

Activities

Last Modified on 23/08/2021 2:05 pm EDT

Operator Privileges Affecting Activities

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

The screenshot shows a software window titled "Edit Group Record : ADMINISTRATOR". The window has a menu bar with the following items: Group Name, Bookings, Cross rentals and 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, and Booking Scope. The "Crew and Activities" tab is selected. The window is divided into two main sections. The left section is titled "Crew" and contains several checkboxes: Can View Crew, Can Modify Crew, Can Assign a Qualified Technician, Can Assign an unqualified Technician, Can Access Crew Planner, Can Override Minimum Crew Hours, Can Edit Job Description List, Can change date/time of crew assignments after a technician is assigned, Can decrease booking progress status when technicians are assigned, Assign POs to internal technicians, and RP WebServices – Activate Technician Logins. The right section is titled "Activities" and is highlighted with a red box. It contains a sub-section "Activity Permissions" with three radio button options: 1. Can modify all activities, 2. Can modify only their activities, and 3. Cannot modify any activities. Below this are two more checkboxes: Delete Activities and Allow Deletion of Old Records. At the bottom of the window, there is a toolbar with buttons for "All", "Clear All", "All In Tab", "Clear All In Tab", "Find", "OK", and "Cancel".

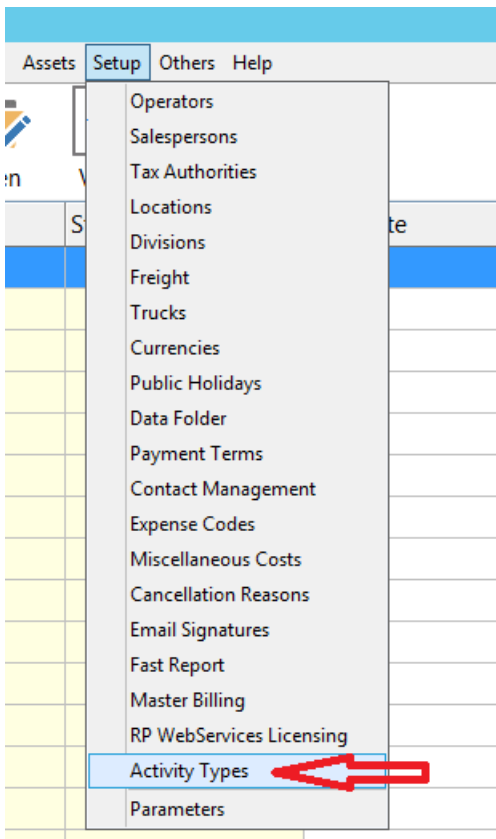
Parameters Affecting Activities

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:

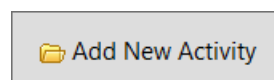
Option 1:

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

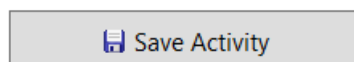
Complete the Schedule Activity dialog box then save. See Fig. 2.0, 3.0 and 4.0.

Option 2:

1. Complete the Quick Add Activity section that is located left of the



2. Click on the



button.

Option 3:

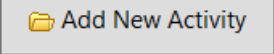
1. Click on the  button. See Fig. 1.0 below
2. Complete the Schedule Activity dialog box then save. See Fig 3.0 below

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

Option 4:

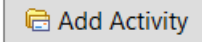
1. Click on the  button on the Customer Tab, then complete the details for the activity and save

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
 Organisation: Francis Hinkley
 Web: Email:
 Street Address: Postal address
 Street: 8877 Cabbot Trail To Postal To Contacts
 City: Newmarket State: Ontario
 Country: Canada Postal Code: H3L6T2

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

+ 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

Fig 3.0 Activity Window

RP Schedule Call

Activity Details Notes

Activity: Call Back

Description: [Empty]

Company: [Empty]

Contact: [Empty]

Operator: RP

Ask For: [Empty]

Start: 07-29-17 1941

End: 07-29-17 1941

Last Contacted: 07-29-17 1941

Link Activity To

Booking: [Empty]

Project: [Empty]

Alarm

Message: [Empty]

Date: 07-29-17

Time: 1941

My Calendar Save Cancel

Create New Activity from 'To Do Menu'

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

Contact Name	Contact Phone	Description	Start Date	Notes	Alarm Date	Contact Type
Thomas O'Reilly		Follow up on Quote	8/23/2021 1343			Customer / Booking

1. Double Click to open

RP Schedule Call

Activity Details

Activity: Call Back

Description: Follow up on Quote

Company: Francis Hinkley

Contact: Thomas O'Reilly

Operator: RP

Ask For:

Start: 08/23/21 1343

End: 08/23/21 1400

Last Contacted: 08/23/21 1343

Link Activity To

Booking: FHINK00005

Project:

Alarm

Message:

Date: 08/23/21

Time: 1344

My Calendar

Save Cancel

Quick Add Activity

Activity Type: First Call

Description:

Contact:

Operator: RP

Delete a Scheduled Activity

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

RP

Actions Reports Crystal Reports Assets Setup Others Help

Bookings New Open View Work

Start Date	Start Time	End Date	End Time	Activity	De
07/27/17	0000	07/29/17		Busy in Warehouse	Sto

Shortages

Customers

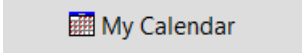
Products

Admin

- Delete Activity
- Scan for Duplicate Contacts
- Transfer Links
- Import Activities
- Tracking
- Set Distribution Options

Complete a Scheduled Activity

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

2. Click on the  button.

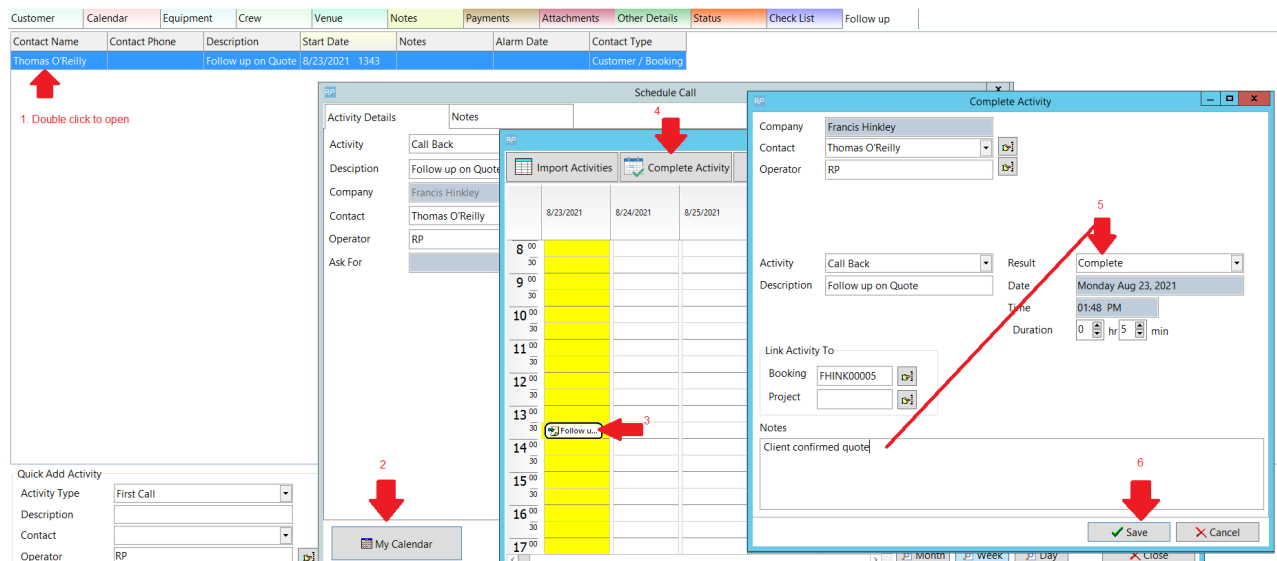
3. Find task/activity from the calendar. Click once on the item to highlight.

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.

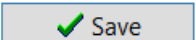
6. Click on the  button.

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

The screenshot shows the RentalPoint 11.3.2.6 interface. A 'Schedule Unavailable' dialog box is open, with the 'Activity' dropdown set to 'Unavailable'. Below it, a 'Contact Search' window is also open, showing search criteria for 'software support' and a single search result: 'Software Suppl' with contact email 'support@rentp'. A red arrow points from the search result to the 'Contact' field in the 'Schedule Unavailable' dialog. The 'To-Do' icon in the bottom left is also highlighted with a red arrow.

Set the technicians schedule of unavailability

RP Schedule Unavailable

Activity Details	Notes	Recurring
Activity: Unavailable		Start: 19-08-21 0000
Description: Tech is not available		End: 19-08-21 2359
Company:		Last Contacted: 19-08-21 1453
Contact: Software Support		Link Activity To:
Operator: RP		Booking:
		Project:
		Alarm:
		Message:
		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																																																																																				
<p>August 2019</p> <table border="1"> <thead> <tr><th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th></tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td></tr> <tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr> <tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr> <tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr> <tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr> </tbody> </table>		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	<p>August 2019</p> <table border="1"> <thead> <tr><th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th></tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td></tr> <tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr> <tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr> <tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr> <tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr> </tbody> </table>	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
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<p>Frequency</p> <p><input type="radio"/> None</p> <p><input type="radio"/> Every 1 Days</p> <p><input checked="" type="radio"/> Every 1 Weeks</p> <p><input type="radio"/> Every 1 Months</p> <p><input type="radio"/> Every 1 Years</p> <p><input type="checkbox"/> Skip Weekends</p>		<p>Scheduling Recurring Activities</p> <p>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.</p>																																																																																				

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....

The screenshot displays the RentalPoint 11.3.2.6 Crew Planner interface. The main window shows a weekly schedule grid with columns for days of the week and time slots. A technician, identified as 'Software Support' with ID 'M', is shown as unavailable from 00:00 to 23:59 on Wednesday, Thursday, and Friday. A tooltip over the unavailable period reads: 'Tech is not available', 'Unavailable', '00:00 to 23:59', and 'Software Support'. The interface includes a top menu bar with options like 'Reports', 'Crystal Reports', 'Assets', 'Setup', 'Others', and 'Help'. A left sidebar contains navigation icons for 'Bookings', 'Shortages', 'Customers', 'Products', 'Venues', 'Schedule', 'Crew Planner', 'Vendors', 'POs', 'PCs', 'Contacts', and 'To-Do'. A right sidebar features a search function for technicians, a filter section with checkboxes for 'In House', 'Agency', and 'FreeLance', and buttons for 'Technicians Planner' and 'Send SMS/E-MAIL'. The bottom status bar shows 'All', 'Operator: Rp', 'Salesperson: Rp', and 'Location: 0 - Toronto'.

Activity List Report