# The Inventory Setup Window

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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.

Í

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.

RP Edit Group		×
Group Code	AUDIO	
Description	Audio Equipment	
Default Vendor	HARMON (used for purchase orders)	
Display Auto Email Setti	ngs	
Custom Group Icon (48x4		
L L Cha	ange	
	✓ OK × Cancel	

#### 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.

RP	Edit Group									×
G	iroup Code		AUDIO		]					
C	Description		Audio Equip	udio Equipment						
C	efault Vendor		HARMON		🕞 (used	l for pu	irchase	orders	)	
	Display Auto Emai	l Settir	ngs							
	First Name	Last I	Name	Email		Save	Add	Edit	Del	
	Software	Supp	ort	support@	rentp.com					
	Locate/Add		New Contac	t 🕞 Op	oen Contact	ি Ren	nove C	ontact		
							🗸 ОК		×	Cancel

### 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	POWSPEAK			
Description	Power Speakers			
Standard Cost %	10.00			
Equipment Tab Display Co	olor		○ Maroon	
○ Olive	⊖ Lime		⊖ Aqua	
This is how the selected of	olor will appear in	the grid.		
☑ Bold Font				
Custom Category Icon (48	x48)			
Cha	nge		🗸 ок	× Cancel

## 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.

₽P	lentalPoint li	nventory	Setup								- 🗆 X			
				0	[MSR100-21]	3" Powered Spe	aker	- Yamaha MSR100 [S	erial : MS1] [Model : Yamaha I		Refresh			
					[1400100.00]	N. Davidant d. Car		Versche MCD100	erial : ] [Model : ) Model : ]		-	ice No.	Revenue	Venue
					[IVISR100-22] (	s" Powered Spe	aker	- ramana wiskiou [S			🗋 <u>N</u> ew		2,839.38	Hilton Garden In
				0	[MSR100-23]	3" Powered Spe	aker	- Yamaha MSR100 [S	erial : ] [Model : Yamaha M] [		Properties		9,400.00	Hilton Toronto
			0	0	[MSR100-24]	8" Powered Spe	aker	RP Add New Asset Reco General Service In	formation Financial Details No	otes				×
			•	0	[MSR100-25]	3" Powered Spe	aker	Barcode	MSR100-29	)				
				0	[MSR100-26]	3" Powered Spe	aker	Description	8" Powered Speaker - Yamaha M	MSR100				
								Model Number	Yamaha MSR100					
			Ċ		[MSR100-27]	3" Powered Spe	aker	Stock Number	111					
				0	[MSR100-28]	3" Powered Spe	aker	Serial Number						
								Vendor	[a					
				Acce	essories			PO Number	D-1					
		>		Alte	rnatives			Bin Location						
		> (		10" Pow	ered Speaker	BL TEST		Quantity	10 (4)					
		> (	Õ	15" Pow	ered Speaker - J	BL PRODESC								
		> (		18" Pow	ered Subwoofe	r - JBL								
c			$\tilde{}$				_	Home Location	Location 0 - Toronto	-				
	TAVUUUUZ	-										_		
-	IN00004				cial Corporation				Location			6		
5T0	8000	BRIST	TOL-N	1YERS SQ	UIBB		_	Warehouse Location	0 - Toronto	•		Ĭ		
que	nce			Eilters			_							
it Da	ate and Tin	ne		☐ Quotes ☐ Light Pend	⊡ Hire :il ☑ Sales	✓ Booked ✓ Pull	NN					🗸 ок		X Cancel

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

RentalPoint Invent	tory Setup		
		0	[MSR100-27] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
		0	[MSR100-28] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
		0	[MSR100-29] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
		0	[MSR100-30] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
		0	[MSR100-31] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
New		0	[MSR100-33] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
Assets Added		0	[MSR100-34] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
		0	[MSR100-35] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
		0	[MSR100-36] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
		0	[MSR100-37] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
		0	[MSR100-38] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]
	•	0	[MSR100-39] 8" Powered Speaker - Yamaha MSR100 [Serial : ] [Model : Yamaha M] [Location : 0 - Toronto] [Status : In Warehouse]

# **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.

\_p Others Help Print LT rental э. Import / Export Export Accounts Display Log Files ۲ Export Accounts to .CSV nar Archiving ۲ Export Customers . Export Distribution List Utilities ۲ ٠ Ctrl+F3 Import Files Change Operator View Current Operators Generate Import Templates qui Operator Reports Import Account Balances Open a Second Copy Ctrl+Alt+O Excel Export Builder PC Operator Options Barcode Scan Import ۲ 9" Doworod Sponker Vomaha MCD

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.

Re Import Files			×
Import		_	
Rental Products		C Component	s, Accessories, Alternatives
C Sales Products		O Venues	
O Vendors		C Labor Produ	ucts
C Technicians		C Rental Rates	s
C Customers		C Sale Prices	
C Contacts		C Assets	
C Customers and Contac	ts		
Duplicate Records	First Row		File Format
C Skip Them	Header     Hea		Comma Separated (.CSV)
Opdate Them	C Data		C Tabular Delimited
		_	
			✓ Next × Cancel

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.

import Fields	RentalPoint Fields Mate	ching Fields corresponding Rentalpoint field (if the field nam already match, just click MATCH ALL button below
Product Group	Product Group	Product Group
Group Description Product Category	Product Category	Product Category
Category Description	Product Sub Category	
Product Code	Product Code	Product Code
Quantity Owned Product Description	Product Description	Product Description
Printed Description	Part Number	Part Number
Rate1st Day Rate Week		
Unit Volume	Quantity Owned	Quantity Owned
Unit Weight	Country of Origin	Country of Origin
Unit Length	Non Tracked Bar Code	Non Tracked Barcode
Unit Width	Default Accessory Discount	
Unit Height Country of Origin	Revenue Code	
Cost price		
Inventory Import Options		
there may be maintenance records atta maintenance records to reflect the new	asset information. If you're updating the asset serial number ched to the serial number. You can choose to update the r serial number, or leave the maintenance records as is.	
C Update Maintenance Records	Leave Maintenance Records As Is	

## **Importing Assets**

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

Others Help			
Print Cycle billed			
Import / Export	>	Export Accounts	
Display Log Files	>	Export Accounts to .CSV	
Archiving	>	Export Customers >	Date
Utilities	>	Export Distribution List	201
Change Operator (	Ctrl+F3	Import Files	201
View Current Operators		Generate Import Templates 🧹	
		Import Account Dalancos	-

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

Ot	h <u>e</u> rs <u>H</u> elp					
	Print Cycle billed					
	Import / Export	+	Export Accounts			
	Display Log Files	•	Export Accounts to .CSV			
[ ]	<u>A</u> rchiving	•	Export Customers +			
-	Extend License Date		Export Distribution List			
-	<u>U</u> tilities	•	Import Files			
-	Change Operator	Ctrl+F3	Generate Import Templates			
<b>1</b>	View Current Operator		Import Account Balances			
	Operator Reports Open a Second Copy		Excel Export Builder			
coroonchoto bolow	Operator Options	. 1	Barcode Scan Import			
screenshots below t			n 2019-02-11 12:00 Rental C			
RP	Impo	ort Files	~			
Import						
O Rental Products		O Componer	nts, Accessories, Alternatives			
○ Sales Products		○ Venues				
○ Vendors		○ Labor Products				
O Technicians		○ Rental Rates				
○ Customers		○ Sale Prices				
○ Contacts		Assets				
O Customers and Con	tacts					
Duplicate Records	First Row					
○ Skip Them	<ul> <li>Header</li> </ul>					
<ul> <li>Update Them</li> </ul>	⊖ Data					
			✓ Next × Cancel			

RP	
🔂 Load Data 🗟 Validate 🔒	Export Records
🔋 📔 Paste From Clipboard	
👌 From .CSV File	
	-

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....

RP							Import Assets
🔊 Load 🛙	Data	🖻 Validate	Validate 🔄 🔂 Export Records				
Status	Import						
		Barcode 🗸	Serial No				Serial No.
		Ignore			^		
	<b>V</b>	Barcode Asset Desc	cription			DE	DESCRIPTION
	✓	Product Code (Existing)				00010	Pulsar 6 Way single preset

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

RP					.,	
😼 Load [	Data	۱ 🖌	/alidate	🔒 Export I	Re	cords
Status	Impo		Validate			
		3-	Match H	leaders		Asset Description

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

😼 Load [	Data	<u>ک</u> ا	Validate	Ð	Export I	Records
Status	Impo	l,	Validate	Fie	elds	
		3-	Match H	lea	ders	escription

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

🍌 Load	Data 🛃	Validate 🔒 Expo	rt Records		
Status	Import				
		Barcode	Asset Description	Product Code (Existing)	Seria
		Barcode	Asset Description	Product Code	Seri
	✓	R10046	Yamaha O1V 96 digital console revised	01VMIX	UAO
	✓	R10047	Yamaha O1V 96 digital console rev1	01VMIX	UAC
	✓	A10884	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF	
	✓	A10885	Schneider Black Frost 1/8 Filter 4x5.65 rev1	1/8BFF	
	<ul> <li>Image: A start of the start of</li></ul>	A10886	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF	

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

R <i>P</i>				Import A	ssets		_ 🗆 X
<u>r ∐</u> oad	Data 🛃	Validate 🛛 🔒 Export Re	ecords				
Status	Import						<u>^</u>
		Barcode	Asset Descr	iption		Product Code (Existing)	Seria
	<b>V</b>	Barcode	Asset Desc	ription		Product Code	Seria
	✓	R10046	Yamaha O1	/ 96 digital console	revised	01VMIX	UAOI
	✓	R10047	Yamaha O1	/ 96 digital console	rev1	01VMIX	UAOI
	✓	A10884	Schneider B	lack Frost 1/8 Filter 4x5.	65 rev2	1/8BFF	
	✓	A10885	Schneider B	lack Frost 1/8 Filter 4x5.	65 rev1	1/8BFF	
<	✓	A10886	Schneider B	lack Frost 1/8 Filter 4x5.	65 rev2	1/8BFF	×
Default				Product * Model Number Bin Location Vendor Purchase Price Insurer ✓ Update asset locat If you're updating the asset	et serial number there may b e the maintenance records to s.		or leave the

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

Status	Import				
		Barcode	Asset Description	Product Code (Existing)	Seria
	Image: A state of the state	Barcode	Asset Description	Product Code	Seria
	✓	R10046	Yamaha O1V 96 digital console revised	01VMIX	UAO
	✓	R10047	Yamaha O1V 96 digital console rev1	01VMIX	UAO
	✓	A10884	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF	
	✓	A10885	Schneider Black Frost 1/8 Filter 4x5.65 rev1	1/8BFF	
<	✓	A10886	Schneider Black Frost 1/8 Filter 4x5.65 rev2 Importing, Please Wait (Not Responding)	1/8BFF	>
Default	Values		importing, riease wait (Not responding)		

## 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.

<ul><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li><li><sup>+</sup></li>&lt;</ul>	Audio E	quipment			
~ {	POV	SPEAK			
>	$\bigcirc$	3" Powered Speaker - Yamaha M	SR100	New Properties	
>	$\bigcirc$	10" Powered Speaker - JBL TEST		Restore Item From	Trash
		15" Powered Speaker - JBL PROD	DESC	Duplicate Product	
>	$\bigcirc$	18" Powered Subwoofer - JBL			Ctrl+Ins Ctrl+Del
		15" Two-Way Multipurpose Self-	-	Paste	Shift+Ins
>		10" Two-Way Multipurpose Self-	PoweredSound	Build Product Paste	
		12" Two-Way Full-Range Main Sy	/stem/Floor Mon	Show Asset Moven Technician Options Alternative Options	•
>		15" Two-Way Full-Range Main Sy	/stem/Floor Mon	Utilities	•

Find

To find items within your inventory simply click **r**<sup>•</sup> <u>Find</u> 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.

Step 1 - Select Product	Туре	Options
Rentals		Printer
_		C Screen
C Sales		C CSV
Step 2 - Select Range	of Products to Update	
All Rental Products		✓ Test Run
C Group Selected		A report will be generated but product rates will not
C Category Selected		be changed.
Step 3 - Price Set and 1st Day Rate	Rate Within Price Set to Update	
C Weekly Rate	Standard price 3 day WK	•
<ul> <li>Step 4 - Base the Upd</li> <li>Ist Day Rate</li> </ul>	ate on this Price Set and this Rate	
C Weekly Rate	Standard price 3 day WK	•
C Cost Price		
C Retail Price		
C Replacement Value		
Keplacement value	•	
Step 5 - Select Markup		
Markup % 0		
The rate in step 4 will	be multiplied by this factor. To increase a	
	10. To decrease the price, enter a negative 90 would give 10% of the base price	
inguici i or example,	so hourd give 10 % of the base price	
Step 6 - Optional Roun	ding Settings	
Dound Drices	Round by	
Round Prices		
Up / Down		

## **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.

RP Edit Product Record :	8" Powered Speaker - Yar	naha MSR10	0	X
General Picture R	ental Rates Sales	Notes	Location	Attachments
Product Information	n			Printing Descriptions Printing Options
Product Code	MSR100			Description for Client Facing Documents
Description	8" Powered Speak	ær - Yama	ha MSR100	8" Powered Speaker - Yamaha MSR100
Model No.	Yamaha MSR100			
Color	Black			
Qty Owned	102.00 (All L	ocations)		Product Options       Transfer Options       Unit Specifications       Price restricti       •         Image: Specification of the system of the sy
Country of Origin	U.S.A			Don't allow product to be discounted     Product is a Generic Item
Revenue Code				Expand When Added to a Booking
Default Accessory [	Discount			<ul> <li>Auto Checkout this Item</li> <li>Warehouse active</li> <li>When Cross rented, the cost is freight</li> </ul>
				Configuration
				Single item     Is shipped on it's own
				Package product     O Is a road case     O Always shipped in a road case
				O Macro product O Is a rack

• 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

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File E	dit View F	Favorites Help					
	🌆 🛛	DirectAssetTransferColumns	^	Name	Туре	Data	
	🌆 🛛	DistributionGrid		ab (Default)	REG_SZ	(value not set)	
		DontShow		ConfirmMoveltemsInF10	REG_DWORD	0x00000000 (0)	
	🌆 🛛	DuplicateBookingOptions			REG DWORD	0x0000001 (1)	
	🌆 🛛	EditCustContactsGrid		MakeComponentOptionalSavedSelection	REG DWORD	0x00000001 (1)	
	🌆 🛛	EnqKeywordSearchGrid		~	-		
		EnqProdFindGrid					

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

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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							

Oth	ers	Help		
	Prin	nt LT rental		
	Imp	oort / Export	>	Export Accounts
	Dis	play Log Files	>	Export Accounts to .CSV
	Arc	hiving	>	Export Customers
	Util	ities	>	Export Distribution List
	Cha	ange Operator Ctrl+F3		Import Files
	Vie	w Current Operators		Generate Import Templates
	Оре	erator Reports	>	Import Account Balances
	Ope	en a Second Copy Ctrl+Alt+O		Excel Export Builder
	Ope	erator Options	>	Barcode Scan Import

<ul> <li>Rental Products</li> <li>Sales Products</li> <li>Venues</li> <li>Venues</li> <li>Vendors</li> <li>Labour Products</li> <li>Technicians</li> <li>Rental Rates</li> <li>Customers</li> <li>Sale Prices</li> <li>Contacts</li> <li>Assets</li> <li>Customers and Contacts</li> </ul> Duplicate Records <ul> <li>First Row</li> <li>Skip Them</li> <li>Header</li> <li>Data</li> </ul> Import Rental Rates <ul> <li>Load Data</li> <li>Validate</li> <li>Export Records</li> <li>From .CSV File</li> <li>From .CSV File</li> <li>From .CSV File</li> </ul>	Sales Products       O Venues         Vendors       O Labour Products         Technicians       Image: Rental Rates         Customers       O Sale Prices         Contacts       O Assets         Customers and Contacts       First Row	es
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