

Cancel a Booking

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What happens when a Booking is Cancelled

- Any cross rentals associated with the booking will be affected
- Any purchase orders associated with the booking will be affected
- Transfers will be affected
- If items have been checked out against this booking the system will automatically reverse these
- If the booking is invoiced then the system will automatically generate a credit against this invoice. This credit is generated even if there is a payment against the invoice.
- Equipment and labour will be unreserved
- When using the crew planner or contact management module activities associated with the cancelled booking will either be deleted or completed. This option can be set in the parameter setup, operational #142.

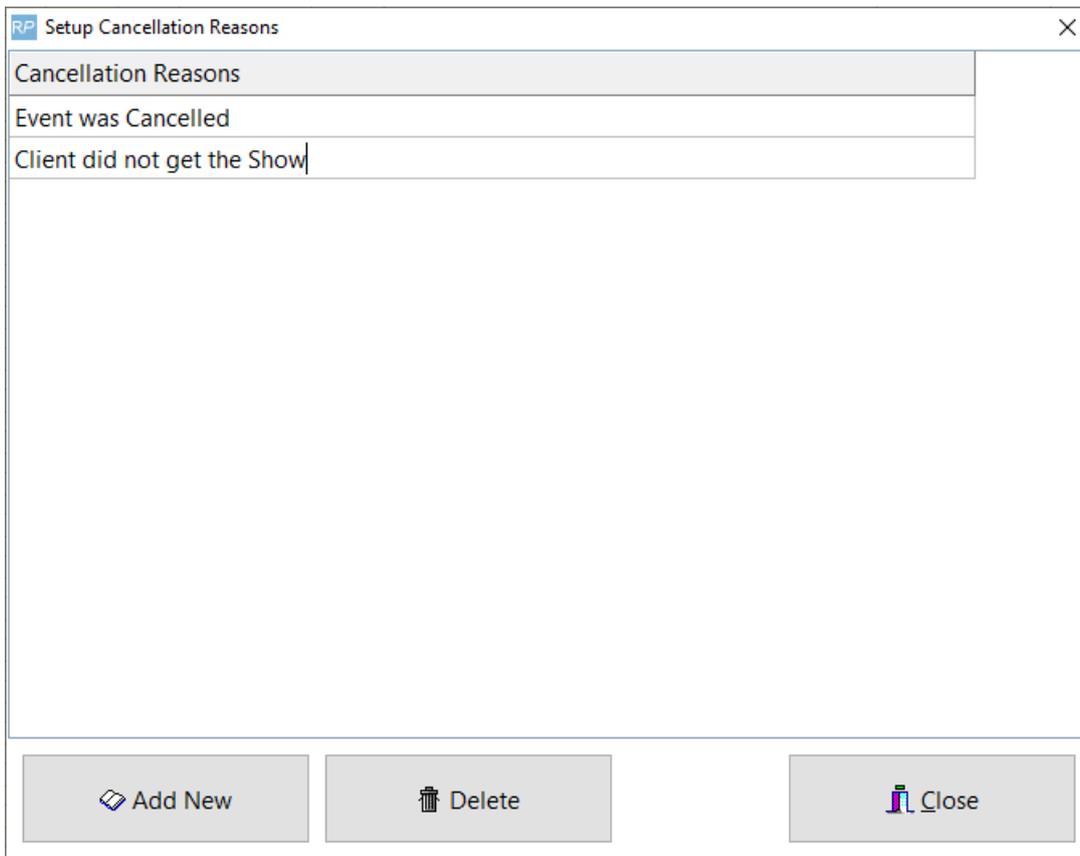
Cancellation Reasons

The option is available to set up a list of predetermined cancellation reasons via

RentalPoint 11.3.3.10

Actions Reports Crystal Reports Assets **Setup** Others Help

				Operators
Bookings	New	Find	Open	Salespersons
	Code	Organisation		Tax Authorities
Shortages	TIDEWATR00003	Tidewater B		Locations
	FREECAN00002	Freescale Se		Divisions
Customers	FREE00002	Freescale Se		Freight
	BRIST00003	BRISTOL-M		Trucks
Products	IBMCA00001	IBM Canada		Rooms
	CHESABAR00003	Chesapeake		C.M.P
Venues	FREECAN00003	Freescale Se		Currencies
	IBMCA00004	IBM Canada		Public Holidays
Schedule	CHESABAR00006	Chesapeake		Data Folder
	FIRSTFIN00003	First America		Payment Terms
Crew Planner	CHESABAR00007	Chesapeake		Contact Management
	HILCHESA00002	Hilton Garde		Expense Codes
	CHESABAR00012	Chesapeake		Miscellaneous Costs
	THOMAS00004	James Thorn		Cancellation Reasons
	FIRSTFIN00002	First America		Email Signatures
	FRFF00003	Freescale Se		Fast Report
				RP WebServices Licensing
				Activity Types
				Target Margins
				Parameters



These reasons will be available via a drop down menu when cancelling the booking

Cancelled Bookings along with their Cancellation Reason are stored in TblCancelBR.

You can remove Cancellation reasons from the cancellation table, so that it no longer appears in the drop down reason list (see screenshot above). The reason will still show up in the Cancelled Booking Reason report against any bookings it has already been used on.

[Excel Query Builder](#) can be used to execute the queries below OR run them in SQL Server Management Studio against your RentalPoint Database

Use the following query to pull a distinct list of cancellation reasons used against bookings to date

- select DISTINCT(REASON) from tblcancelbr order by reason

The query below will show all reasons set up via setup-->Cancellation Reasons

- SELECT Reason, ID
FROM tblCancelBR
WHERE booking_no = "
ORDER BY Reason

Cancelling the Booking

Canceling a booking can be accomplished in multiple ways.

Option 1:

You may set the status to *Cancelled* within the booking via the status tab. However, if the status is greyed out here, you'll need to cancel from the menu per instructions in section 2 below, so that the cancellation can be properly processed.

The status may be grayed out for the following reasons:

- The booking has been invoiced
- Cross rentals/Transfers/PO's are attached to the booking
- Any items on the booking are checked out
- The booking has been returned

The screenshot shows the 'Modify booking' interface. At the top, it displays booking details: 'Out 23/05/14 0800 In 05/06/14 1702 FREE00002 Location 0 - Toronto'. Below this is a navigation bar with tabs: Customer, Calendar, Equipment, Crew, Venue, Notes, Payments, Attachments, Other Details, Status, and Followup. The 'Status' tab is active, showing a dropdown menu with the following options:

- Quote (equipment NOT reserved, no warnings)
- Light Pencil booking (equipment NOT reserved, some warnings)
- Heavy Pencil booking (equipment reserved, must be confirmed by date)
- Confirmed booking (equipment reserved, P.O. or other document required)
- Cancelled (equipment NOT reserved, no warnings)

Below the status options, there are fields for 'Confirmation Required By' (16/05/14) and 'Date and Time Booked' (20/05/14 13:01:08). A red arrow points to the 'Cancelled' option in the status dropdown.

Option 2:

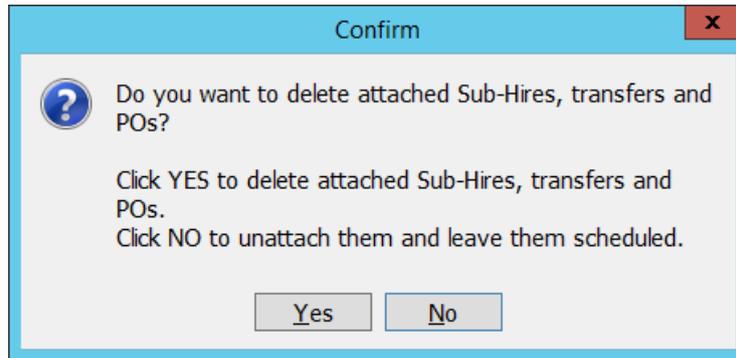
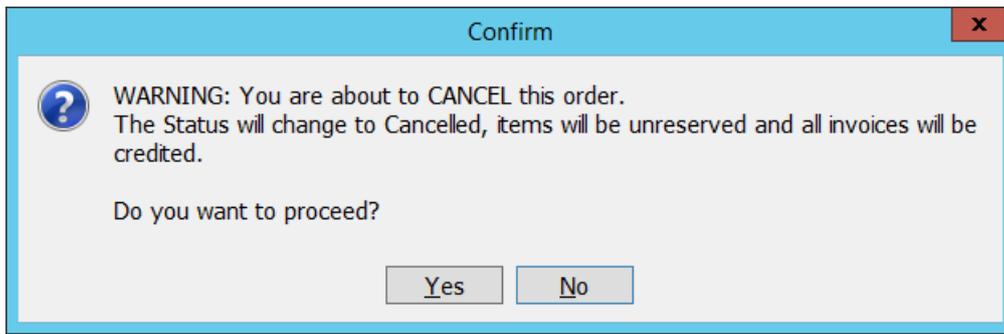
Alternatively you can cancel via right clicking the booking and selecting the *Cancel* option.

The screenshot shows a table of bookings with a context menu open over one of the rows. The table has columns: Out, Date, Time, In, Date. The context menu includes the following options:

- New
- Find
- Open
- View
- Work
- Admin
 - Lock Booking
 - Unlock Booking
 - Cancel Booking Shift+Del
 - Delete Booking
 - Duplicate Booking Alt+F1
 - Combine Bookings
 - Archive This Booking
 - Unarchive Booking
- Financials
- Print
- Print [Fast Report]
- Options
- Log Out

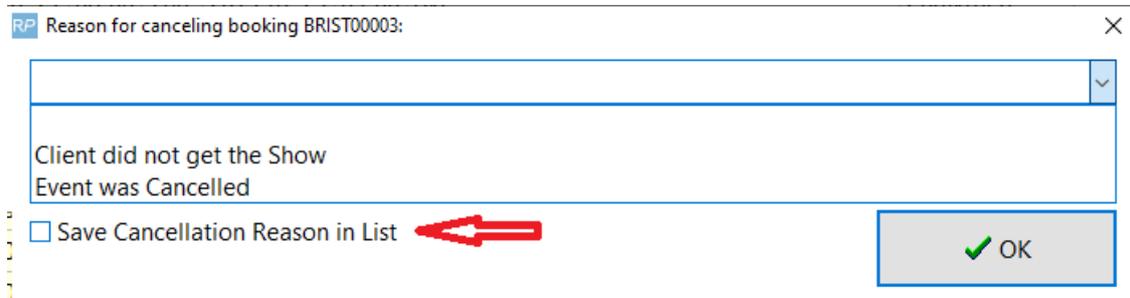
Invoices, Cross Rentals, Transfers, PO's will be processed per users confirmation....

Any record of Out/Returned items will be removed from checkout session information



RentalPoint will prompt the operator to enter a cancellation reason. Once this is completed the system will list the booking as cancelled.

When cancelling a booking, highlight the reason for cancelling the booking OR enter a new reason. Click 'Save Cancellation Reason in List' if you would like to use the reason again without needing to type it in.



Cancelled Booking Reason Report

Pull a report of cancelled bookings and their reason from the RentalPoint Reports Menu