

Entering a Booking & Booking Tabs

Last Modified on 07/11/2023 12:50 pm EST

RentalPoint core booking functionality, allows bookings to be created based on inventory previously entered in the system.

The booking tab names and order can be customized via Operational Parameter 109

From the Booking Grid click  or F3

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The Customer Tab

The screenshot shows the 'Customer Details' form in the RentalPoint software. At the top, there's a header with 'RP' and 'Inquiry'. Below that, a navigation bar includes tabs for Customer, Calendar, Venue, Equipment, Crew, Notes, Payments, Attachments, Other Details, Status, and Follow up. The main form area is divided into several sections:

- Invoice To:** Includes a 'New Customer' checkbox, 'Customer Code' (MYTEST), 'Company', 'Web', and 'Email' fields. There are 'Find' and 'Search' buttons.
- Bill To:** Includes a 'Same' checkbox and a search field.
- Address:** Divided into 'Street Address' and 'Mailing address' sections. Fields include Street, Address Line 2, City, State, Country, and Zip code. There are 'To Postal' and 'To Contacts' buttons.
- Pricing:** Includes 'Booking Type' (Rental), 'Rental Price Set Customer Pays' (Street), 'Sales Price Customer Pays' (Retail price), and 'Rental discount rate %' (0).
- Rental Income Type:** Radio buttons for 'Normal' (selected) and 'Production'.
- Contacts:** A table with columns for First Name, Last Name, Position, Phone 1, Phone 2, Cell, Email, and Address.

Customer Details

Select the customer by typing the customer name. The system will auto fill the information relating to the customer. If you're entering a new customer the details can be added immediately by clicking 'New Customer' checkbox.

Booking types

- **Rental Booking** has primarily Rental Inventory on it however it can also have consumable items. RentalPoint will expect any rental items to be returned.
- **Sale Booking** is for selling consumable or rental items. These will remain in Out status and will not be expected to be returned in the software.
- **Cycle Billed** (also known as Long Term) is for books that will be out for an extended period of time (perhaps undetermined) and regular invoicing needs to take place. Intervals are for 7, 14, 28, Monthly, Quarterly.
- **Sub Rentals/Cross Rentals** will show up in the equipment grid. These bookings are "tied" to a main booking for the purposes of resolving shortages. These bookings will appear on the Delivery and Return Schedule at the appropriate dates.
- **Transfers** are only available with the multi location module. If this module is enabled transfers between locations is available for shortage resolution.

Bill To

The Booking can be entered for one customer but billed to another when invoicing. Click the 'Same' checkbox to stay with the same customer.

Contacts

Information for each contact associated with the customer record. Here you can select booking, customer and payment contacts for the booking. The relevant contact information will be used on client documentation.

Rental Price Set Customer Pays

Price sets are determined during implementation and available for selection within the booking. The price set is used to price equipment added to the booking.

Sales Price Customer Pays

Prices sets are determined during implementation and available for selection within the booking. The sales price determined here is used to price sales equipment added to the booking. Sales prices can be changed in the product record.

Rental Discount Rate

Is displayed on the customer tab of the booking but has already been set up in the customer record. You'll have an opportunity to apply a once off rental discount on the equipment tab of the booking. However, if you want a rental discount permanently associated with the booking, then set this up on the financials tab of the customer record.

Customer Contact

By setting the 'Can change Customer Contact in a Booking' operator privilege, the user can now change the customer contact from within the booking (v11.3.4.0 and higher). If the user changes the customer contact, the customer record will be updated and all bookings referenced to that customer will reflect to the new customer contact.

The Calendar Tab

The dates for the booking are applied in the Calendar Tab. The green arrow on each screen will advance to the next tab. The out date as well as the return date can be specified. RentalPoint allows for more event specific times. Days Used and Days Charged can be used independent of each other and are controlled by parameters.

The schedule enabled checkbox and dates are controlled by operational parameter 78

Operational Parameter 88 controls use of Prep and De-prep dates: These dates are used to take the gear out of availability before the booking warehouse out date and after the booking return date to allow time for prep and de-prep of the gear before it is available for another show.

Modify booking

Out 01/05/19 1200 In 22/05/19 1200 TEMP0105400 Location 0 - London office

Customer Calendar Equipment Crew Venue Notes Payments Attachments Project Details Status Followup

Warehouse Out Date and Time

01-05-19 01-05-2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Warehouse Out Time 1200

Warehouse In Date and Time

22-05-19 22-05-2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Warehouse In Time 1200

Schedule Dates and Times

Schedule Enabled

	Date	Time
<input type="checkbox"/> Prep	01-05-19	1200
<input checked="" type="checkbox"/> Delivery	10-05-19	0800
<input type="checkbox"/> Setup by	10-05-19	1200
<input type="checkbox"/> Rehearsal	10-05-19	1200
<input checked="" type="checkbox"/> Show starts	10-05-19	1200
<input type="checkbox"/> Show finishes	18-05-19	1200
<input type="checkbox"/> Get-Out	18-05-19	1200
<input checked="" type="checkbox"/> Pickup for return	18-05-19	1800
<input type="checkbox"/> De-prep	22-05-19	1200

Days Using 21

Apply

Equipment Tab



Crew Tab

Before you can enter crew in the booking, the crew needs to be set up in your Inventory.

See more information at this link [Set up Labour Products and Technicians](#)

[Open Document in New Tab](#)

Venue Tab

The venue tab displays where the booking will be shipped to. New Venues can be added thru a booking.

The Status Tab

The status tab dictates how the system treats the booking with regards to inventory control.

This is considered the **Booking Progress Status**

- **Quote**
 - Does NOT reserve equipment and no warnings are given if another booking reserves the equipment originally booked.
- **Light Pencil**
 - Does NOT reserve equipment but warnings are displayed if someone is reserving the same equipment on another booking.
- **Heavy Pencil**
 - Will reserve equipment but it must be confirmed by the confirm date.
- **Confirmed**
 - Will reserve equipment and it will be ready for shipping.
- **Cancelled**
 - Will un-reserve and return any equipment that has been checked out.

When the booking is saved it will automatically be given a booking status

Booking Status

- **Booked Status** is the default status for any job that has not been checked out, returned, or cancelled.
- **Pull Status** is an mid range status between Booked and being checked out on the system. This has no effect on the equipment and is for informational purposes only.
- **Out Status** means a Final Check Out of the booking has taken place.

- **Returned** signifies a Final Return of all the gear has been completed.

The Notes Tab (now includes Statement of Work)

New to v12, the notes tab now accepts 'Statement of Work' separate to 'Booking Notes'

The screenshot shows a software window titled 'Modify booking'. At the top, there are fields for 'Out 19/01/30 0800', 'In 19/01/30 1700', 'MYTEST00099', and 'Location' set to '0 - Toronto'. There are 'Save' and 'Cancel' buttons. Below this is a tabbed interface with 'Notes' and 'Statement of Work' tabs. The 'Notes' tab contains a text area with the text: 'Booking notes can be used to keep track of revisions made to the booking by administrators/sales staff etc. Not necessarily printed on warehouse documentation.' The 'Statement of Work' tab contains a text area with the text: 'Statement of work typically describes show details and specific instructions to warehouse staff'. At the bottom center, there is an 'Add Time' button. In the bottom right corner, there is a small green circular icon.

Booking Notes:

- Booking notes can be used to keep track of revisions made to the booking by administrators/sales staff etc. not necessarily printed on warehouse documentation. The insert field used to include notes on RTF documentation is &BKNOTESC&

Statement of Work

- On the Notes tab of the booking in addition to booking notes a Statement of Work box allows the 'Scope of Deliverables' or the description of the event to be entered. This can then be added to the necessary reports using insert field &SOFWORKC&
- Statement of work can be added to fast reports that use the **Frp_Report_PickList** stored procedure, or the query below can be added to a custom stored procedure.
- ```
SELECT @StatNote = COALESCE(@StatNote, '') + '' + CAST(COALESCE(text_line, '') AS varchar(max)) FROM tblBookNote WHERE BookingNo = @booking_no AND NoteType = 3 ORDER BY line_no
```

# The Follow up Tab

*The feature allows the user to quickly access contact management. Follow-up tasks and activities can be planned and automatically linked to the booking.*

The top portion of the Followup form displays all the contact management activities that is associated with the booking.

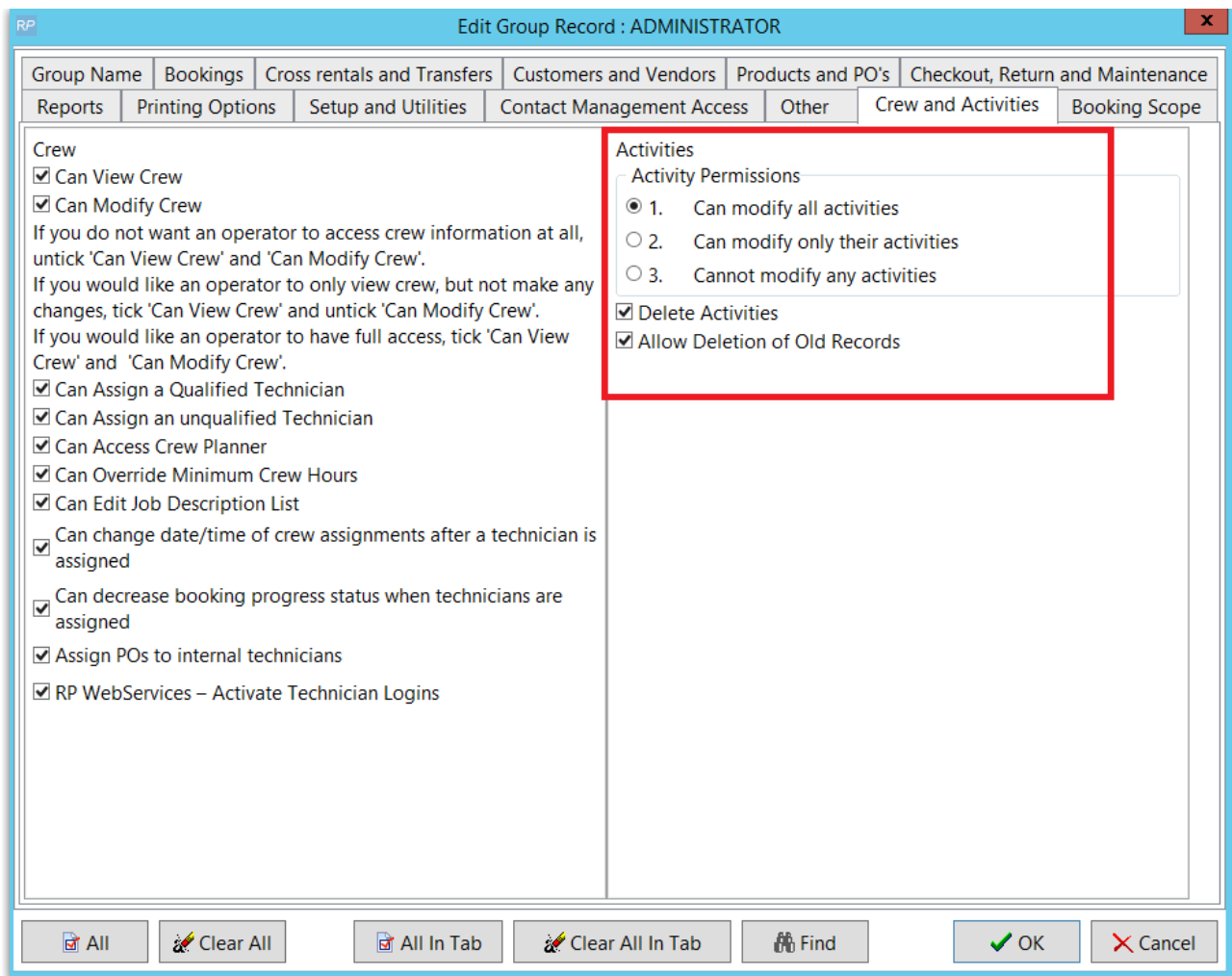
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## Operator Privileges Affecting Activities

To access operator settings, goto setup-->operators off the main menu

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## Parameters Affecting Activities

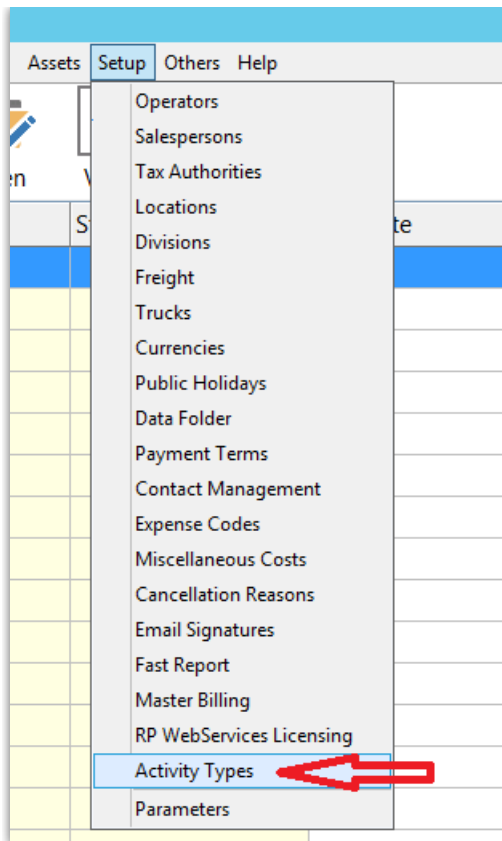
To access parameters Goto Setup-->parameters from the main menu

1. Operational Parameter 56 'Default Activity Type'
2. Operational Parameter 142 'Activity Options when Cancelling a Booking'

## Set Up New Activities

Access from the main setup menu





Click the RPWS box if you want crew to have access to that activity in RentaPoint Web Services

| ID | Activity          | Points | Colour | RPWS                                |
|----|-------------------|--------|--------|-------------------------------------|
| 1  | First Call        | 0      | Black  | <input checked="" type="checkbox"/> |
| 2  | Call Back         | 0      | Black  | <input checked="" type="checkbox"/> |
| 3  | Email             | 0      | Black  | <input type="checkbox"/>            |
| 4  | Meeting           | 0      | Black  | <input checked="" type="checkbox"/> |
| 5  | Other             | 0      | Black  | <input checked="" type="checkbox"/> |
| 6  | Call List         | 0      | Black  | <input type="checkbox"/>            |
| 7  | Distribution List | 0      | Black  | <input type="checkbox"/>            |
| 8  | Call Received     | 0      | Black  | <input checked="" type="checkbox"/> |
| 9  | Fax Broadcast     | 0      | Black  | <input type="checkbox"/>            |
| 11 | Busy in Warehouse | 0      | Red    | <input checked="" type="checkbox"/> |

## Create New Activity from within Booking


There are four ways to create a new activity from within the booking, see Fig 1, 2 & 3 below for illustration:

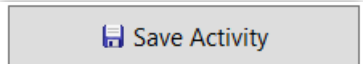
### Option 1:

Double click on the next blank line. See Fig 1.0 Below

Complete the Schedule Activity dialog box then save. See Fig. 2.0, 3.0 and 4.0.

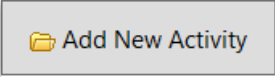
### Option 2:

1. Complete the Quick Add Activity section that is located left of the  button. See Fig. 1.0 below

2. Click on the  button.

### Option 3:

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1. Click on the  button. See Fig. 1.0 below
2. Complete the Schedule Activity dialog box then save. See Fig 3.0 below

**Fig. 1.0 – Followup Tab in the Booking Section**

RP Modify booking

Out 07/28/17 0800 In 07/31/17 1700 MYTEST00036 Location 0 - Toronto

Customer Calendar Equipment Labor Venue Notes Payments Attachments Other Details Status Followup

| Contact Name | Contact Phone | Description | Start Date | Notes | Alarm Date | Contact Type |
|--------------|---------------|-------------|------------|-------|------------|--------------|
|              |               |             |            |       |            |              |

Option 1: Double Click anywhere on the blue line

Option 2: Complete the Quick Add Activity

Option 3: Click Add New Activity Button

Quick Add Activity

Activity Type: Call Back

Description:

Contact:

Operator: RP

Start Date:

Notes:

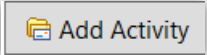
Enable Alarm

Save Activity

Add New Activity

Refresh Grid

## Option 4:

1. Click on the  button on the Customer Tab, then complete the details for the activity and save

**Fig 2.0 Booking Customer Tab**

Out 08/16/21 1505 In 08/17/21 1800 FHINK00005 Region 0 - EAST Location 0 - Main

Customer | Calendar | Equipment | Crew | Venue | Notes | Payments | Attachments

Customer  
 Customer Code: FHINK Find Search Bill To:  Same FHINK  
 Organisation: Francis Hinkley  
 Web: Email:

Booking Type: Rental  
 Currency: \$ - CAD  
 Rental Price Set Customer: Standard  
 Sales Price Customer Pay: Retail price  
 Rental discount rate %:  
 Rental Income Type:  Job  Equipment

Street Address: Postal address  
 Street: 8877 Cabbot Trail To Postal To Contacts  
 City: Newmarket State: Ontario  
 Country: Canada Postal Code: H3L6T2

+ Locate/Add New Contact Open Contact

| First Name | Last Name | Position | Phone 1 | Phone 2 | Cell | Email | Address                            |
|------------|-----------|----------|---------|---------|------|-------|------------------------------------|
| Thomas     | O'Reilly  |          |         |         |      |       | 8877 Cabbot Trail Newmarket H3L6T2 |

Click here to select the contact

Booking Contact: Thomas O'Reilly Customer Contact

Booking  Customer  Payment

Contacts | Phones | Notes | Account details

**Fig 3.0 Activity Window**

RP Schedule Call

Activity Details Notes

Activity Call Back

Description

Company

Contact

Operator RP

Ask For

Start 07-29-17 1941

End 07-29-17 1941

Last Contacted 07-29-17 1941

Link Activity To

Booking

Project

Alarm

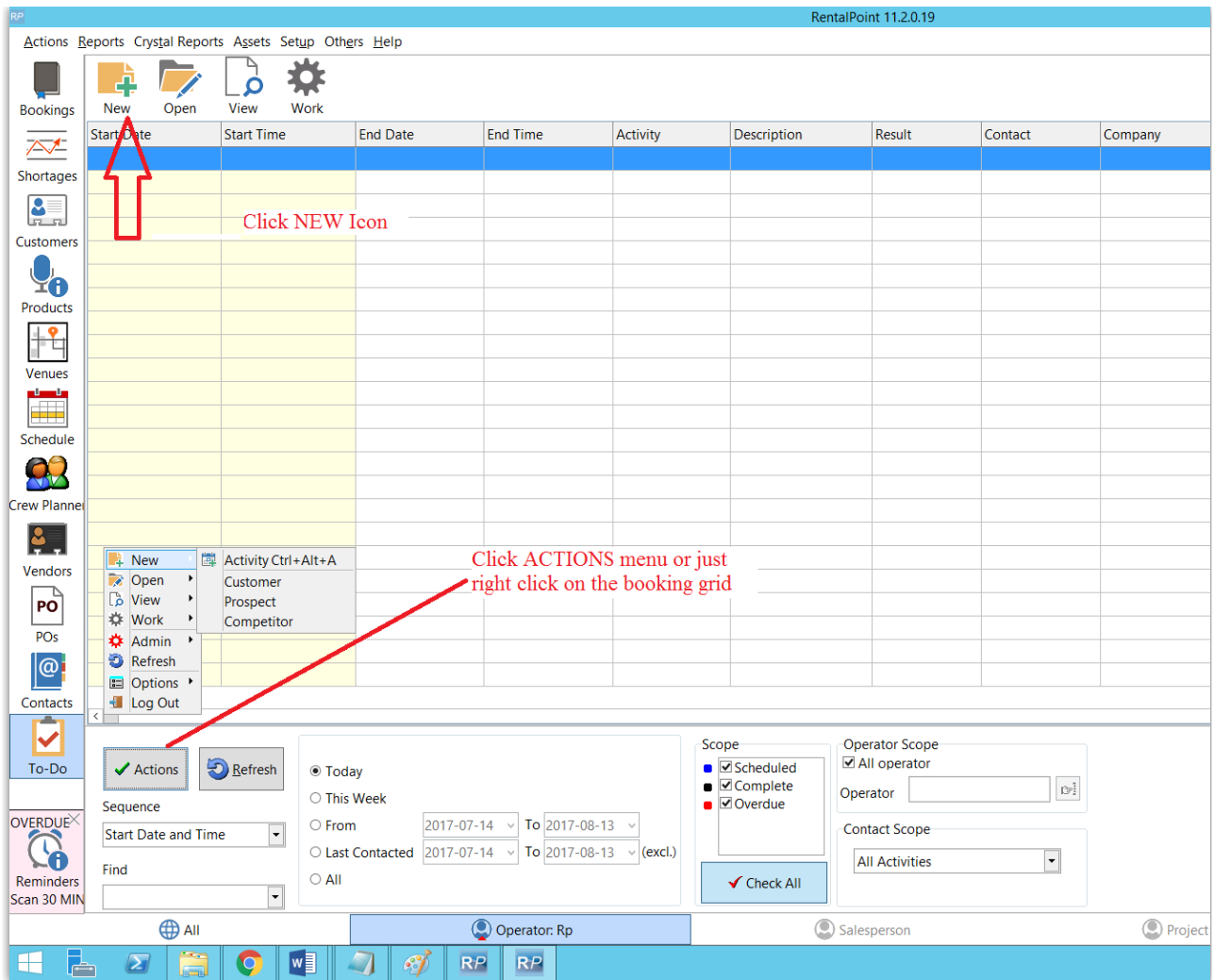
Message

Date 07-29-17

Time 1941

My Calendar Save Cancel

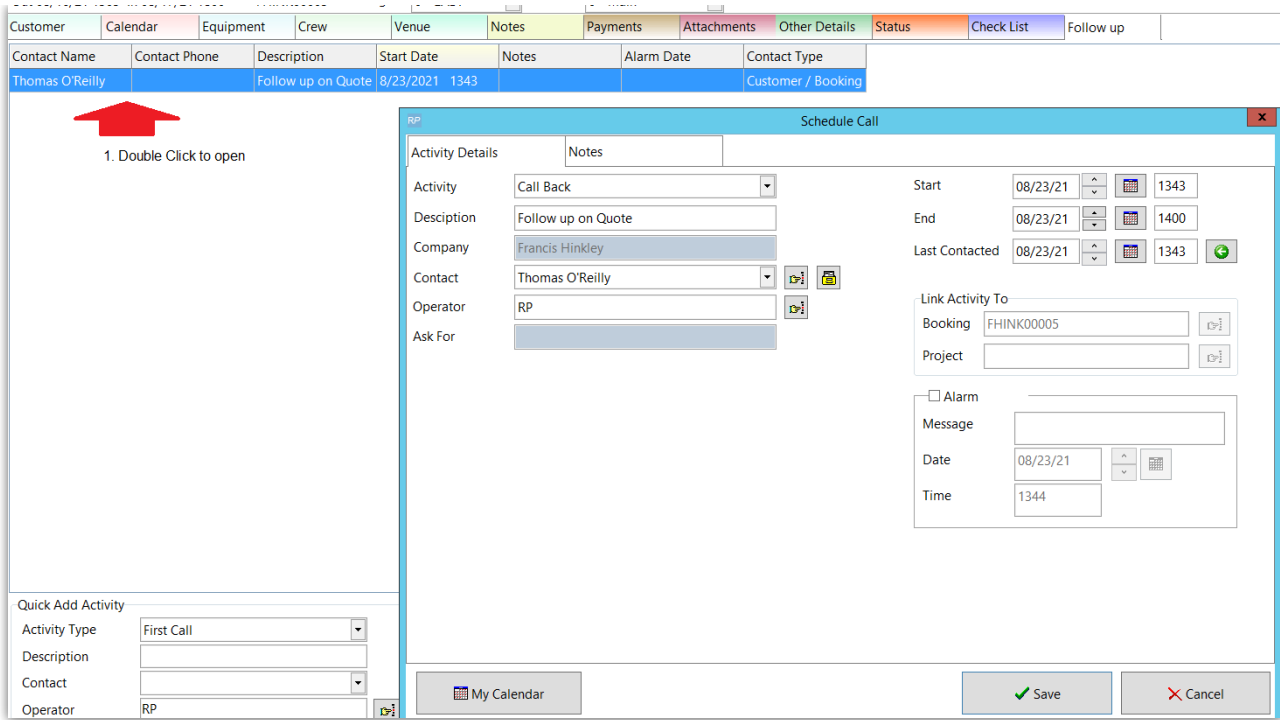
Create New Activity from 'To Do Menu'



## Modify a Scheduled Activity

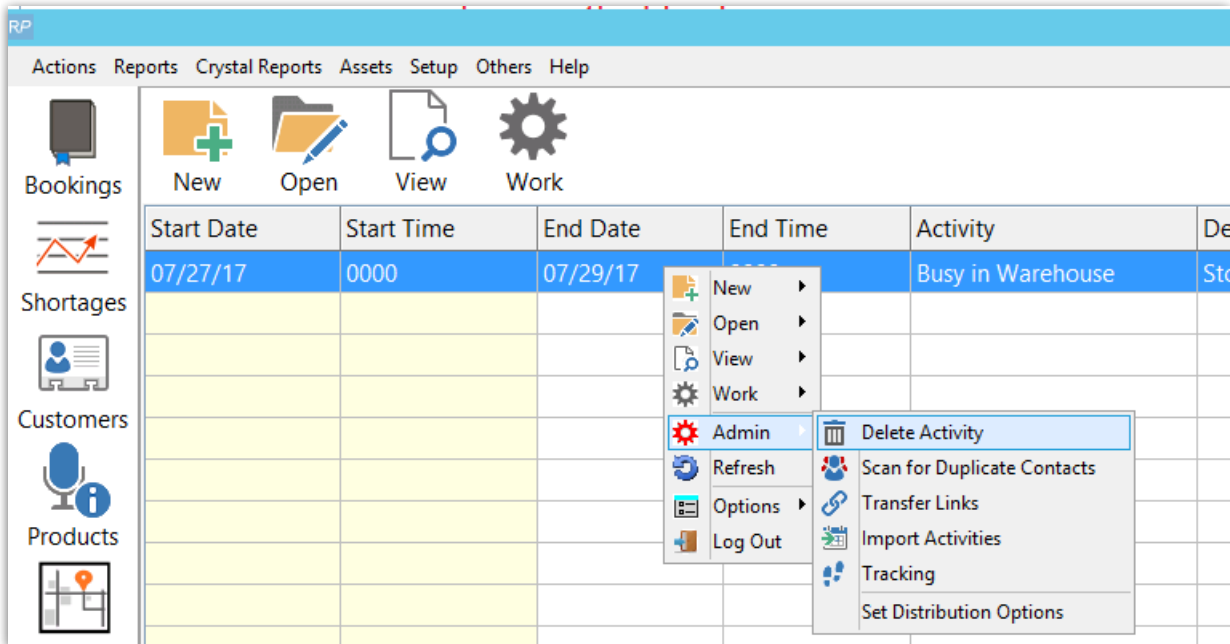
1. Select the line from the Activity Summary.
2. Double click on the line.
3. Update or change values in the Scheduled Activity dialog box.

4. Click on the  button.



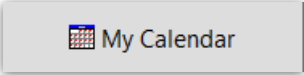
## Delete a Scheduled Activity

Right click on the activity line , then click Admin -->delete.



## Complete a Scheduled Activity

1. Select the activity from the Followup Summary list by double clicking on the line.

2. Click on the  button.

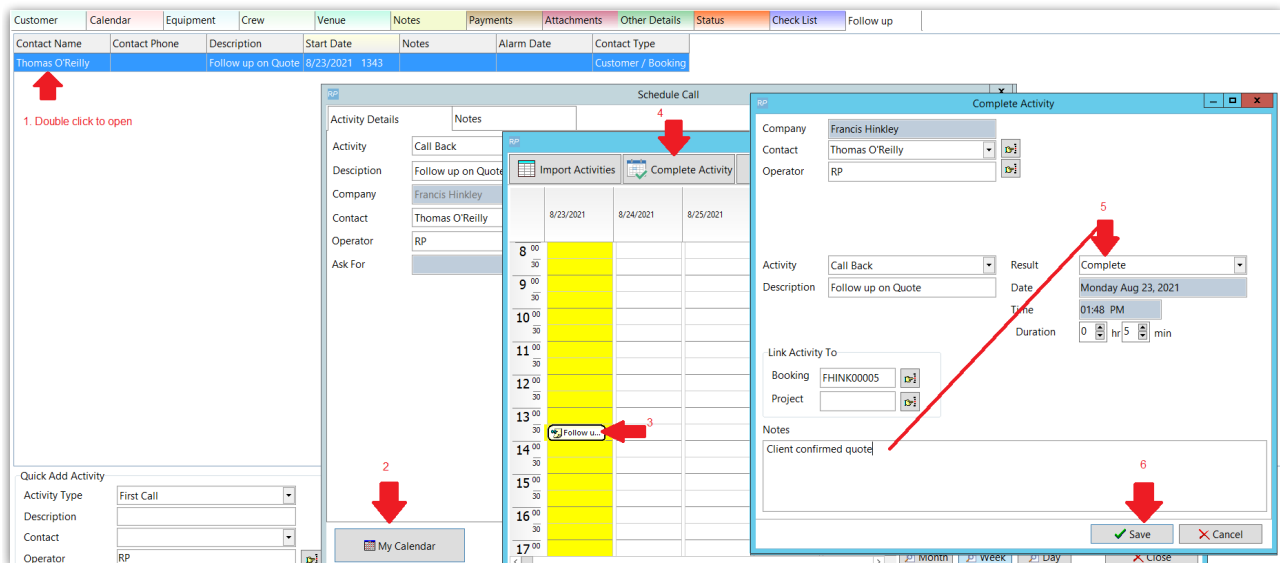
3. Find task/activity from the calendar. Click once on the item to highlight.

4. Click on the  button. A dialog box pops up. See Fig. 1 below

5. Complete the form. Before saving, the **Result** dropdown is a mandatory field and a value must be entered or selected. Note, the list is built from user entry so if you don't see the result option you want, just key one in and it will be available for future selection. See the Fig. 7.0 - **Result** highlighted in red.

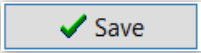
6. Click on the  button.

Fig 1



## Set up an Activity Reminder

The purpose of the activity reminder is to alert the operator about an activity for a specific date and time. The alert works only in the RentalPoint Software. It is not integrated with the another software or operating system.

1. Double click on the activity line from the Activity Summary.
2. Check the Alarm checkbox. This will enable the entire alarm section. See Fig. 8.0 below.
3. Enter **Message, Date** and **Time**.
4. Click on the  button.

When an alarm is triggered, a dialog box will pop up while the operator is using the RentalPoint Software. See example of Alarm Message below



RP Schedule Busy in Warehouse

Activity Details    Notes

Activity: Busy in Warehouse

Description: Stock Taking - Don't book me on any jobs

Company: AIRPUSH, INC.

Contact: Mandy Fox

Operator: CHECKOUT

Start: 07-27-17 0000

End: 07-29-17 0000

Last Contacted: -- -- -- 0000

Link Activity To:

Booking: [ ]

Project: [ ]

Alarm

Message: My Alarm

Date: 07-29-17

Time: 2005

My Calendar    Save    Cancel

### Sample Alarm

RP Alarm

You have a(n) Call Back  
Scheduled For: 09:00

test

5 minutes

Dismiss

Remind Me Again In

Open This Activity

Make a New Call

## Use Activities to Show Crew UnAvailability

Set up an activity like 'unavailable' or 'vacation'

RP Activity Types Setup

| ID | Activity          | Points | Colour | RPWS                                |
|----|-------------------|--------|--------|-------------------------------------|
| 1  | First Call        | 0      |        | <input checked="" type="checkbox"/> |
| 2  | Call Back         | 0      |        | <input checked="" type="checkbox"/> |
| 3  | Email             | 0      |        | <input type="checkbox"/>            |
| 4  | Meeting           | 0      |        | <input checked="" type="checkbox"/> |
| 5  | Other             | 0      |        | <input checked="" type="checkbox"/> |
| 6  | Call List         | 0      |        | <input type="checkbox"/>            |
| 7  | Distribution List | 0      |        | <input type="checkbox"/>            |
| 8  | Call Received     | 0      |        | <input checked="" type="checkbox"/> |
| 9  | Fax Broadcast     | 0      |        | <input type="checkbox"/>            |
| 11 | Busy in Warehouse | 0      |        | <input checked="" type="checkbox"/> |
| 12 | Vacation          | 0      |        | <input checked="" type="checkbox"/> |
|    | Unavailable       |        |        | <input checked="" type="checkbox"/> |

Save Close

Add an activity for the technician's contact record

RP Activity Types Setup

Schedule Unavailable

Activity Details

Activity: Unavailable

Start: 19-08-21 1453

End: 19-08-21 1453

Last Contacted: 19-08-21 1453

Contact Search

Search Criteria

Fields: Contact Name, Company Name, Address 1, Address 2, City, State, Country

Search Values: software support

Match Option:  Any Item (OR)  Exact All (AND)

Max Records: 150

Search Results

Records Found: 1

Contact Name: Software Suppl, Company Nam, Address, Phone 1, Contact Email: support@rentp, Drivers

Operator: Rp

Set the technicians schedule of unavailability

RP Schedule Unavailable

Activity Details    Notes    Recurring

Activity: Unavailable

Description: Tech is not available

Company: [Empty]

Contact: Software Support

Operator: RP

Start: 19-08-21 0000

End: 19-08-21 2359

Last Contacted: 19-08-21 1453

Link Activity To:

Booking: [Empty]

Project: [Empty]

Alarm

Message: [Empty]

Date: 19-08-21

Time: 1453

My Calendar    Save    Cancel

Click the 'Recurring' tab to set up a recurring schedule, when complete hit SAVE

RP Schedule Unavailable

Activity Details    Notes    Recurring

Select Start Date    Select End Date

August 2019    August 2019

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
|     |     |     |     | 1   | 2   | 3   |
| 4   | 5   | 6   | 7   | 8   | 9   | 10  |
| 11  | 12  | 13  | 14  | 15  | 16  | 17  |
| 18  | 19  | 20  | 21  | 22  | 23  | 24  |
| 25  | 26  | 27  | 28  | 29  | 30  | 31  |

Frequency:

None

Every 1 Days

Every 1 Weeks

Every 1 Months

Every 1 Years

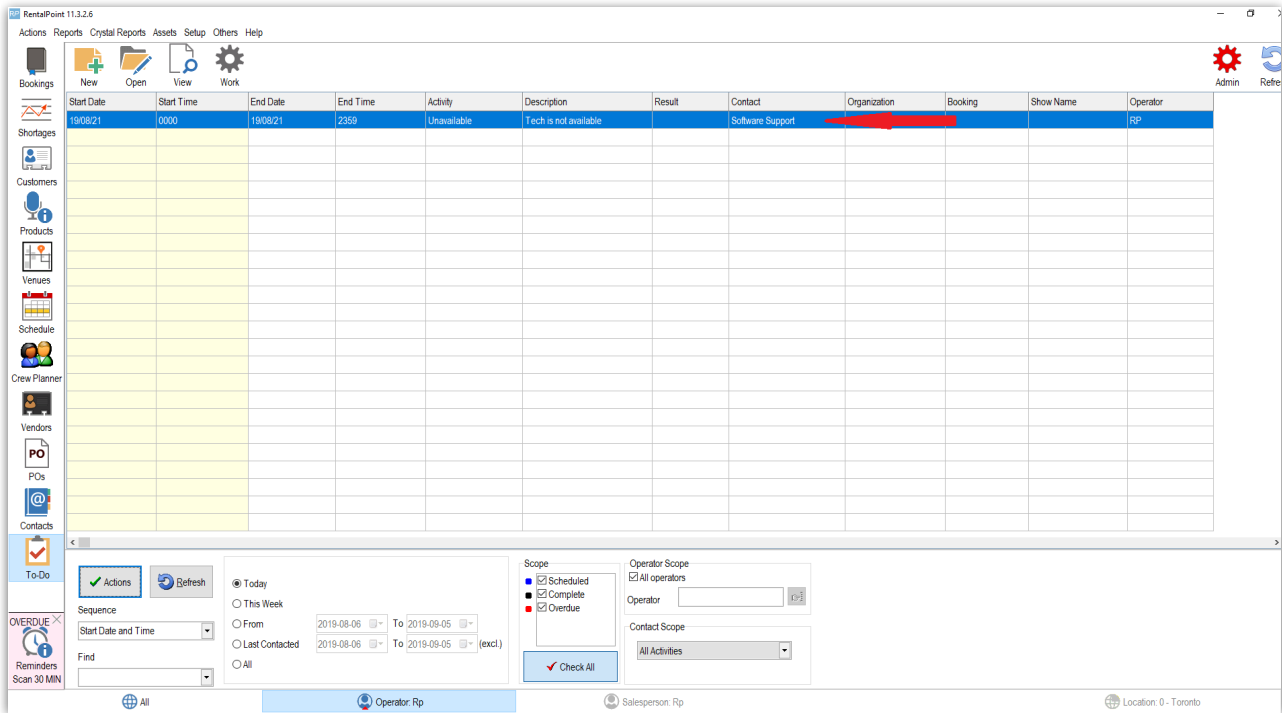
Skip Weekends

Scheduling Recurring Activities

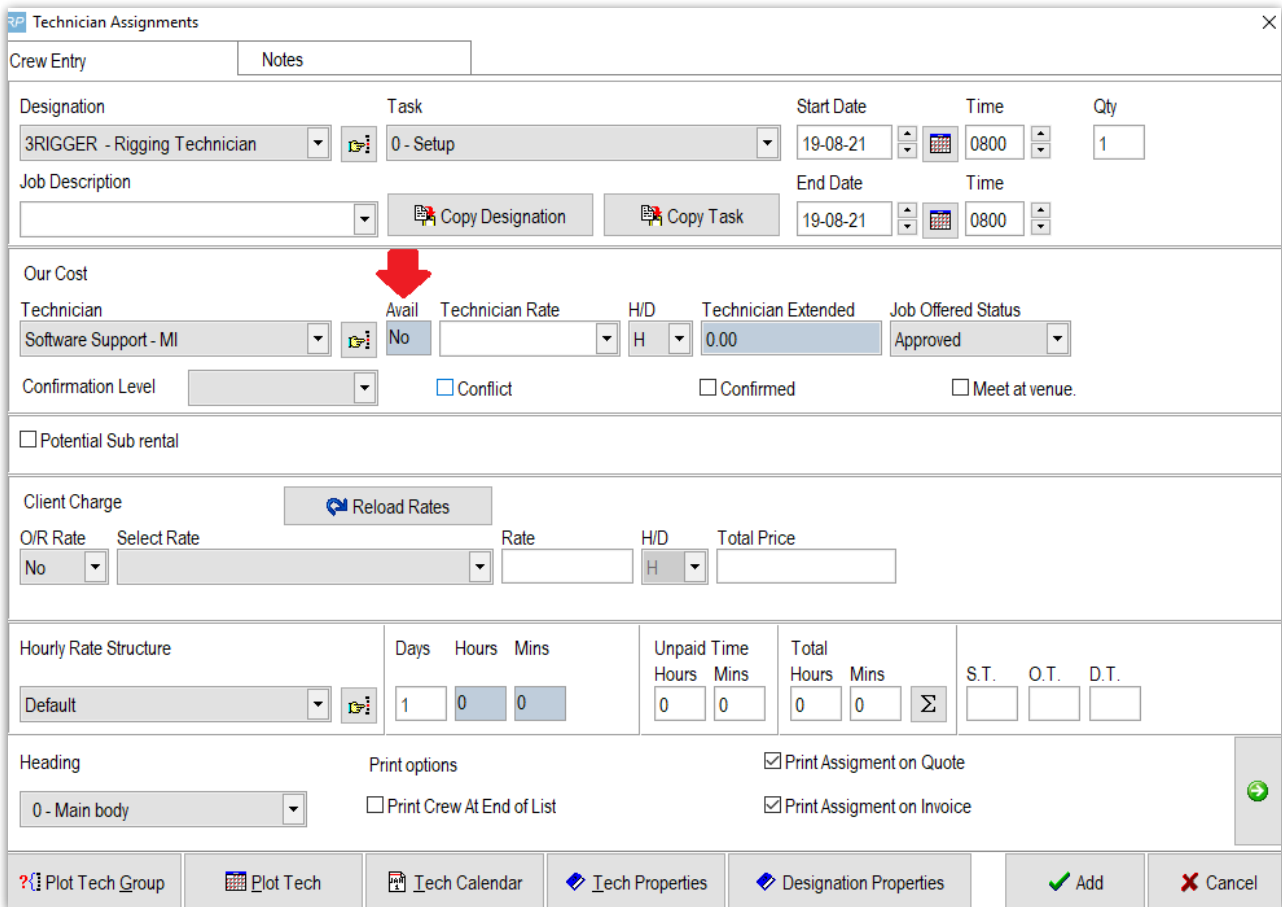
Selecting a frequency will cause the activity entered on the detail tab to be scheduled repeatedly according to the frequency selected, beginning with the start date and ending on the end date. Note: Once scheduled, recurring activities can only be modified by selecting each individual activity.

My Calendar    Save    Cancel

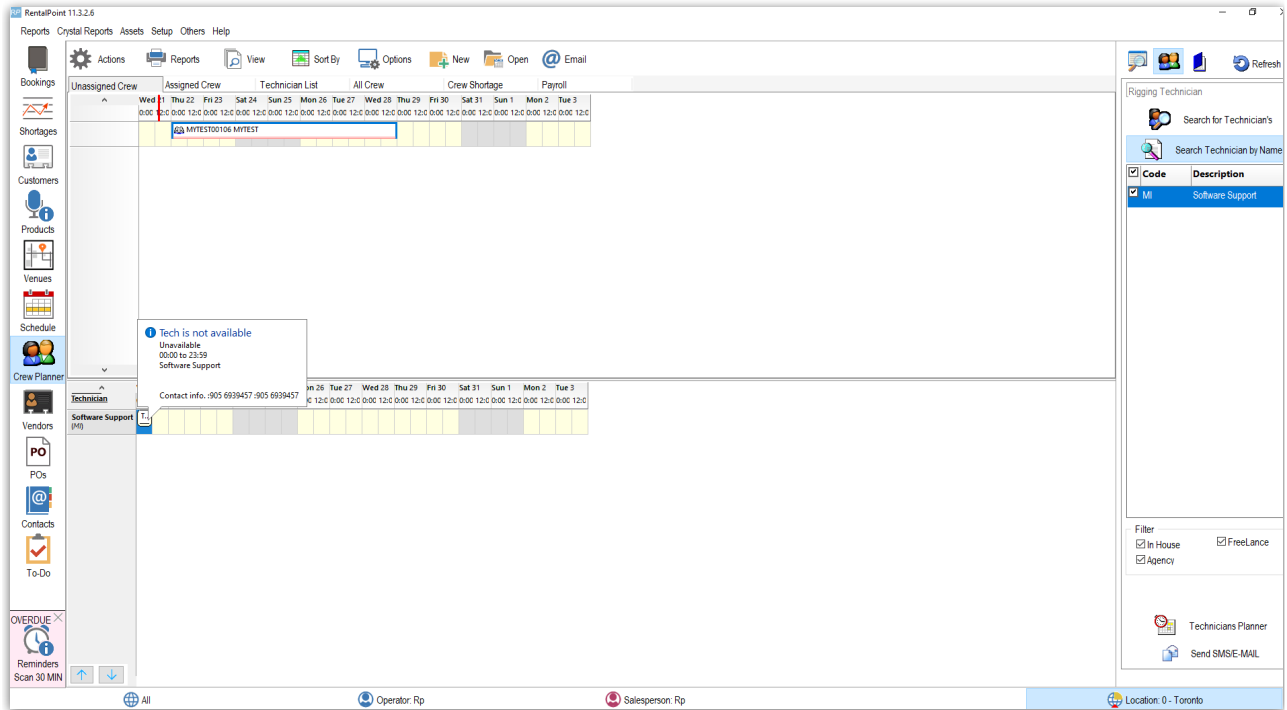
The activity will show up in the grid...



When adding the technician to the booking for the activity date, the tech will show as unavailable...



Tech also shows as unavailable in the Crew Planner....



## Activity List Report

[<more information>](#)