

The Inventory Setup Window

Last Modified on 28/02/2024 1:50 pm EST

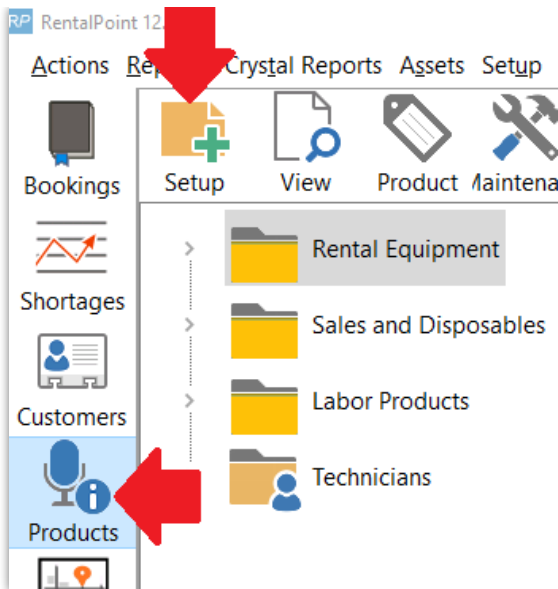
Table of Contents

- [Accessing Inventory Setup](#)
- [The Inventory Treeview](#)
 - [Group](#)
 - [Category](#)
 - [Sub Category](#)
 - [Product](#)
 - [Assets](#)
- [Importing Products](#)
- [Importing Assets](#)
- [General Functions in the F10 Window](#)
 - [Move](#)
 - [Find](#)
 - [Change Price Utility](#)
- [Inventory Utilities](#)
 - [Recalculate Rental Stock Quantity](#)
 - [Reset User Preferences](#)
- [Import Rental Rates](#)

Inventory Setup is a dedicated area of the system that allows you to set up and manage your company inventory. There is a difference between the Inventory Setup Menu (where you can set up and manipulate inventory) and [the Products Menu \(where you can view & report on products\)](#).

Accessing Inventory Setup

Press the F10 key to launch the **Inventory Setup** window or access from the 'Setup' option on the Products menu.



The Inventory Treeview

RentalPoint uses a treeview structure to organize products. There are four main folders (listed below), these folders cannot be renamed or moved, these are the root structures of the tree

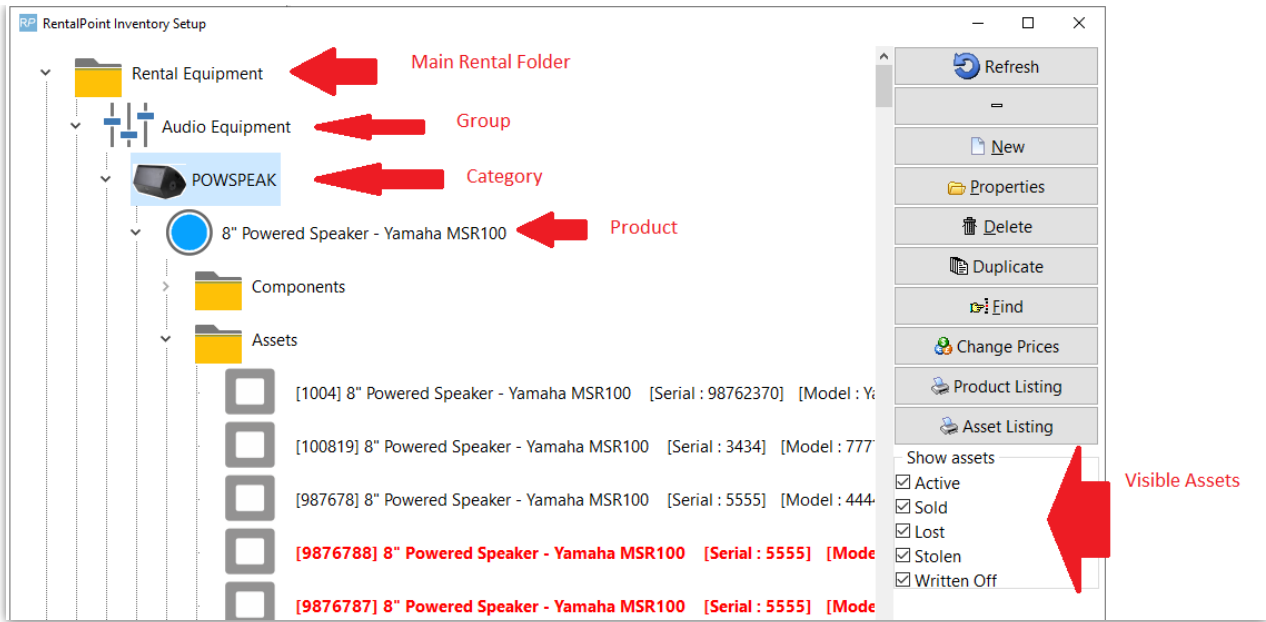
1. Rental Equipment,
2. Sales and Disposables,
3. Labour Products,
4. Technicians

Within these root structures you can create Groups, Categories, Subcategories, Products and Assets.



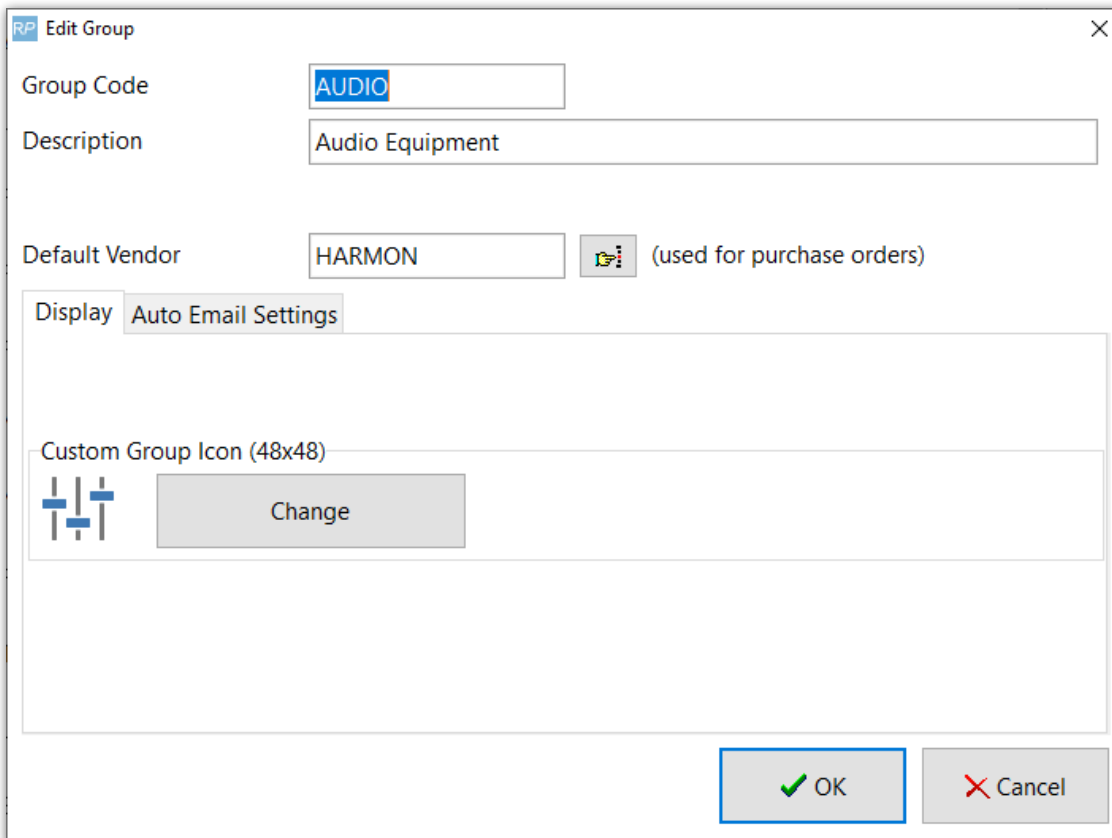
Ensure boxes are checked for all assets you want visible in the Inventory Tree

Customize icons for group, category, product within the setup of each record



Group

Groups are used to separate large areas of equipment. An example of a group may be Audio, Lighting or Staging.



Group Auto Email Settings

Available in later releases - auto email a list of contacts when a product is added or modified on a booking

1. Setup all applicable contacts via the Contacts Menu.
2. Edit the group and add the contact to the Auto Email Settings.
3. The check boxes will determine when the contact is emailed.
 1. Add will only email a contact when equipment is first added to the booking.
 2. Edit will email the contact each time the equipment changes on the booking.
 3. Del will email the contact only when ALL equipment for that group is deleted from the booking.

There is no parameter to control this functionality. Simply put; If the user is on the list, the system will auto email. If there's no one in the list, no emails will be sent.

Edit Group

Group Code:

Description:

Default Vendor: (used for purchase orders)

Display | **Auto Email Settings**

First Name	Last Name	Email	Save	Add	Edit	Del
Software	Support	support@rentp.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Category

A category helps to further split up the main group folder. So within the Audio group, you may want to use categories such as Power Speakers, Microphones or Sound Boards.

Standard Cost %

This is used in the [Profit Analysis Report](#) (also the 'Analyse' button in the booking) It adds a percentage of the rental price to the cost of the equipment. If the 'Standard Cost %' in the category record is blank this report will use the default percentage set up in Pricing Parameter 79.

Equipment Tab Display Colour

Used to designate the display colour when adding products from this category on the equipment grid of a booking

RP Equipment Category ×

Category Code

Description

Standard Cost %


Equipment Tab Display Color

Default Blue Maroon
 Olive Lime Aqua

This is how the selected color will appear in the grid.

Bold Font

Custom Category Icon (48x48)

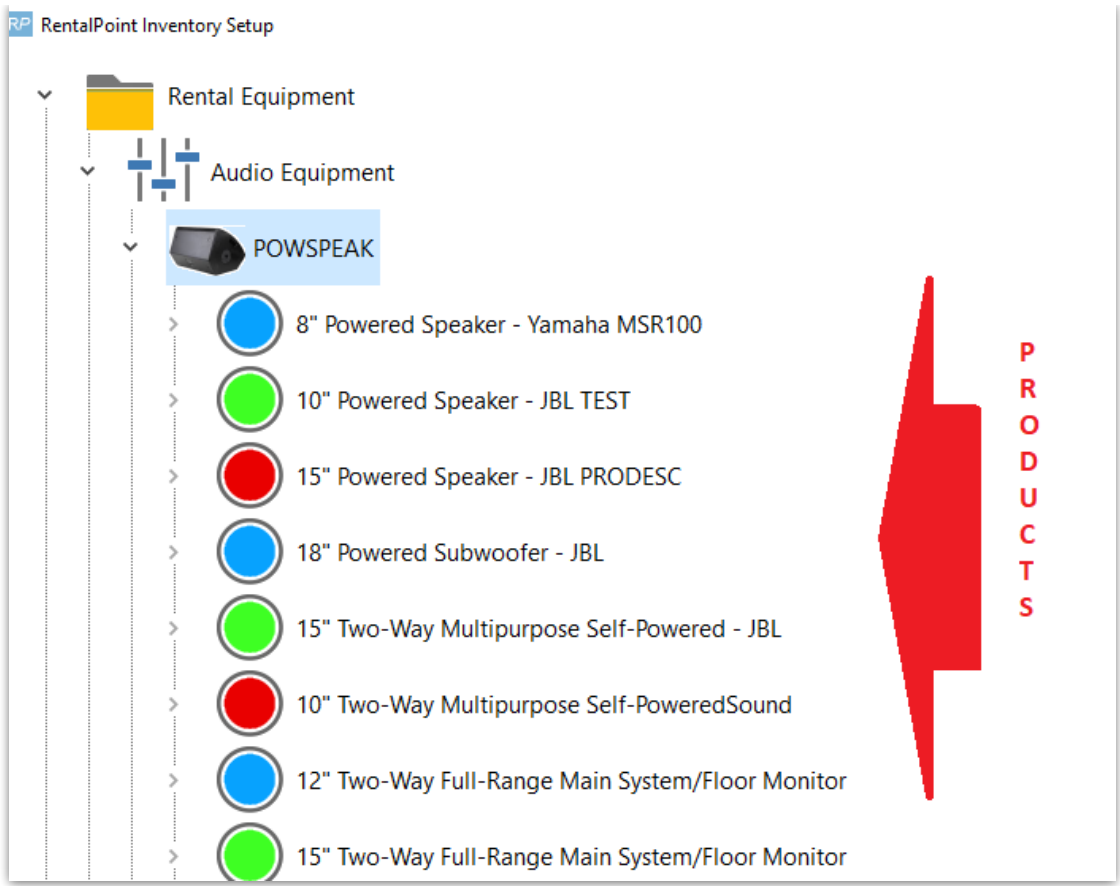


Sub Category

Subcategories can be enabled via Operational Parameter #194. This allows further organization of your categories. So within the Microphone category you may want subcategories of Wired Mics, Wireless Mics or Lapel Mics.

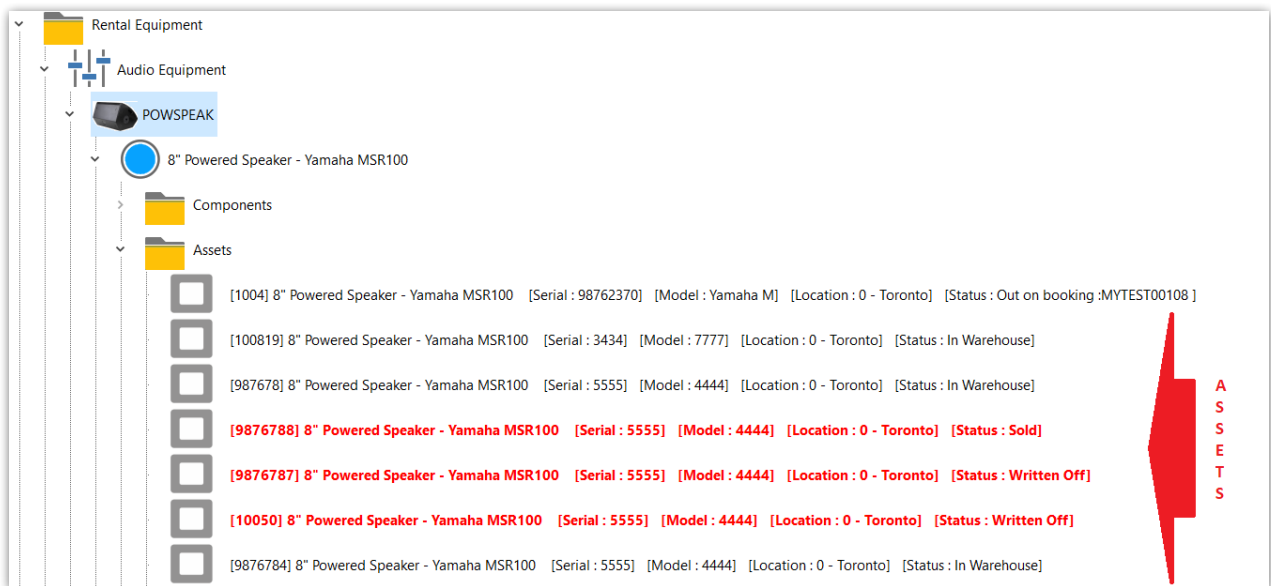
Product

A product is the information related rental/sales items used on bookings.



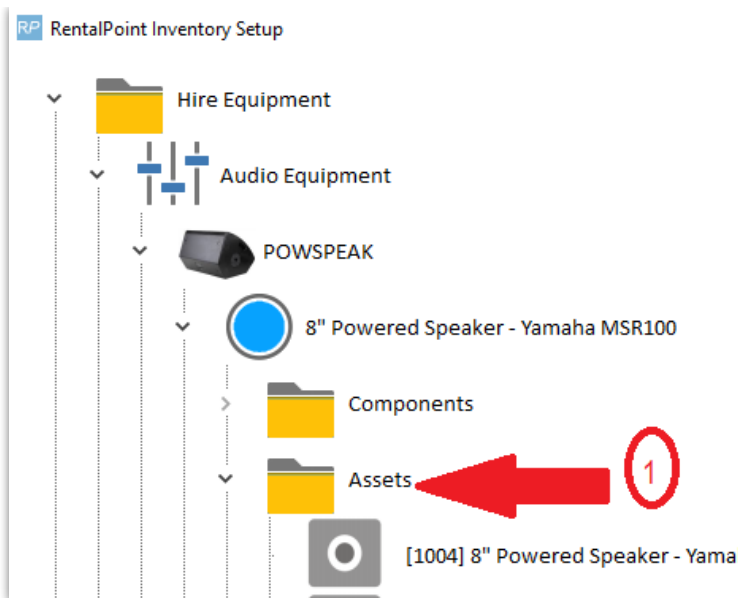
Assets

Assets are the individual items that are sent to a client. You may have five microphones in your warehouse and each has a barcode. You would enter these microphones individually into the Asset folder.



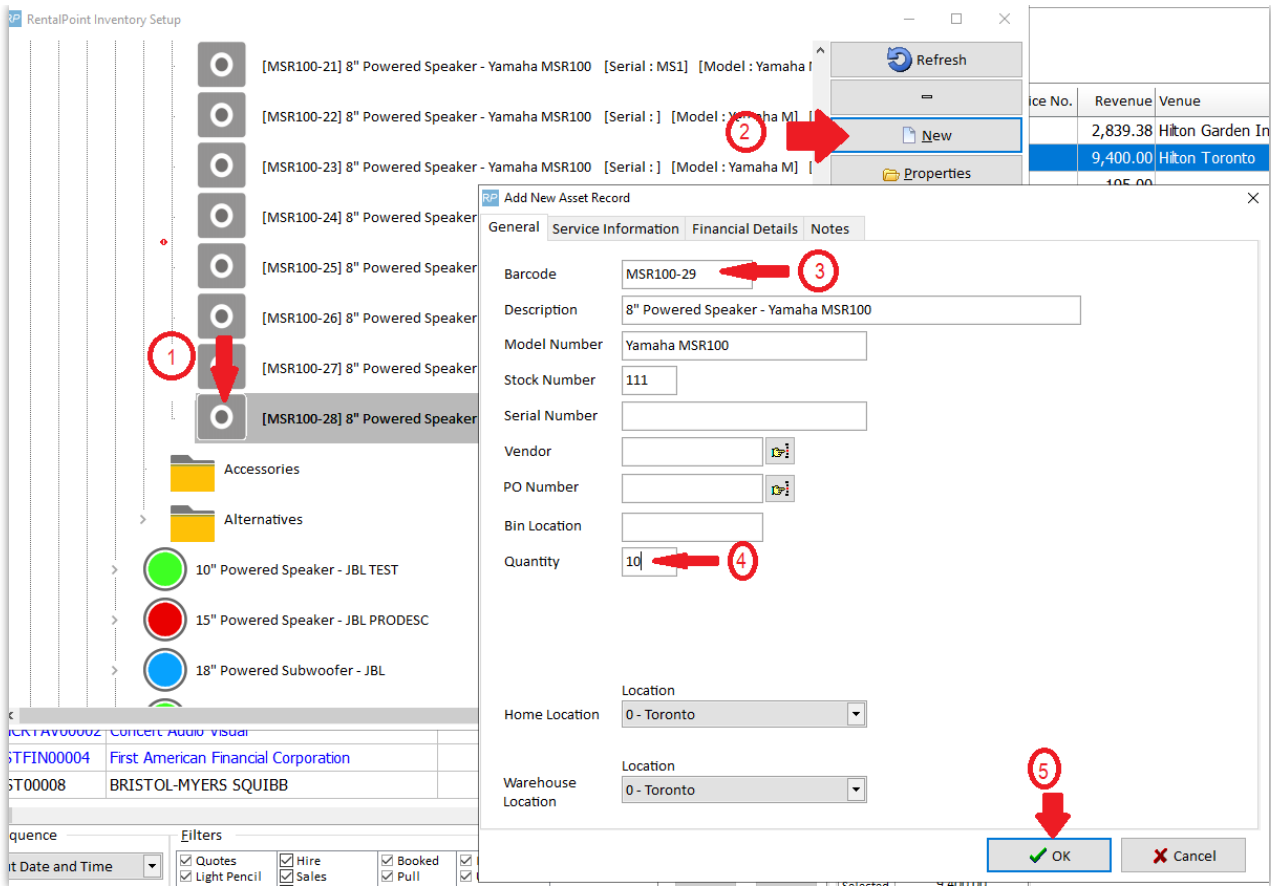
To add new assets:

Click on the Asset folder under any product

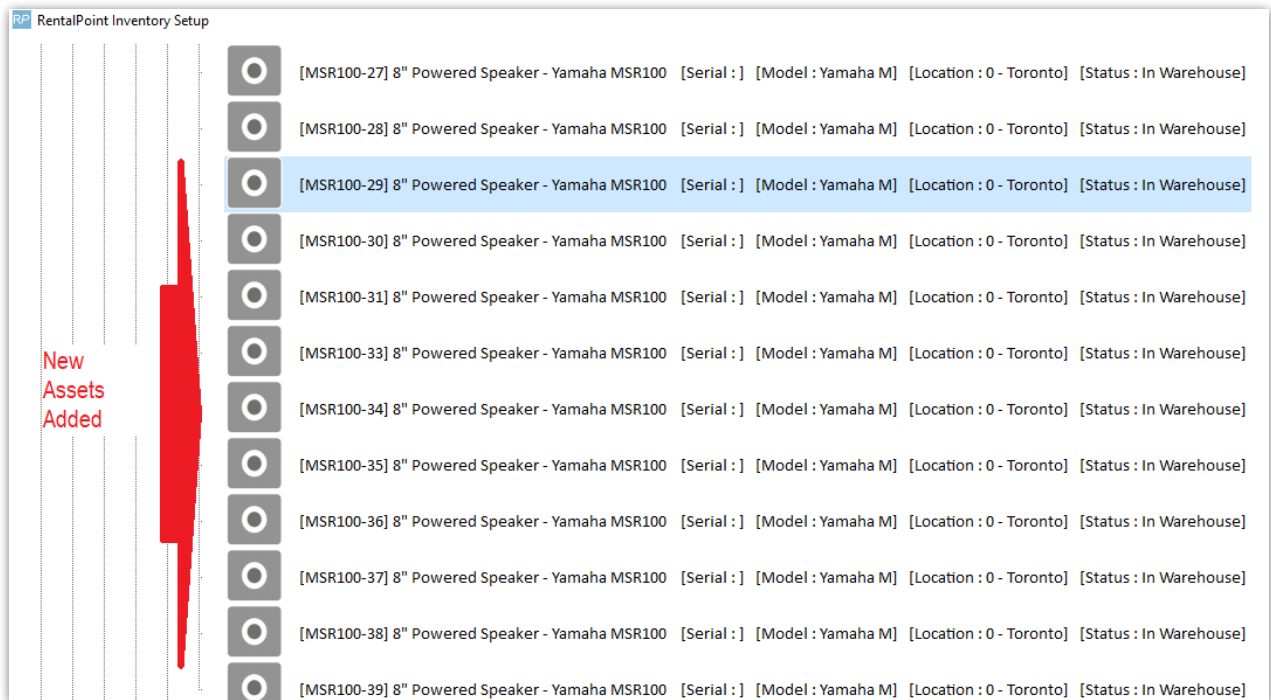


Or any existing asset in that folder, then click new

1. Click asset folder or any existing asset for the product
2. Click new
3. If assets already exist for the product, then next barcode in sequence is already set for you, however you can change the barcode if you prefer. If entering the first asset for this product, enter the barcode of your choice.
4. Enter the number of assets to add (if more than one, RentalPoint will increment the barcode for every asset in sequence).
5. Click OK, then confirm asset addition to proceed.



Asset will be added to the inventory tree per screenshot sample below



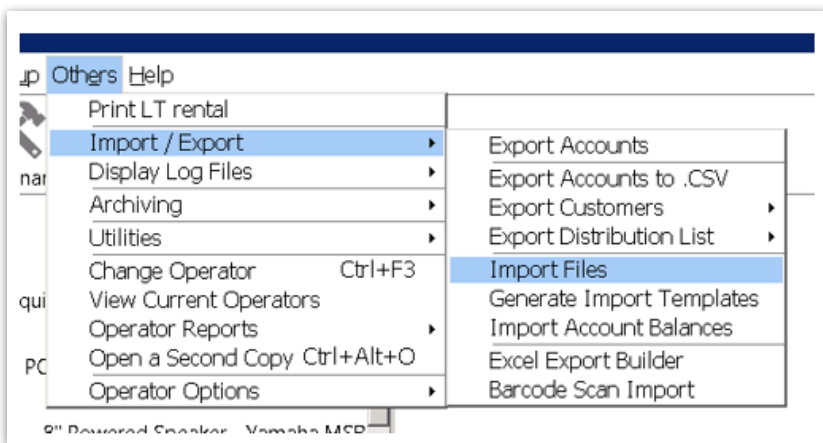
Importing Products

This is normally accomplished with the aid of an Implementation Specialist during your Rentalpoint

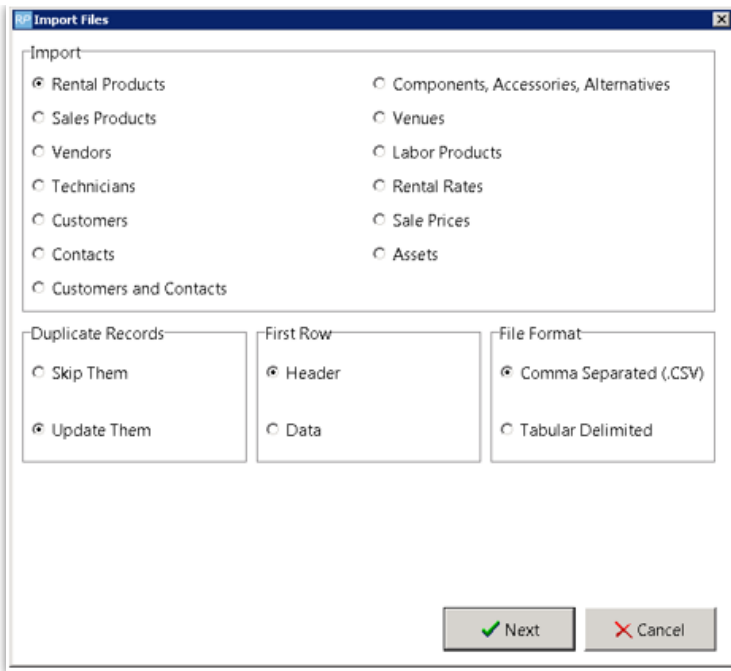
Implementation Phase. A brief description is provided below. Extreme caution should be taken if importing products to an existing live environment so as not to mistakenly overwrite existing data. **Please take a backup of your database before importing new products.**

- Import inventory to RentalPoint via comma separated or tab delimited files. Both of these file formats can be opened and edited in Excel. Product information can be updated via the import procedure.
- Please note, CSV stands for 'Comma Separated Values'. This means that each field in the file is separated from the next field by a comma. Commas must be removed from within your data prior to importing. Alternatively the file can be saved in tabular delimited format. Quotation marks are not permitted in product codes.
- Users can contact RentalPoint support to obtain a template of the data that RentalPoint expects for input. Once a template is filled with the corresponding information it can then be imported into the system.

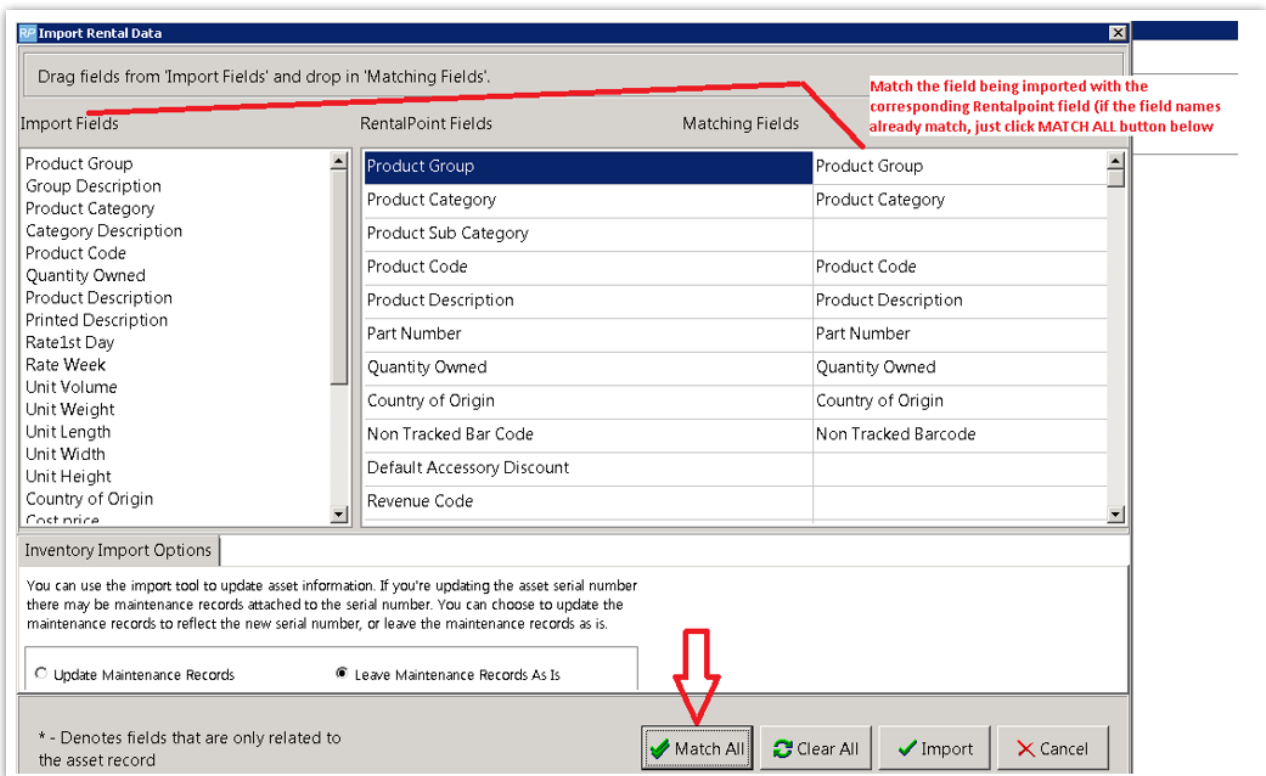
To import, click the 'Others' menu option, click Import/Export and click Import Files.



Select the type of import that you wish to complete. Once selected, search for the file that you wish to import.

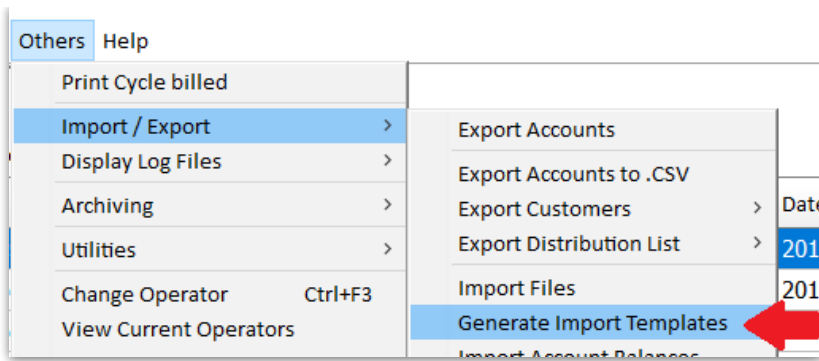


You will be prompted with a screen to match/pair the columns from the spreadsheet to the fields that RentalPoint expects to be filled. Remember to also choose how you would like maintenance records to be treated. Once this is complete click Import and the system will begin to import the products.

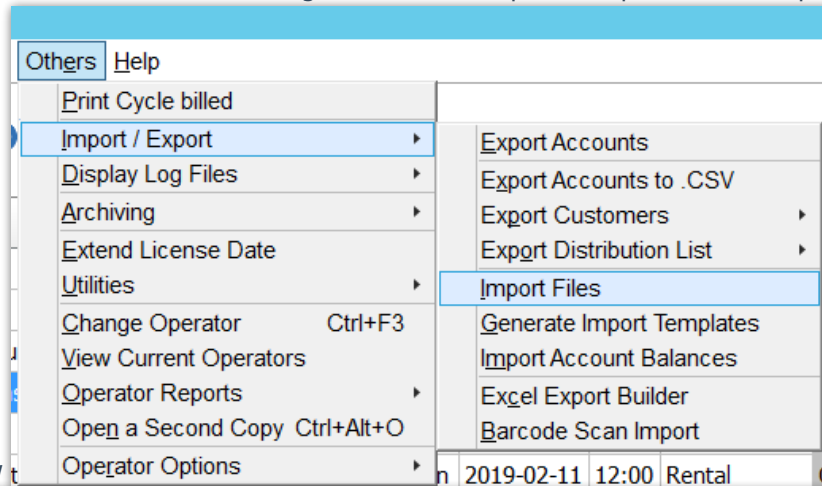


Importing Assets

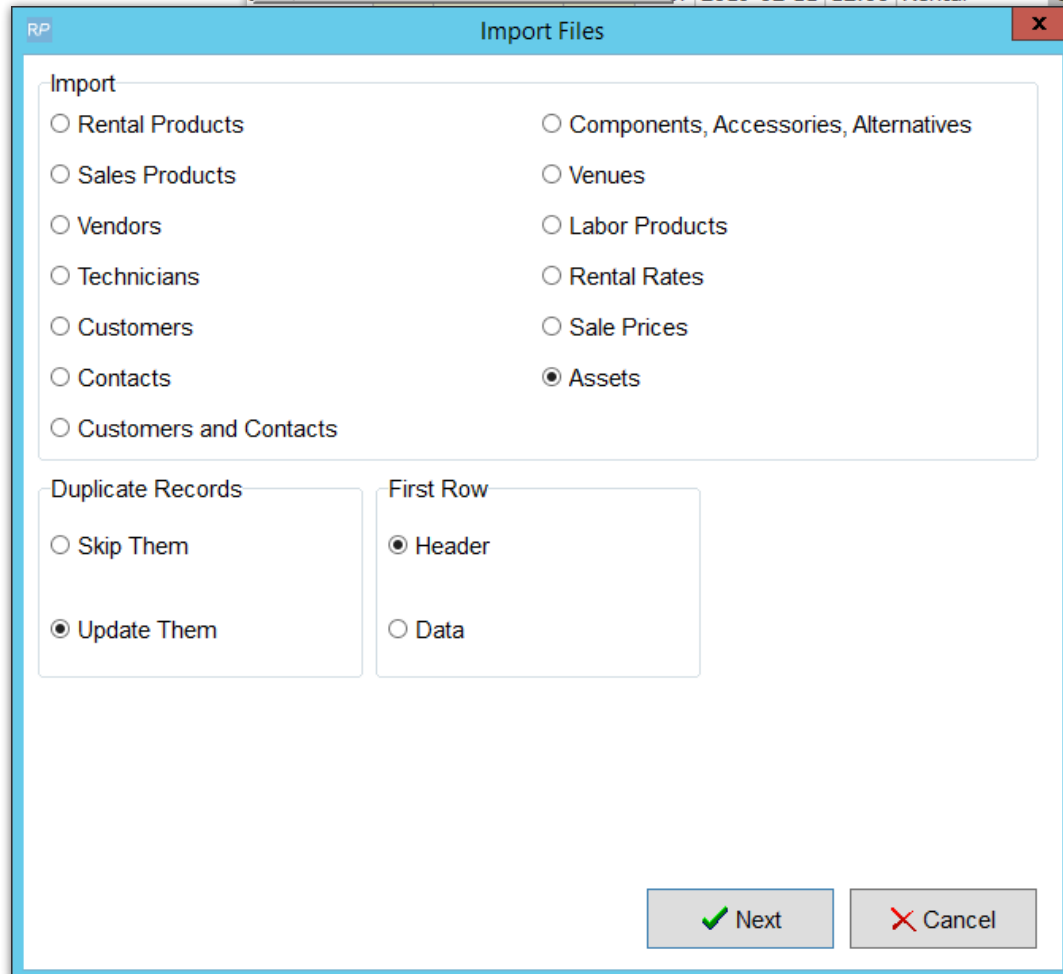
Asset import template can be access via others-->import/export-->generate import templates

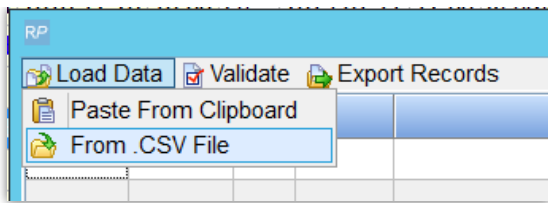


Add up to 100 assets to an excel file (using RentalPoint import template), and import per

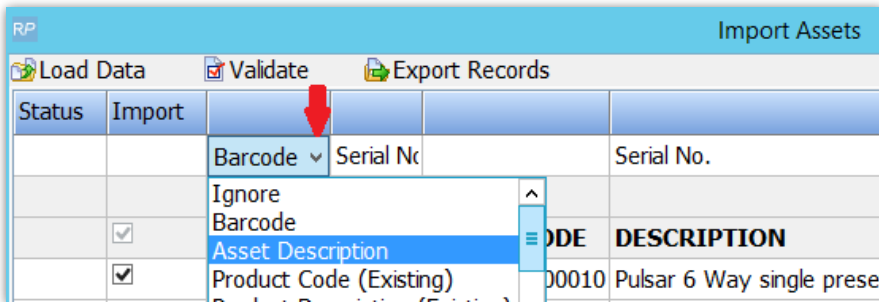


screenshots below

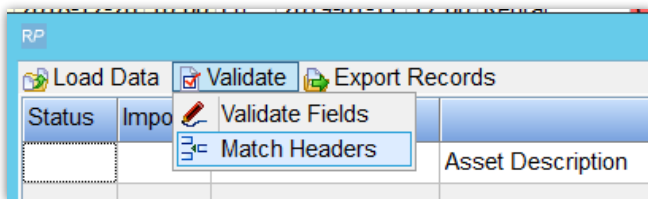




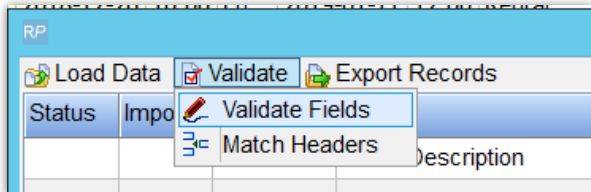
For each field loaded, the headers need to be matched to tell RentalPoint what information is in that field. You can click the right hand side of the field to reveal the down arrow and select from the field list or choose 'Ignore' to ignore that field for import....



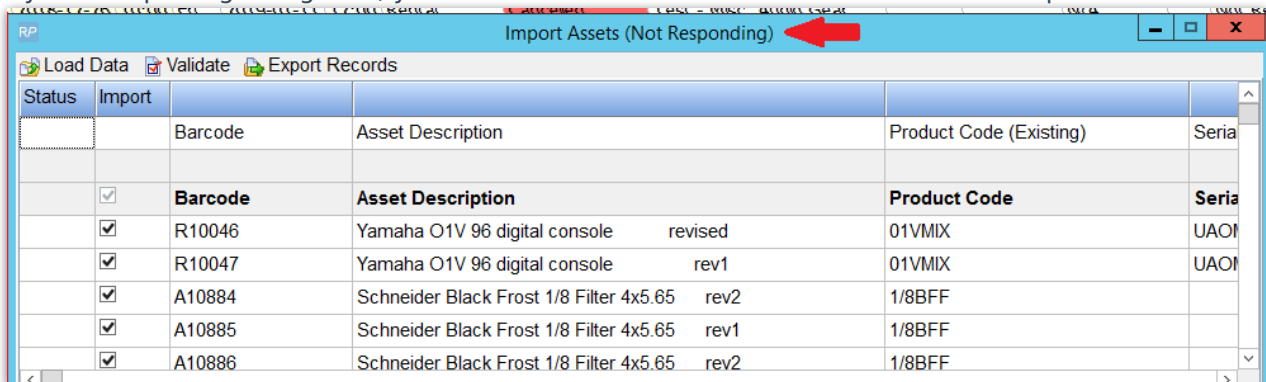
Or.....If your the headers in your csv file match the field headers that RentalPoint uses, you can use the 'Match Headers' option.



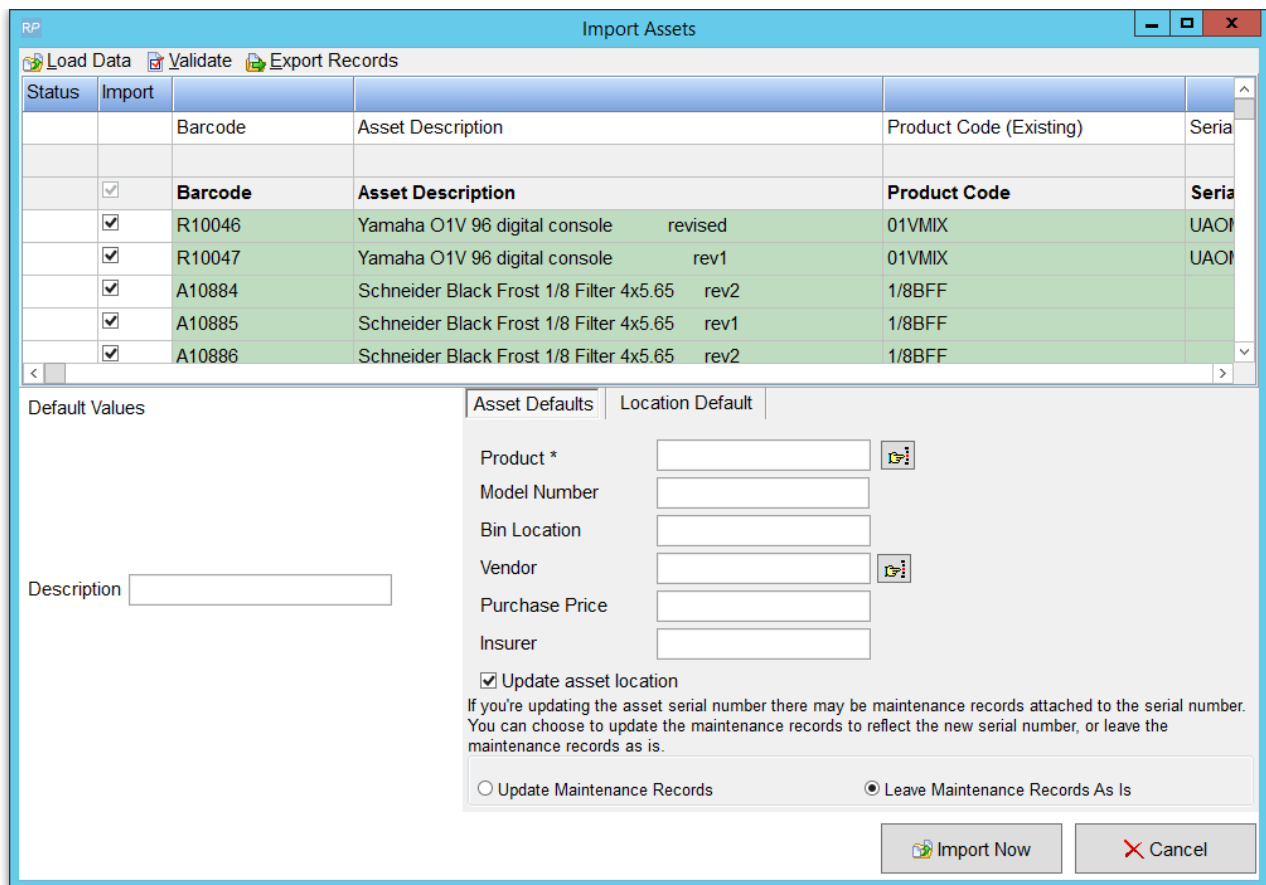
Then validate the fields to highlight any errors....



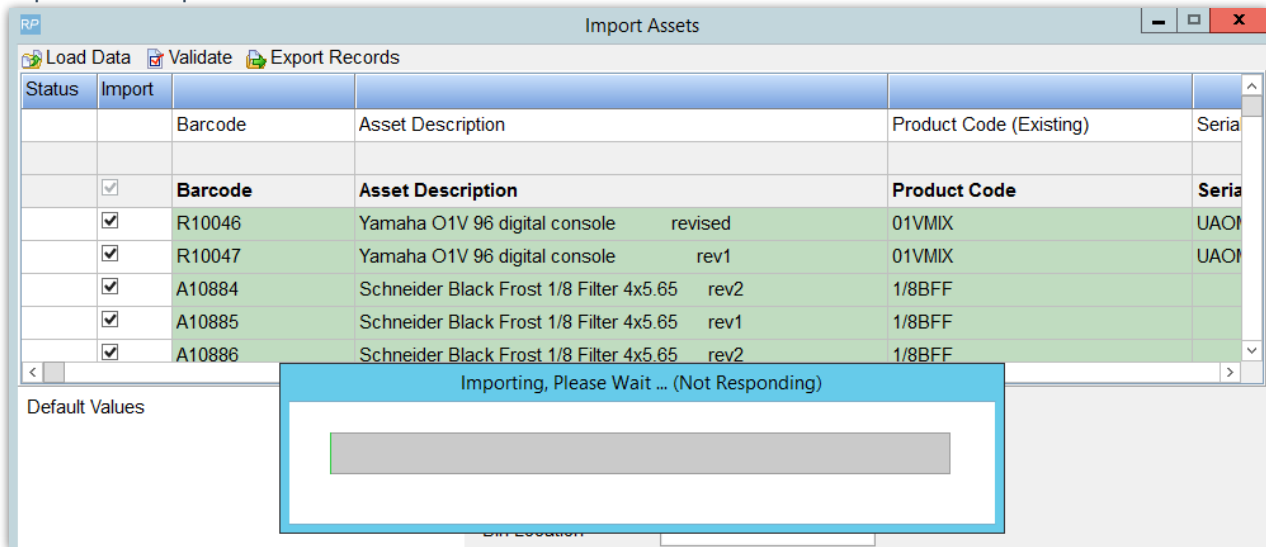
If you're importing a large file, you'll need to wait a while for the validation to complete.....



After a few minutes the items should show validated as below, click import now to import

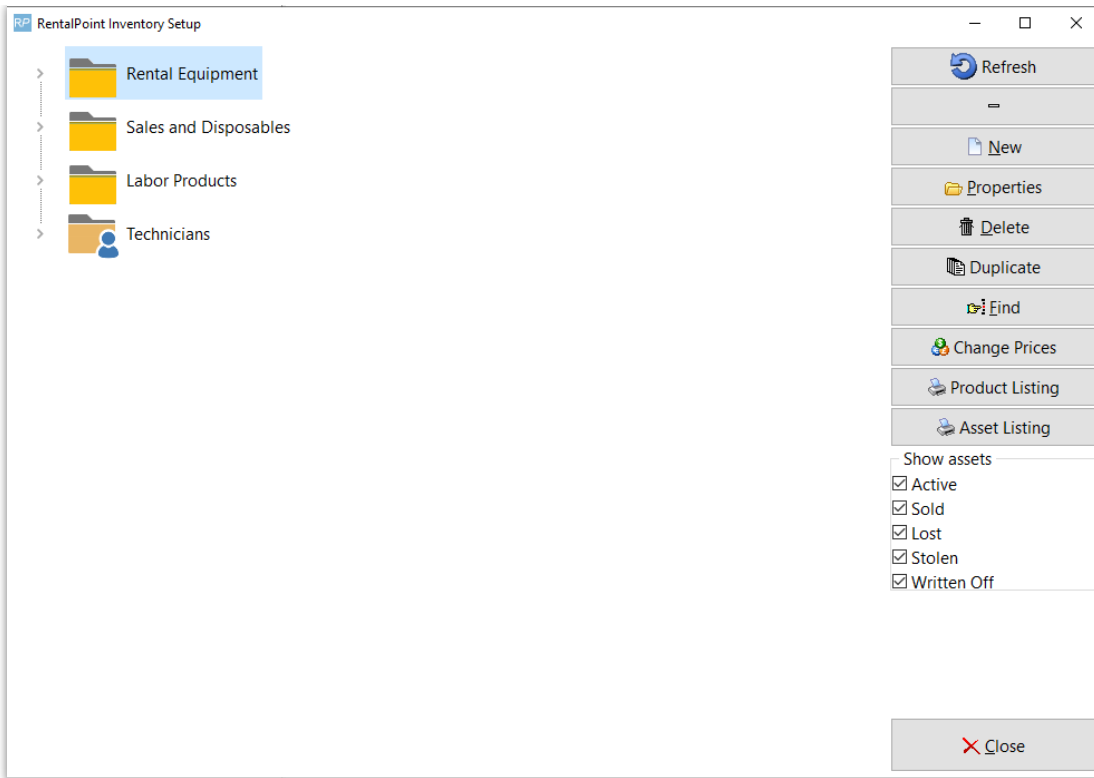


....again with a large file you'll need to wait for the 'processing' window to appear and for the import to complete



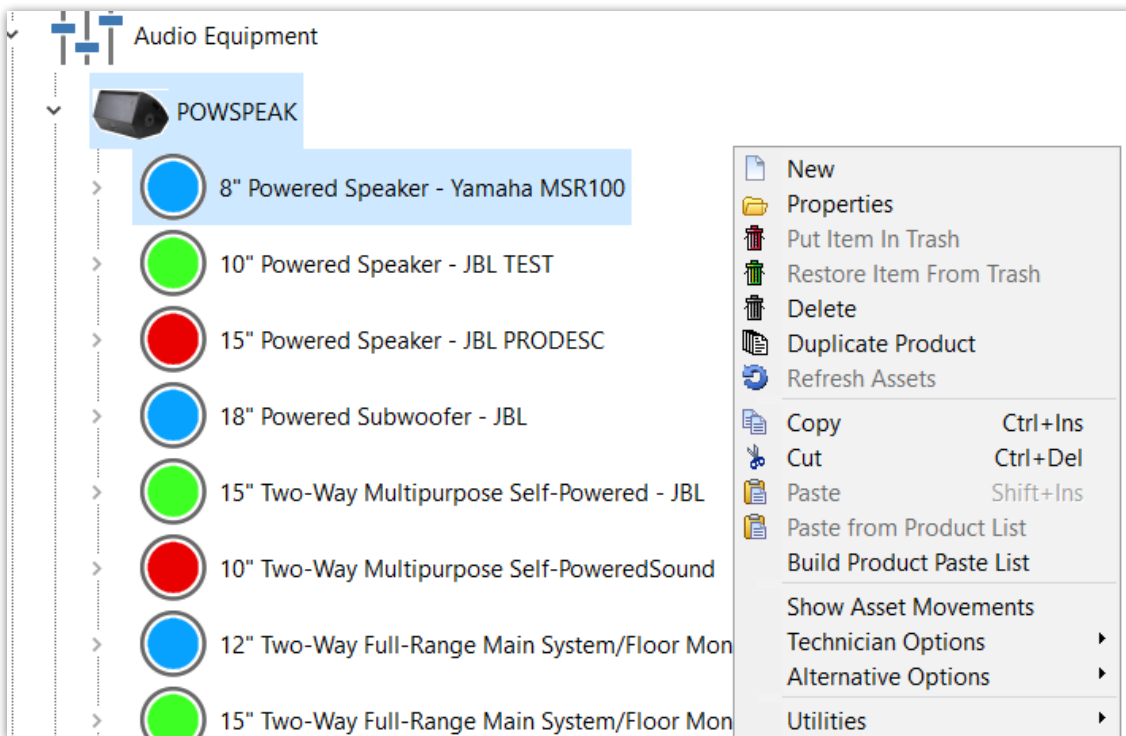
General Functions in the F10 Window

Most clients prefer to import their inventory in several large import files (see Importing Inventory section for more information), however, once that's completed you still may want to make adjustments to your inventory from time to time.




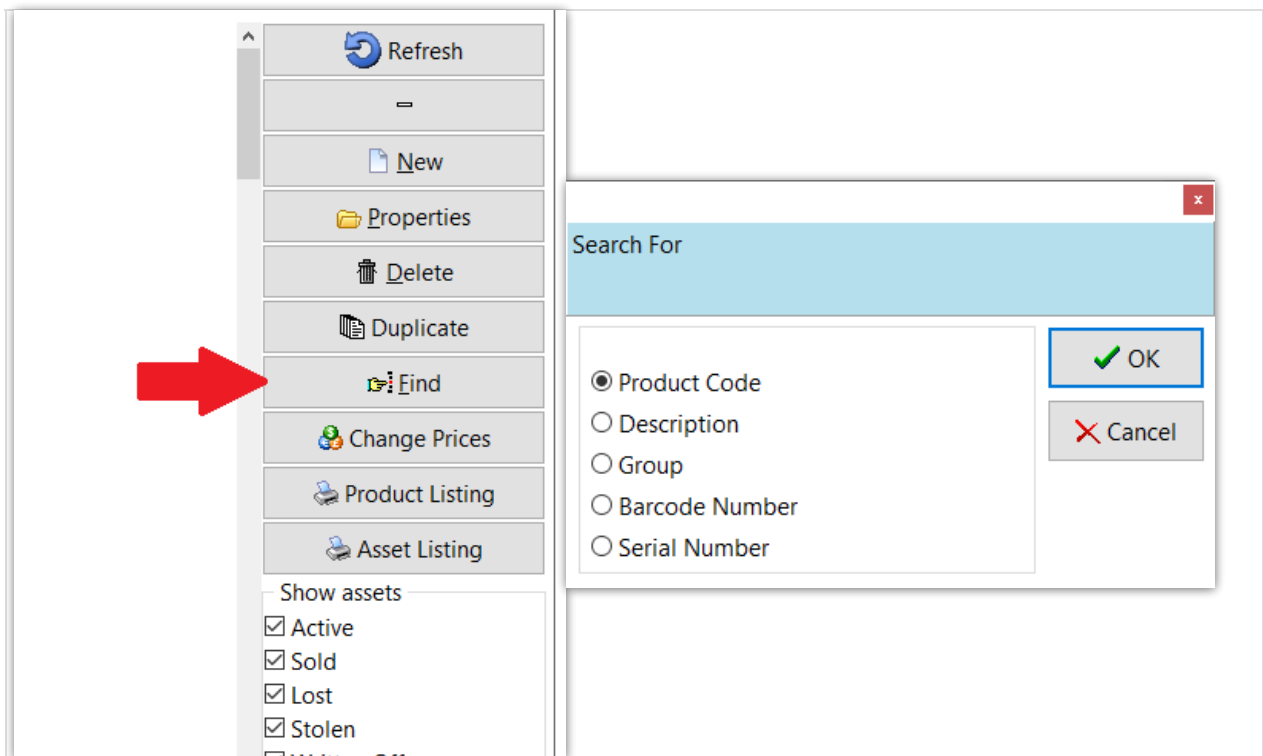
Move

To move items from folder to folder or to organize your inventory you can drag and drop the items in the treeview or you can use the right click options to cut and paste where you need them.

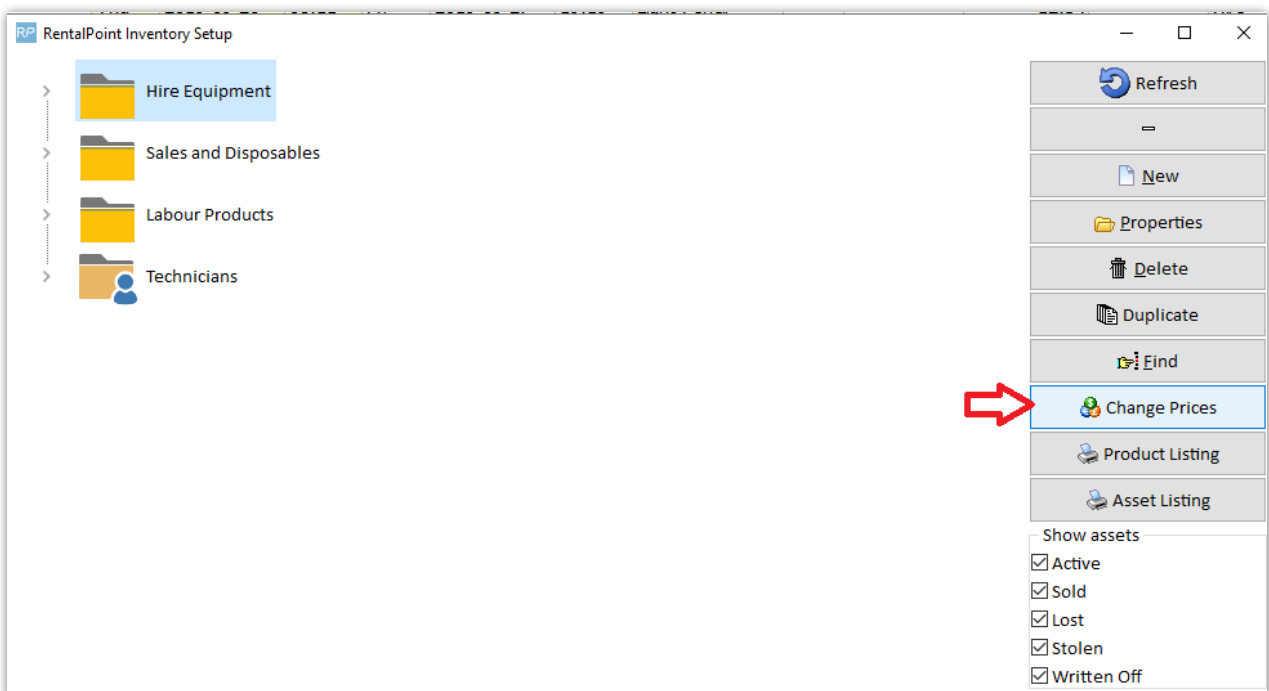


Find

To find items within your inventory simply click  **Find** or **Ctrl + F**, select the field that you want to search on and enter your criteria. If the system doesn't find an exact match for your query, it will search through all folders starting at the top of the tree and look for the keyword in the product.



Change Price Utility



- Located in the Inventory (F10) window, the Change Prices utility will increase (or decrease) the price of your products by a percentage that you set. By default the system will perform a Test Run to calculate and display the values of your inventory before you actually update.

Please be advised that there is no 'undo' function for this utility. The only means of an undo would be to restore a backup of your database.

- When using the rounding option, the system will first calculate your new prices by adding the Markup % that you choose, then rounding up or down by the factor that you select.

Change Prices

Step 1 - Select Product Type

Rentals
 Sales

Step 2 - Select Range of Products to Update

All Rental Products
 Group Selected
 Category Selected

Step 3 - Price Set and Rate Within Price Set to Update

1st Day Rate
 Weekly Rate

Step 4 - Base the Update on this Price Set and this Rate

1st Day Rate
 Weekly Rate
 Cost Price
 Retail Price
 Replacement Value

Step 5 - Select Markup

Markup %

The rate in step 4 will be multiplied by this factor. To increase a price by 10%, enter 10. To decrease the price, enter a negative figure. For example, -90 would give 10% of the base price

Step 6 - Optional Rounding Settings

Round Prices

Up / Down

Up
 Down

Round by

.05 1.0 10.0
 .10 2.0
 .50 5.0

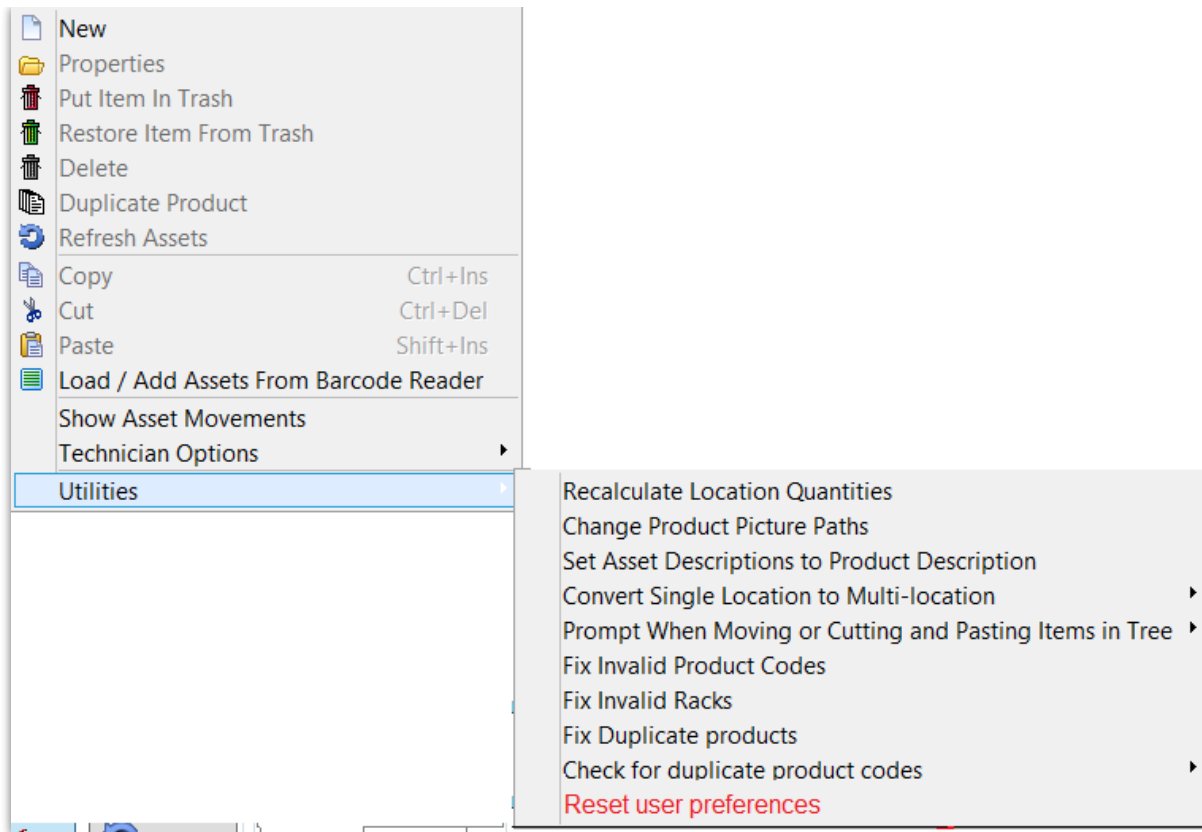
Options

Printer
 Screen
 Word Processor
 CSV

Test Run
A report will be generated but product rates will not be changed.

Inventory Utilities

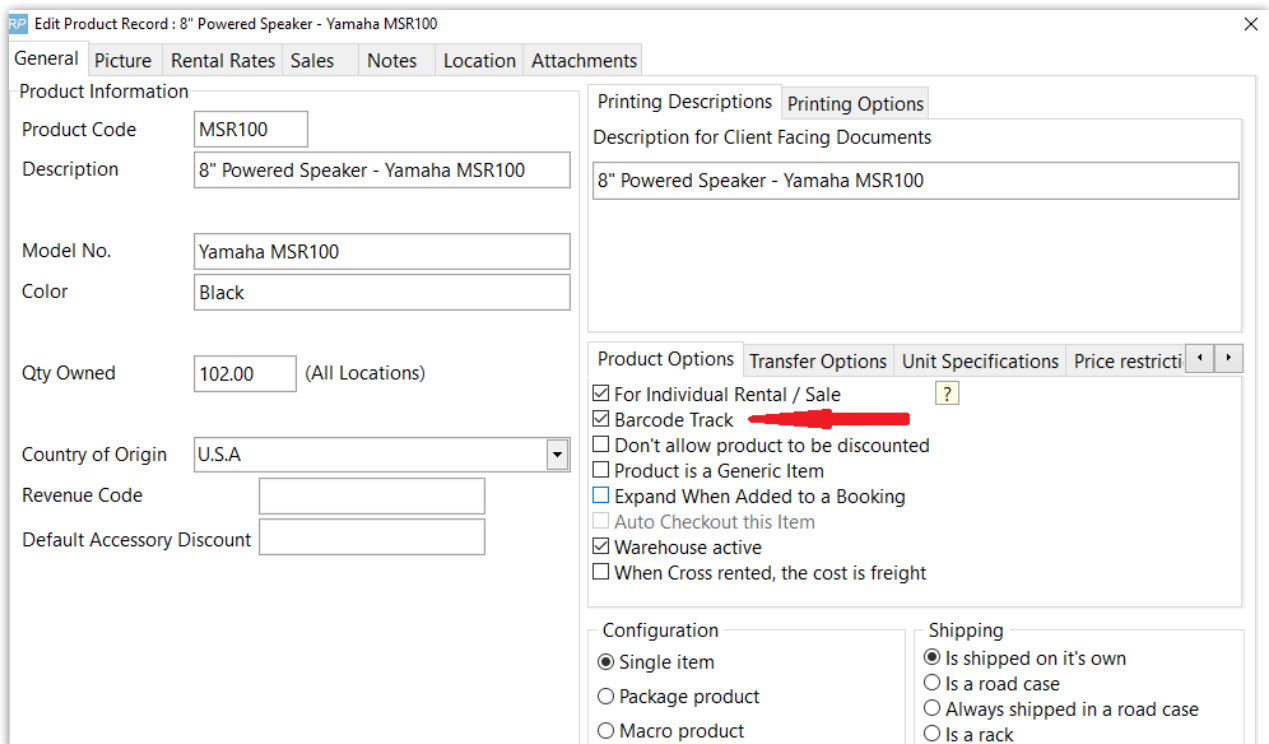
RentalPoint has a number of Inventory Utilities that can be found in Inventory Setup (F10), then right click anywhere in the Inventory Setup window.



Recalculate Rental Stock Quantity

If you have asset records for all products, then you may want to set Operational Parameter 65 to YES so that the stock quantity for each product is counted from the asset records.

You also need to set 'Barcode Track' to YES on the Product Record.



How it works

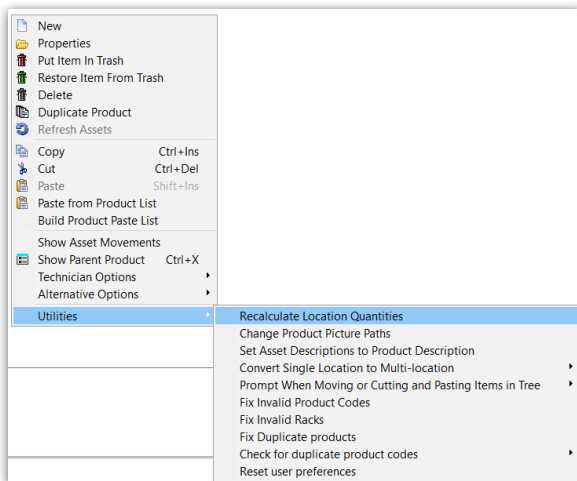
- If ALL assets records are present then this is the most reliable method to keep the product quantities accurate, if there are products with no asset records then this method will NOT be used on that product.

For example:

- There may be hundreds of products which do not have asset records (i.e. barcode tracking is NOT set for that product); in this case the quantities in the product record may be edited.
- On the other hand, if barcode tracking is set, then the qty owned is calculated from the number of assets associated with that product. Manual editing of qty owned will not be allowed.
- When this parameter is set to YES - if an asset is checked out of or returned to a different location, the asset will be moved to that location
- When the parameter is set to NO - if an asset is checked out of or returned to a different location, the the asset will NOT be moved to that location

How do I use it?

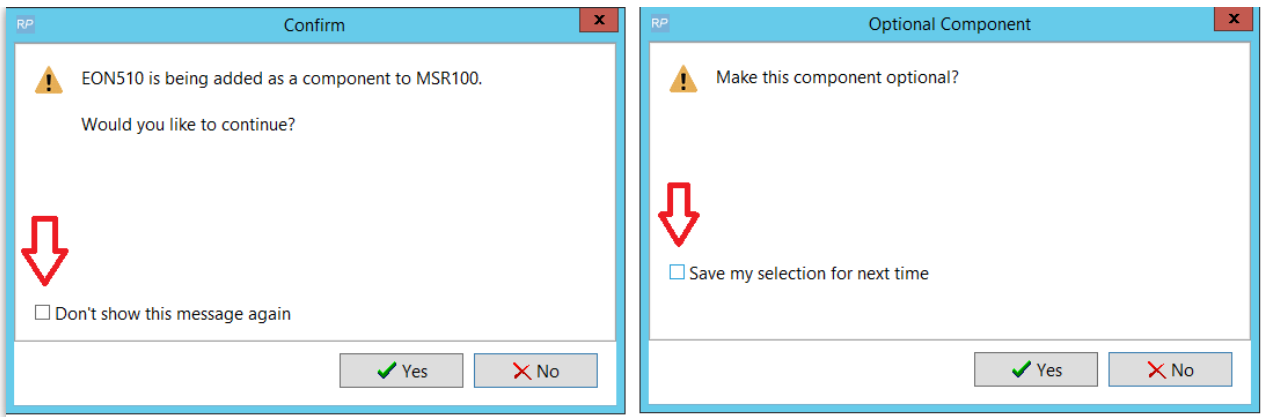
- Hit F10 to access Inventory Setup
- Right click to get actions menu
- Click utilities
- Run the utility to recalculate location/stock the stock quantities



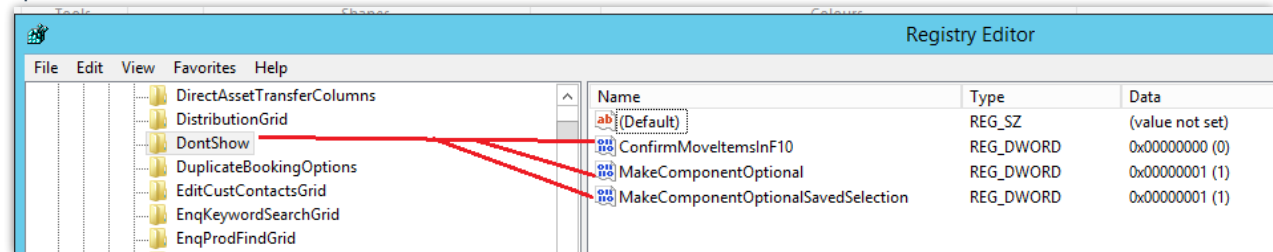
Reset User Preferences

When clicked, deletes the registry keys that affect user preferences in the product setup area effectively resetting popup options to default values.

For Example: When adding a product as a component, a number of popups appear. The user can click the checkbox 'Don't show this message again', and 'save my selection for next time' respectively.



The user preferences are written to the windows registry and 'remembered' for all subsequent operations



Reset User Preferences, deletes these registry keys so that the popup windows appear again during component setup.

Import Rental Rates

You will need these columns of information to import rental rates:

- Product Code
- Product Description
- 1st Day Rate
- Extra Day Rate
- Week Rate
- LT Rate
- Price Set #

The columns should be labelled as above so that they will be auto matched by the RentalPoint import window, otherwise you need to click on the heading of each column to identify the data in each column. The 'Price Set #' column (as set in Pricing Parameter 4) is needed even if you only have one price list, in which case a zero should be entered in the Price Set Column.

Sample csv file

rental rates test.csv - Excel

File Home Insert Page Layout Formulas Data Review View Team Tell me what you want to do...

Clipboard Font Alignment Number Styles

Calibri 11

B I U

Wrap Text

General

Conditional Formatting Table

G7

	A	B	C	D	E	F	G
1	Product Code	Product Description	1st Day Rate	Extra Day Rate	Week Rate	LT Rate	Price Set #
2	4098-18	DPA 4098 Podium Mic 1	80	80	230	460	0
3							

Others Help

Print LT rental	
Import / Export	Export Accounts
Display Log Files	Export Accounts to .CSV
Archiving	Export Customers
Utilities	Export Distribution List
Change Operator Ctrl+F3	Import Files
View Current Operators	Generate Import Templates
Operator Reports	Import Account Balances
Open a Second Copy Ctrl+Alt+O	Excel Export Builder
Operator Options	Barcode Scan Import

RP Import Files [X]

Import

Rental Products Components, Accessories, Alternatives
 Sales Products Venues
 Vendors Labour Products
 Technicians Rental Rates
 Customers Sale Prices
 Contacts Assets
 Customers and Contacts

Duplicate Records
 Skip Them
 Update Them

First Row
 Header
 Data

RP Import Rental Rates

RP Import Rental Rates [X]

Status	Import	Product Code	Product Description	1st Day Rate	Extra Day Rate	Week Rate	LT Rate	Price Set #
	<input checked="" type="checkbox"/>	4098-18	"DPA 4098 Podium Mic 18""	80	80	230	460	0

