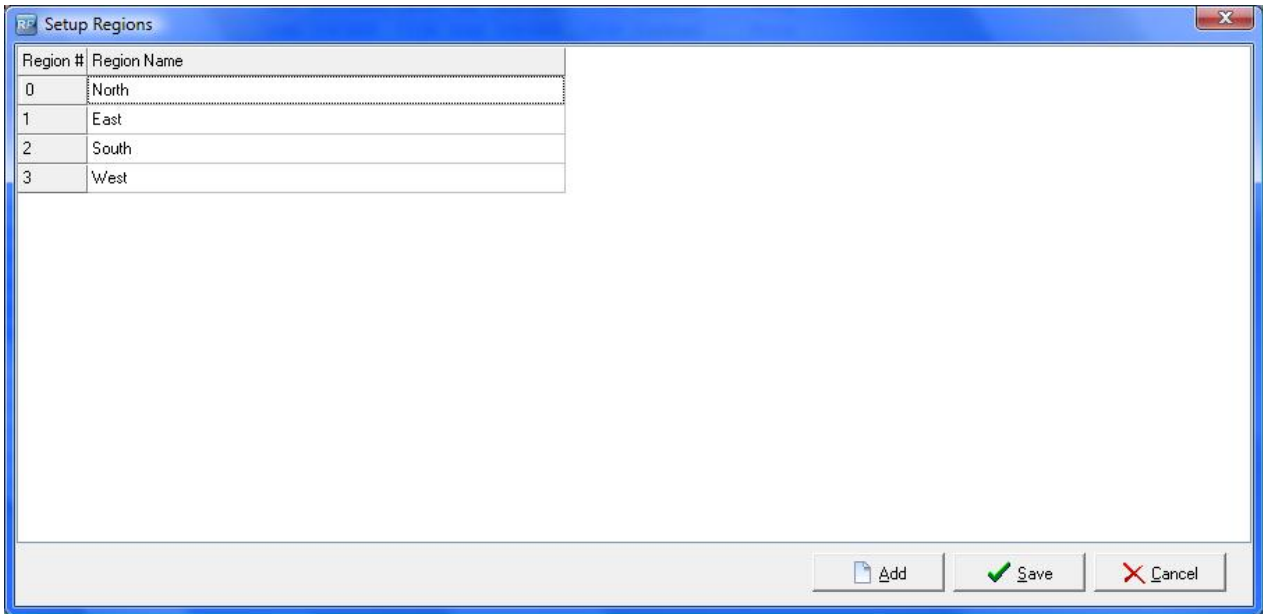
Used in conjunction with Locations, regions are used to group specific locations together. A company with 4 locations, 2 in Eastern Timezone and 2 Pacific Timezone, might create an Eastern and Pacific region, then slot the relevant locations under each region.

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.