Inventory and Bookings

Last Modified on 19/06/2023 5:41 pm EDT

Equipment Grid Features

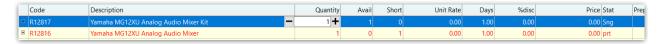


Equipment Grid Colours

Built-in Colours for Line Items

RentalPoint uses 'built in' colours on the Equipment Grid of each booking to communicate some inventory issues/status as follows:

Red: Equipment is not available/short for the time period of the rental



Purple: Light Pencil overlap - i.e. while the product is available, there is a light pencil booking in the system that, if confirmed, will cause a shortage against this product for this time.



Teal over yellow: identifies a part product

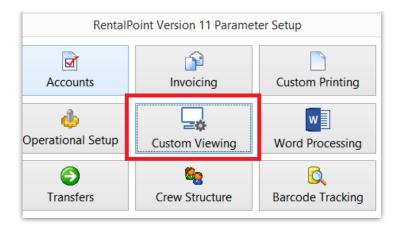


Light Gray: identifies gear in 'enq' status - i.e. an inquiry for pricing is being made against the item BUT it cannot be saved like that, you'll need to delete the item or double click it to change the status to an SNG or PRT item



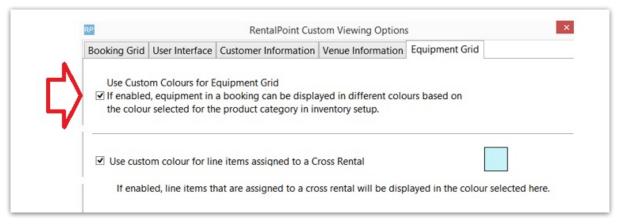
Custom Colours for Line Items

To enable custom colours on the Equipment Grid of a booking, Goto Setup-->Parameters off the main RentalPoint menu, then click 'Custom Viewing'

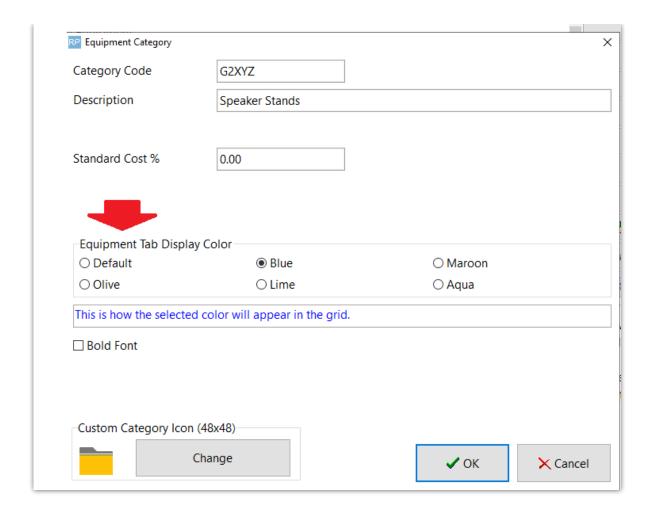


Click the Equipment Grid Tab

 Click 'Use Custom Colours for Equipment Grid' to have equipment display in the colour defined in Inventory Setup

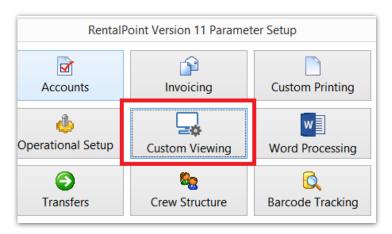


Define equipment grid colours for each category in inventory setup

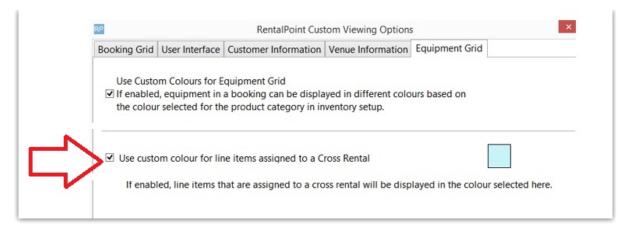


Custom Colours for Assigned Cross Rentals

Goto Setup-->Parameters off the main RentalPoint menu, then click 'Custom Viewing'



 Click 'Use Custom Colour for line items assigned to a Cross Rental', to display assigned cross rentals in a different colour



Below is a sample of how a line item with an assigned cross rental would display on the equipment grid of a booking, based on the colour settings in 'Custom Viewing' Equipment Grid Parameters



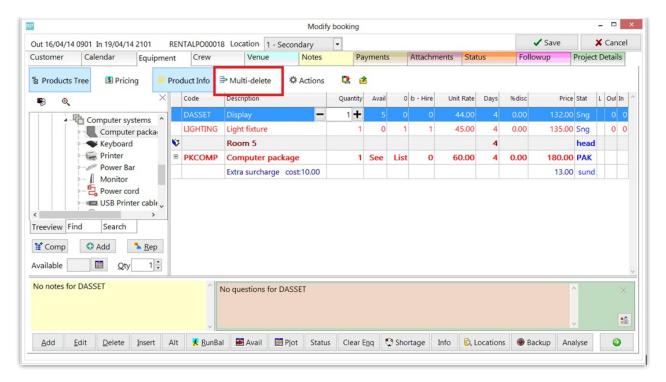
Equipment Grid Client or Warehouse Active/Mute Functionality



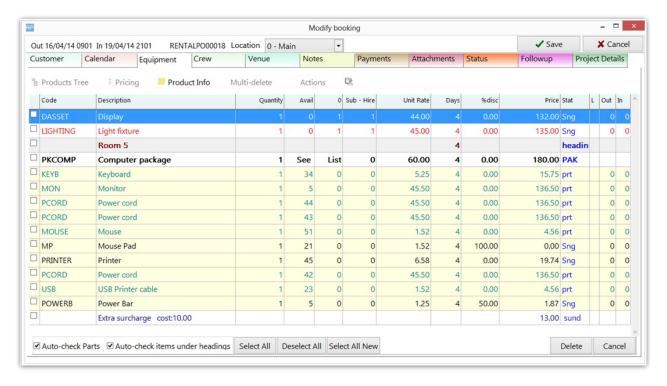
Multi-Delete Equipment Grid Items

Using the multi-delete option multiple lines in the equipment grid of a booking can be selected for deletion.

To switch to multi-delete mode click the 'Multi-delete' button at the top of the equipment tab.

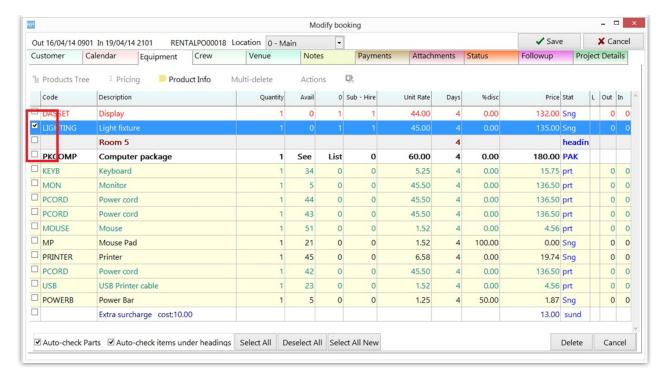


This will hide all windows except the equipment grid. The 'Product Info' button is still available if needed.



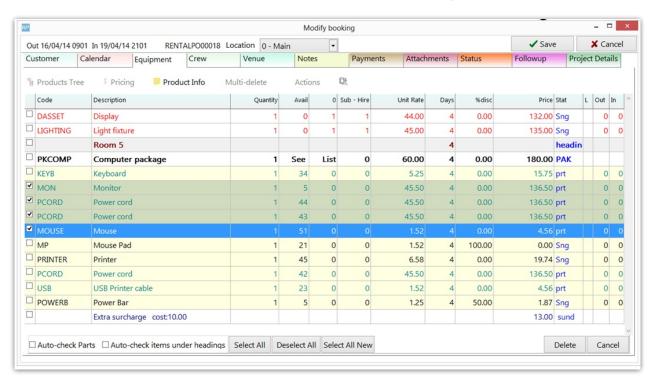
Selecting Lines

Select or de-select any line by clicking the checkbox in the first column.

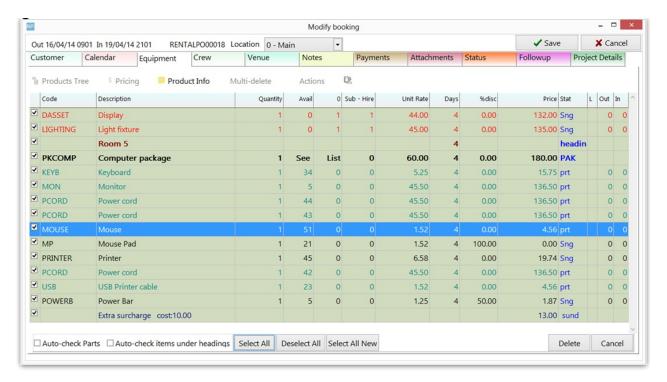


Select a range of lines by clicking a checkbox holding down the shift key and clicking a checkbox above or below the selected line.

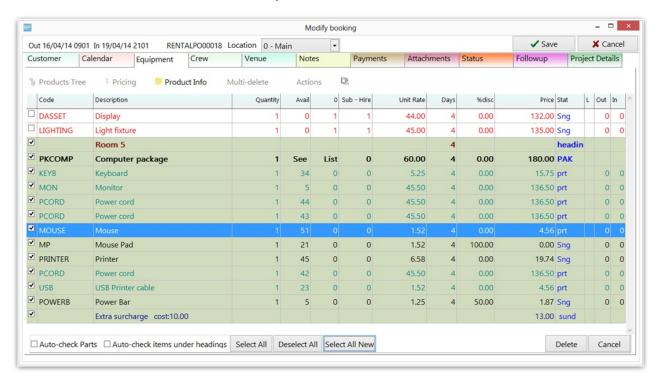
If you want to de-select a range uncheck a line and again hold down the shift key and click a checkbox above or below to clear all the checkboxes within that range.



The 'Select All' and 'Deselect All' buttons will check and uncheck all the equipment in the grid.



The 'Select All New' button will select any new lines added since the last save.

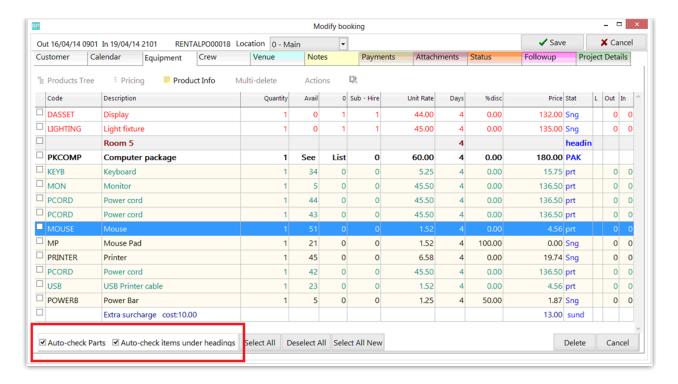


Auto Check Parts

The 'Auto-check Parts' option will cause all the components and accessories of a product/package to be selected if the parent product is selected.

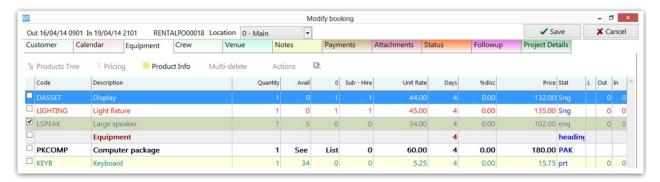
The 'Auto-check items under headings' option will cause all the items below a heading to be selected if the heading is selected.

Note: these options will not apply if range select is being used by holding down the shift key.



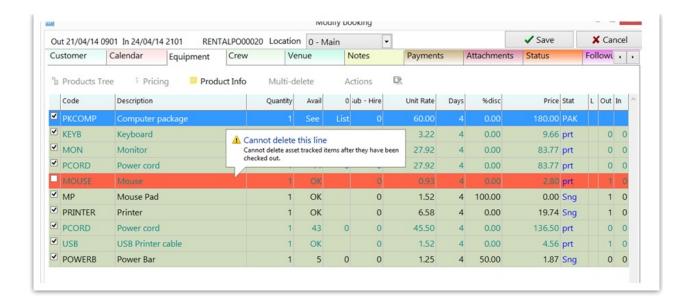
Enquiry status lines

When moving to delete-mode any lines with 'enq' status will be automatically selected. Uncheck any you don't wish to remove.



Invalid Selections

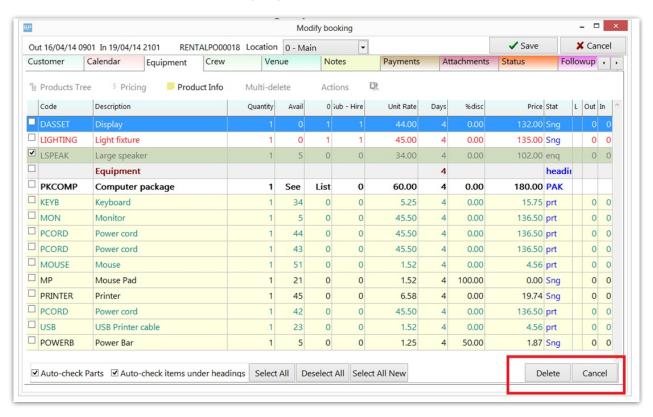
If you attempt to select a line that cannot be deleted it will display in red. Hovering over the line will display more information about why the line can't be deleted.



Deleting the lines

Once all the lines are selected click the 'Delete' button on the bottom right side of the screen to remove the selected lines and exit delete-mode.

To exit delete-mode without removing any lines click the 'Cancel' button.



Equipment Headings and Sundries

For convenience and for empowerment the booking has the added ability to add **Headers** and **Sundry Items** in the Equipment Grid.

You can find this options in the Booking/ Equipment tab.

There are several variations to add a Heading or Sundry in the Equipment Grid:

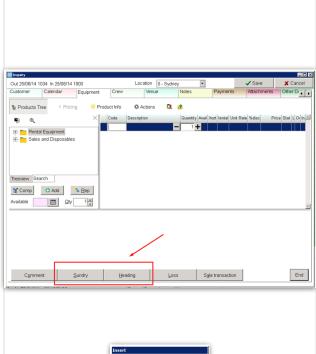
- When you create a new booking and go to the equipment tab you can immediately see this buttons in the Bottom Menu--->
- When you added a few products you can add a Heading or Sundry for some group of assets:
 - Click Add in the Bottom Menu and you can see these buttons such as in the picture ---->
 - Click **Actions** and select **Add** in the Top Menu and you can see these buttons such as in the picture
 - Right-click on the Equipment Grid and select Add and you can see these buttons such as in the picture--->
- You get a similar option if you click Insert button. You can find this button perform the same actions description in previous point.

You can also use hot keys. Just click **"A"** that would go to the Add menu or click **"I"** that would go to the Insert menu -->

Now the details about the **Heading** and its capabilities. When you click **Add** and select **Heading** the blank line appears. You can name it manually or click this button



and then you can select the room name (but room name you can select only If you have been added Venue). It will be applied to the description automatically.



Product

C Sundry

✓ OK X Cancel





Reserve Assets to a Booking



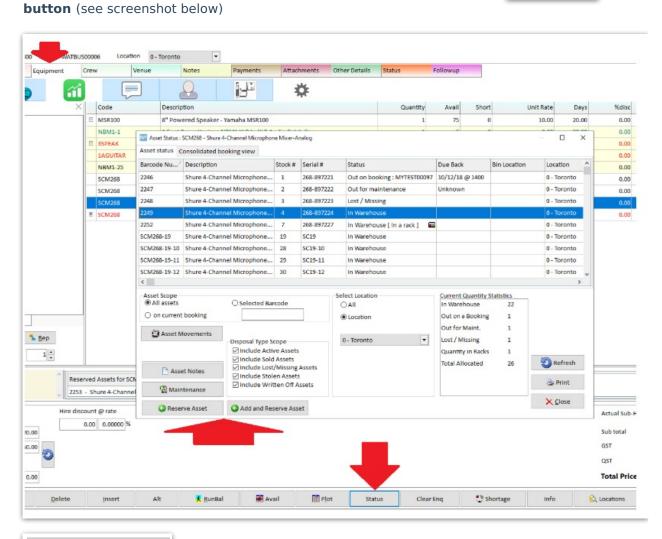
🚺 'Parameters' & 'Operator Privileges' necessary for this functionality are outlined at the end

of this article.

Click on each screenshot for an enlarged view

Open the Asset Status Window from the Equipment Grid using the

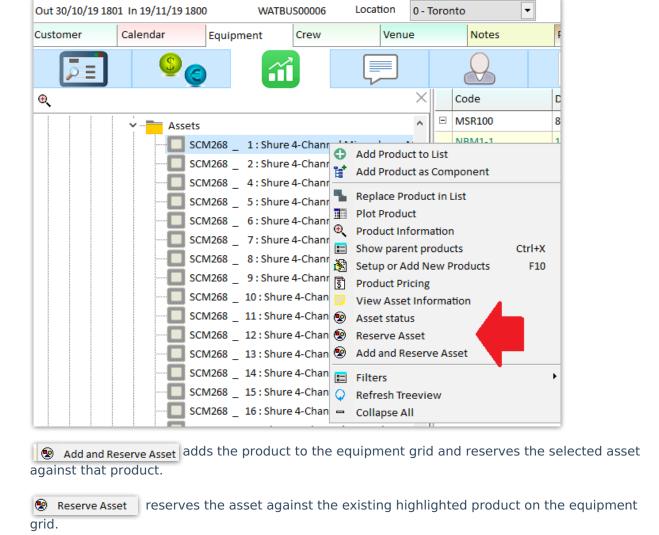
Status



reserves the selected asset against the existing highlighted product on the equipment grid.

adds the product to the equipment grid and reserves the selected asset against that product.

Alternatively you can right click the asset in the Treeview



Once the booking is saved, the asset will be reserved to the booking.

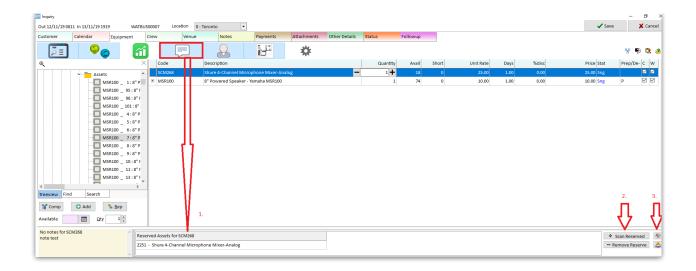
Ongoing List of Reserved Assets.....

• 1. Toggle the info panel for an ongoing list of reserved assets (this will only show once you have reserved your first asset via the right click option above)

Asset status opens the Asset Status window (see screenshot above) where you can also

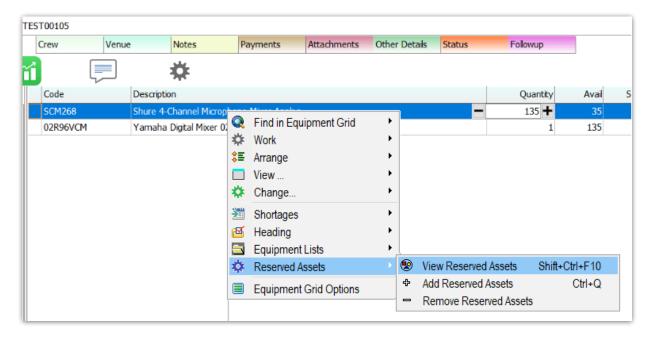
- 2. Use the scan/remove buttons to add/remove reserved assets (this is the quickest way to remove a single asset reservation)
- 3. View all reserved assets for the booking

reserve assets.



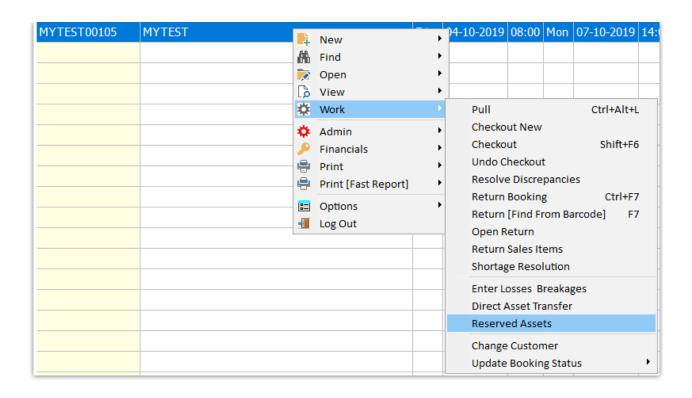
If the notes window is showing instead, click the icon in the right hand corner to return to reserved assets window

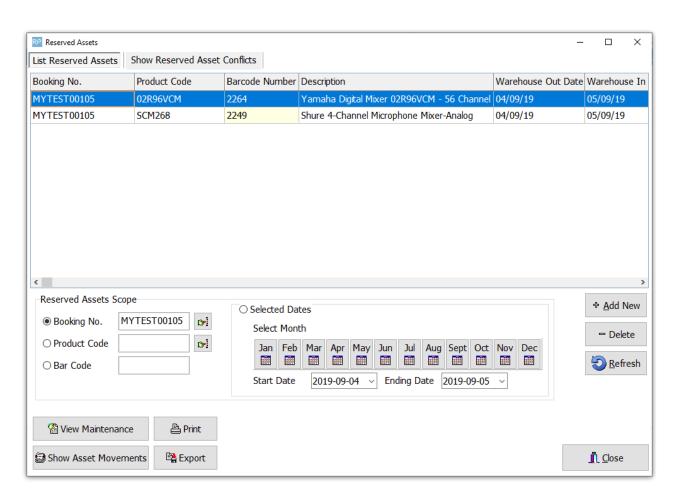
Or from the equipment grid, Right click-->Reserved Assets -->View Reserved Assets to see all reserved assets

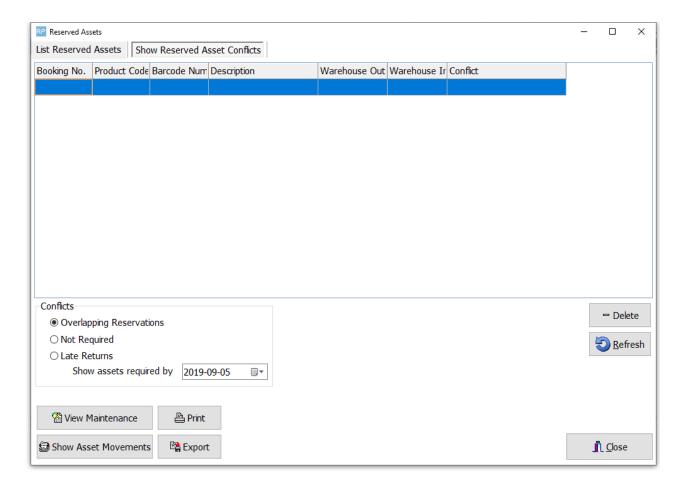


A search window will display all reserved assets for the booking.

Pull up the same window from the booking grid via Right click option.

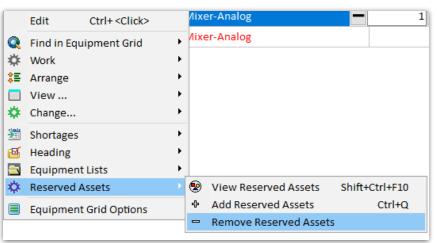






Remove Reserved Assets

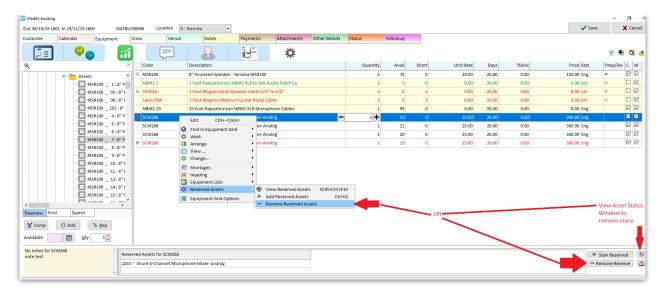
1. Right click option



- 2. OR from the 'Reserved Asset' section at the bottom of the equipment grid (see Fig 1 below)

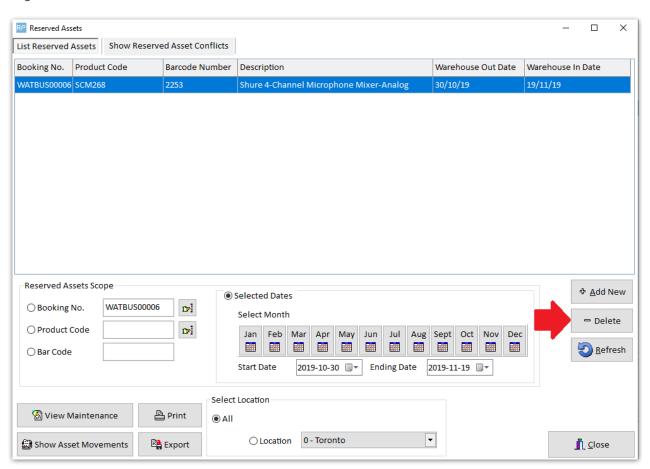
 Click Remove Reserve which will remove the reserved asset from the highlighted product

 OR
- 3. Open the Asset Status window and delete the reservation (see Fig 2 below)



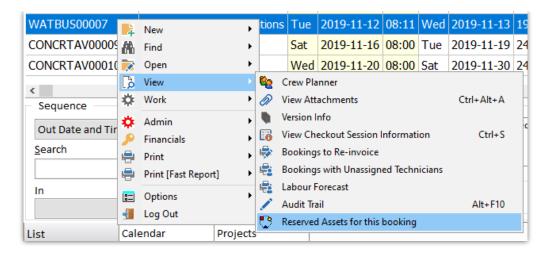
The search window will display all assets on the booking. Delete will remove assets.

Fig 2.

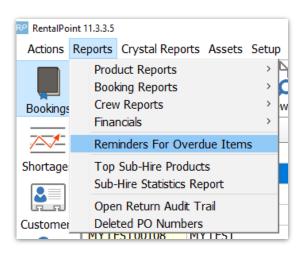


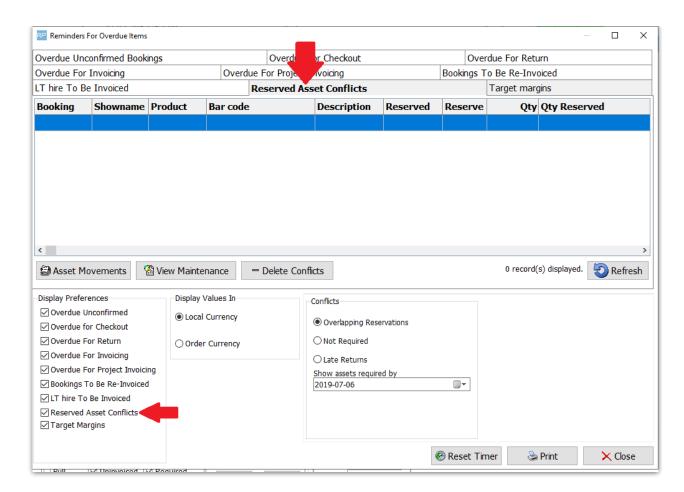
Maintain Reserved Assets from Outside the Booking

Right click on the booking to view reserved assets. You can also delete asset reservations from here.



View Reserved Asset Conflicts from the Reminder Window



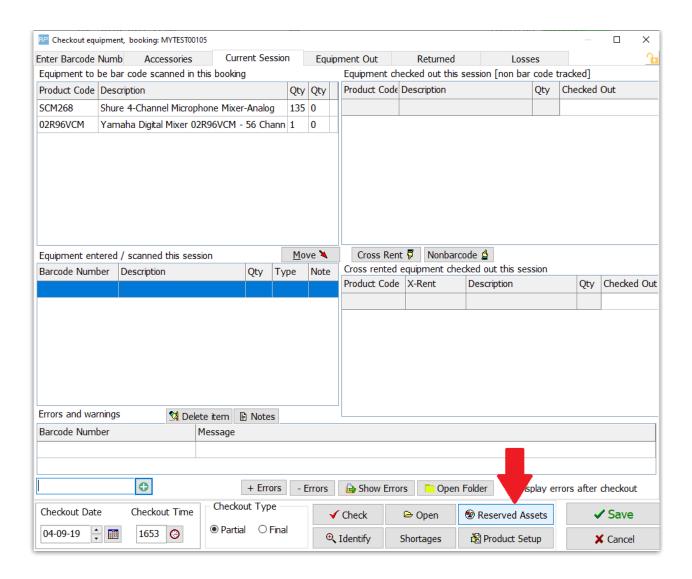


Booking HardCopy / PickList

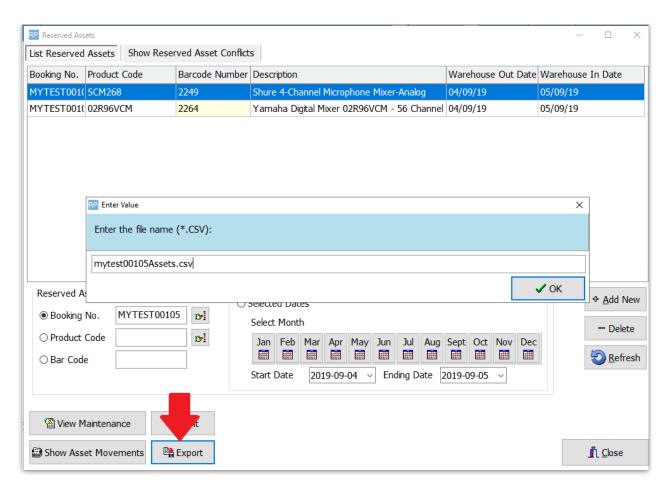
| | 19 at 15:15 Booking Hardcopy alley Ltd Feltham | Page No : 1 Booking No : WATBUS00008 |
|--|--|---|
| | Items Ordered by Booking Order | |
| Togation : 0 - | Toronto Show Name : MyS | Them |
| Delivery To | Invoice To | |
| Delivery 10 | | aterloo Business Solutions |
| | | 10 Nipissing Rd |
| | | |
| | Mi | ilton Ontario Canada L9T 4Z9 |
| Phone 1 | Fax Phone 1 | 905 6939457 Fax |
| | | |
| Venue Contact | : Phone 1: | |
| Crder No. | Ware/h Out Date/Day/Time Vi | nna Vall 1 days Fayment Eccking Taken & Updated Ey 30 day acc RP-RP |
| | 13/11/19 Wednesday 0811 Ar | nna Vall 1 days |
| Crder Late | hare/h ln Late/Lay/Time Via | Payment Ecoking Taken & Updated By |
| 13/11/19 | 14/11/19 Thursday 1919 Anna Vall | 30 day acc RP-RP |
| Eccking Contact | Customer Contact | Ercject |
| | | |
| • | : | |
| Audic Equipment MSR100 8" Powe ***** D.A.T. fro NFM1-1 1 F 3SPFAK 3 F 1AGUITAR ***** D.A.T. fro Extras - 13/11/2 PMP-11 Pmplifi CTS600 CTS600 *** SHORTAG NBM1-1 1 Foot | red Speaker - Yamaha MSR100 m WATBUS00007 MyShow ***** oot RapcoHorizon NEM1 XLR to XLR Audio Pat oot Mogami Gold Speaker Cable 1/4" to 1/4" 1 Foot Mogami Platinum Guitar Pedal Cable 1 WATBUS00007 MyShow ***** 019 0811 to 14/11/2019 1919 er ES *** RapcoHorizon NEM1 XLR to XLR Audio Patch Ca | 2 s:: |
| | Mogami Platinum Guitar Pedal Cable | |
| AMP-11 Amplifi CTS600 CTS600 | er | 1 |
| *** RESEFVE Code Descrip AMP-11 Amplifi CTS600 | tion Bin | n Location Barcode Number Serial Number AMF1103 CTS003 |
| | | |
| | eight 458.85 KG | |
| Total V | olume 68.31 Cubic metres | |
| | Made Up By | <i></i> |

Checkout Reserved Assets

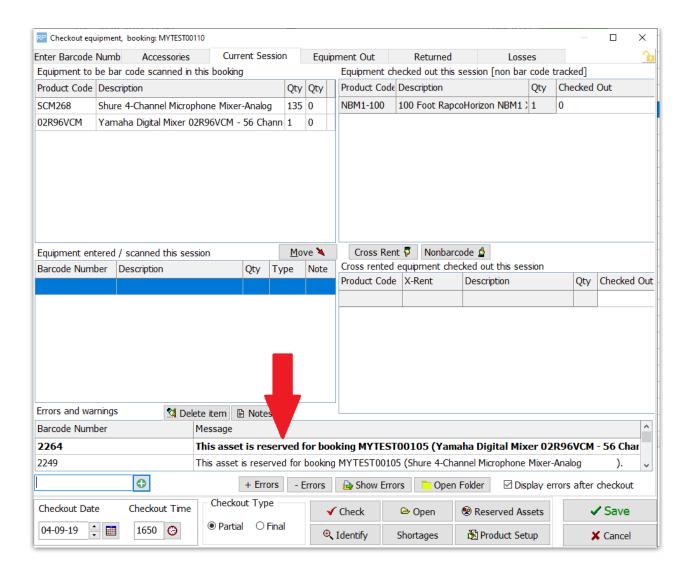
Search for reserved assets against a booking from the checkout window



Export your list of reserved assets to csv if needed



If you try to check out a reserved asset against a different booking, an error will be displayed in the checkout window

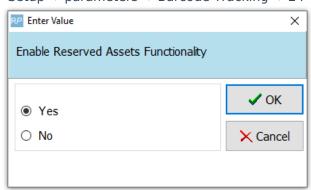


Parameters

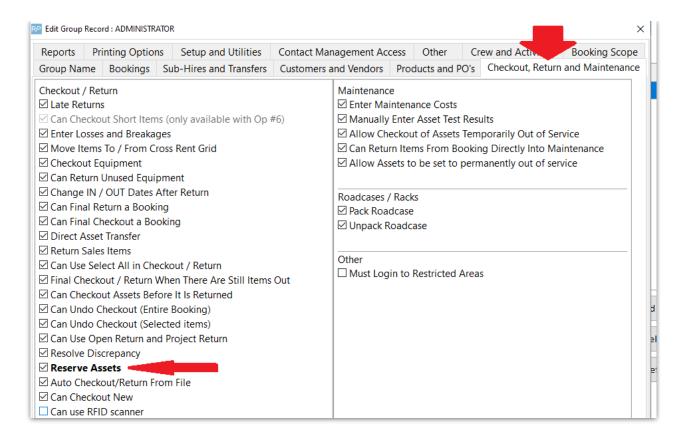
Barcode Tracking #24 - Reserve Assets for Specific Bookings must be enabled.

Note, duplicated bookings do not bring the asset reservation to the new booking.

Setup-->parameters-->Barcode Tracking-->24



Operator Privileges



Manage Reservations



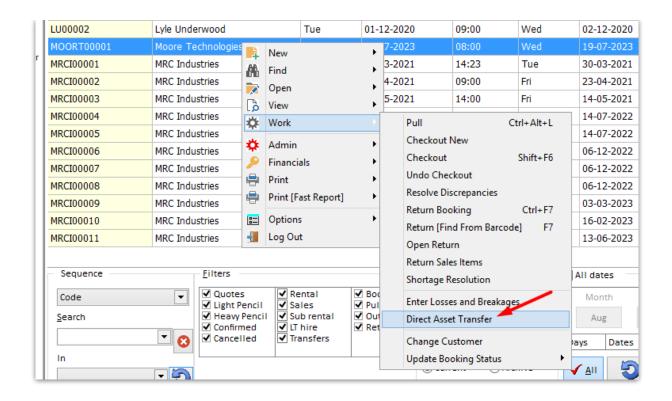
Location Transfers



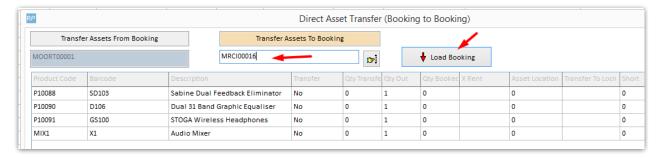
Direct Asset Transfer

Use Direct Asset Transfer to skip the warehouse return and send checked out gear directly to another booking.

First, right click on the <u>checked out</u> booking, then select the Direct Asset Transfer option from the work menu

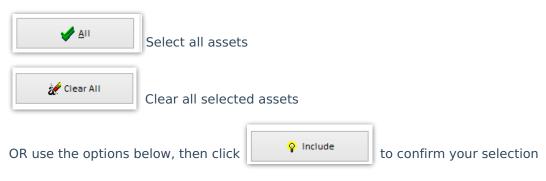






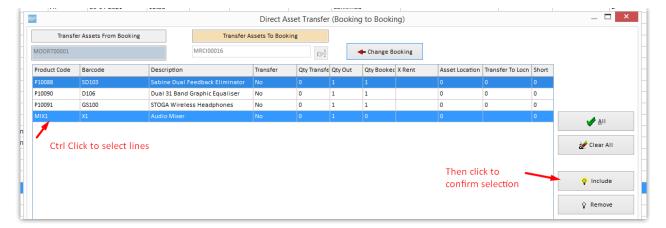
Load Booking

Once the booking is loaded, select items to include as follows:



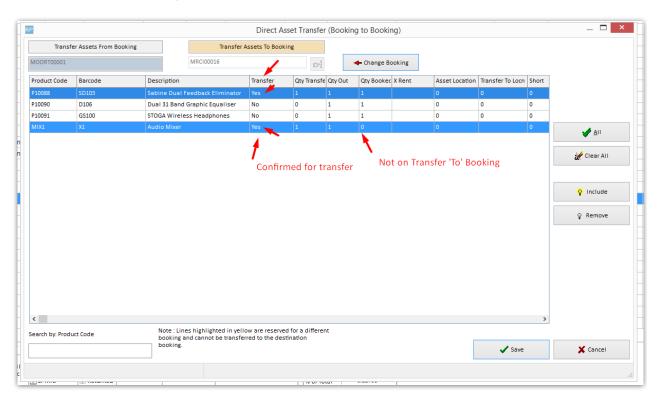
Ctrl Click Add the current asset to the selection list

Click & drag mouse To select a range of assets



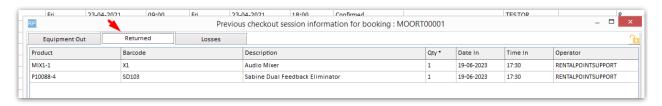
Notice:

- The Transfer column now shows Yes next to the confirmed transfer items
- Items that do not exist on the transfer 'To' booking show a Qty Booked of zero (note these
 items will be added to the booking per parameter settings adding gear at checkout see
 <u>Check Out a Booking</u> for more information)

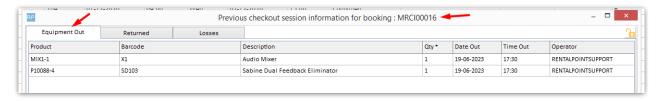


Click SAVE to process the transfer

Saved items are returned to the original booking



And checked out to the Transfer 'To' booking



Miscellaneous Costs



Quick Turnaround Items

Quick turnaround can cover shortages by quickly prepping equipment for early release when it comes back into the warehouse or directly transferring it to another booking onsite. Setting a line as quick turnaround does not affect regular availability but will instead display the Quick Turnaround on Running Balance and Plot Sheet.

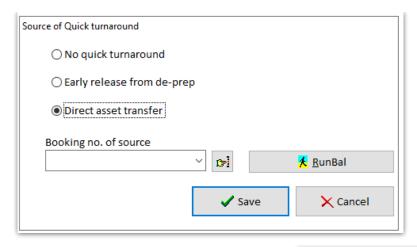
Using Quick Turnaround

When enabled a Quick T/A column will appear in the booking equipment grid. See more information on Quick Turnaround parameters at the end of this article.

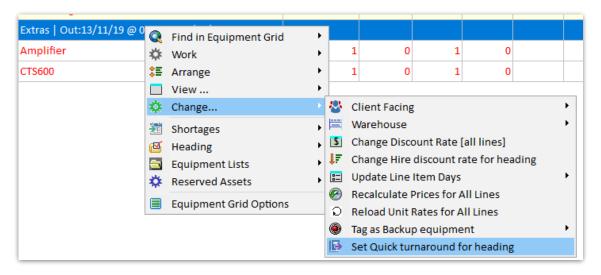
To assign quick turnaround to the line, enter a quantity in the 'Quick/TA' field and tab or click on the button to launch the source window.



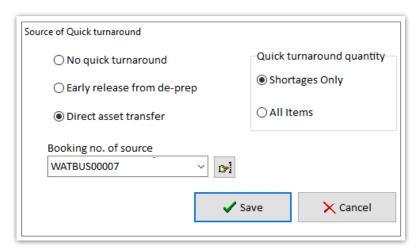
Fill the shortage from Direct Asset Transfer or Early release from de-prep, use the booking search/running balance options to find a suitable booking.



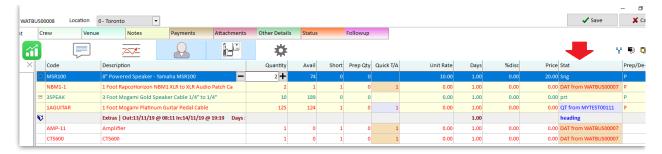
To cover all items under a heading, use the Set Quick turnaround for heading option available on the right click menu



Cover all heading items or limit the coverage to shortages only



Shortages resolved with Quick Turnaround are identified in the 'Stat' column of the equipment grid



On subsequent opening of the booking, shortages resolved with Quick Turnaround options will be displayed.

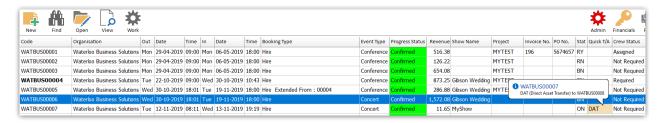


Identifying Quick Turnaround Items (on the source booking)

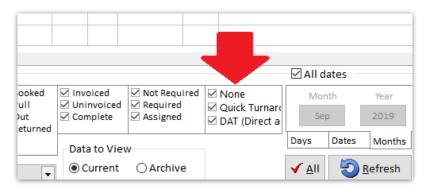
Booking Grid

The Quick/TA column on the booking grid identifies bookings that have Quick Turnaround items on them needed for another order

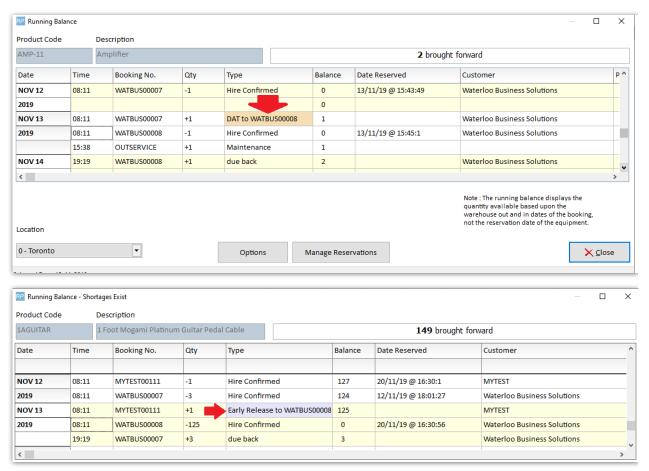
See Booking Grid Documentation (page 4) to move the location of the Quick T/A column if needed



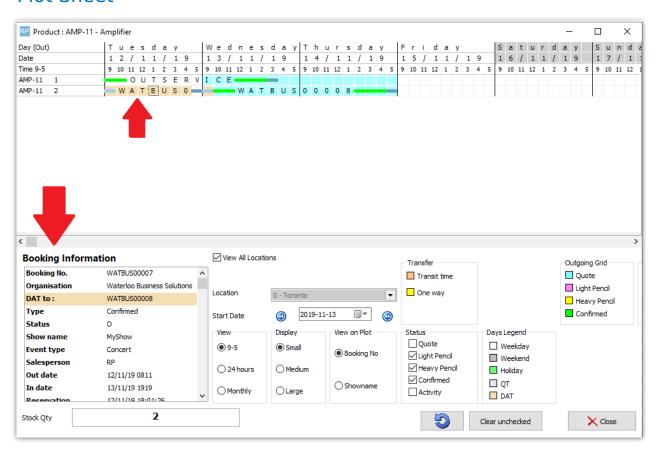
The Booking Grid scope filters allow for isolated display of Quick T/A Bookings



Running Balance



Plot Sheet



On the PickList / Booking Hardcopy

Shows the booking that the Direct Asset Transfer/Quick Turnaround is coming from

Standard Picklist

```
Code
        Description of Goods Ordered
                                                           Oty Ready Loaded Return Short
Audic Equipment
MSR100 8" Powered Speaker - Yamaha MSR100
***** D.A.T. from WATBUS00007 MyShow *****
   NEM1-1 1 Foot RapcoHorizon NEM1 XLR to XLR Audio Pat
                                                              2
   3SPEAK 3 Foot Mogami Gold Speaker Cable 1/4" to 1/4"
                                                            10
***** Quick Turnaround from MYTEST00111 Gibson Wedding *****
       1AGUITAR 1 Foot Mogami Platinum Guitar Pedal Cable
***** D.A.T. from WATBUS00007 MyShow *****
Extras - 13/11/2019 0811 to 14/11/2019 1919
AMP-11
       Amplifier
                                                              1
CTS600
        CTS600
```

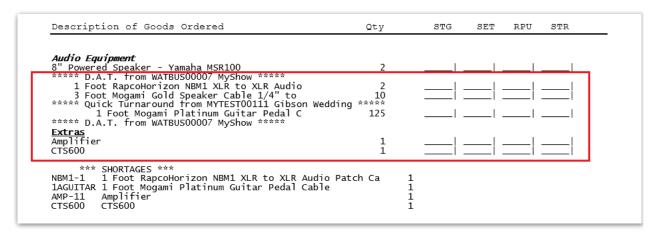
Custom PickList

Use &ODATC& insert field to show Direct Asset Transfer/Quick Turnaround on

Template Placement



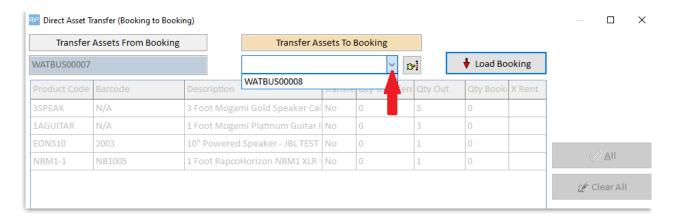
Output



Collection Docket

Direct Asset Transfer (DAT)

Select the scheduled bookings for DAT from the drop down of the 'transfer to' booking instead of using the search.



Quick Turnaround Parameters

Set Operational Parameter 88 'Enable Preparation Time' to YES first

Enable quick turnaround on the 'Specialty' tab of operational parameter #6.



