

Tracking a Booking

Last Modified on 07/04/2023 9:55 am EDT

Check Out a Booking



Checking out Short Items

When the user has the 'Can Checkout Short items' privilege

Customers and Vendors	Products and PO's	Checkout, Return and Maintenance
Checkout / Return <input checked="" type="checkbox"/> Late Returns <input checked="" type="checkbox"/> Can Checkout Short Items <input checked="" type="checkbox"/> Enter Losses and Breakages		Maintenance <input checked="" type="checkbox"/> Enter Maintenance Costs <input checked="" type="checkbox"/> Manually Enter Asset Test R <input checked="" type="checkbox"/> Allow Checkout of Assets T

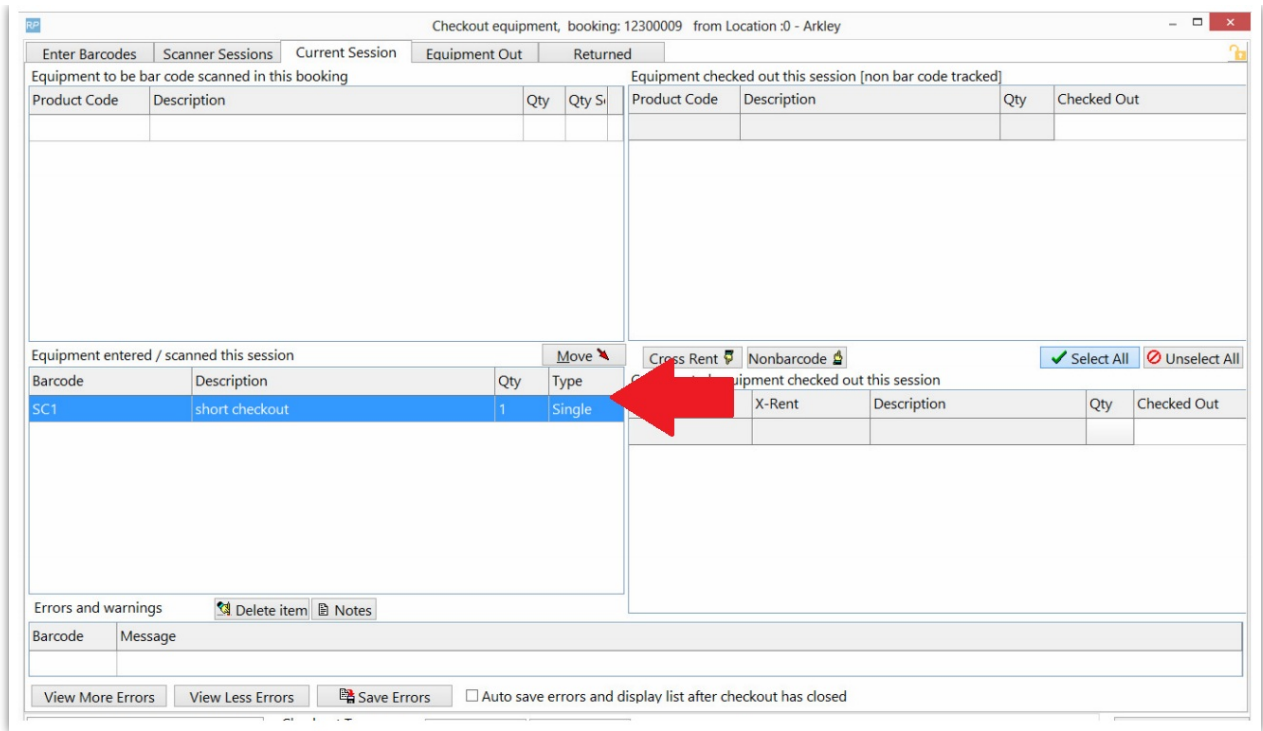
If a barcoded item is short and appears in the cross rental grid in the checkout window.....

Scenario 1

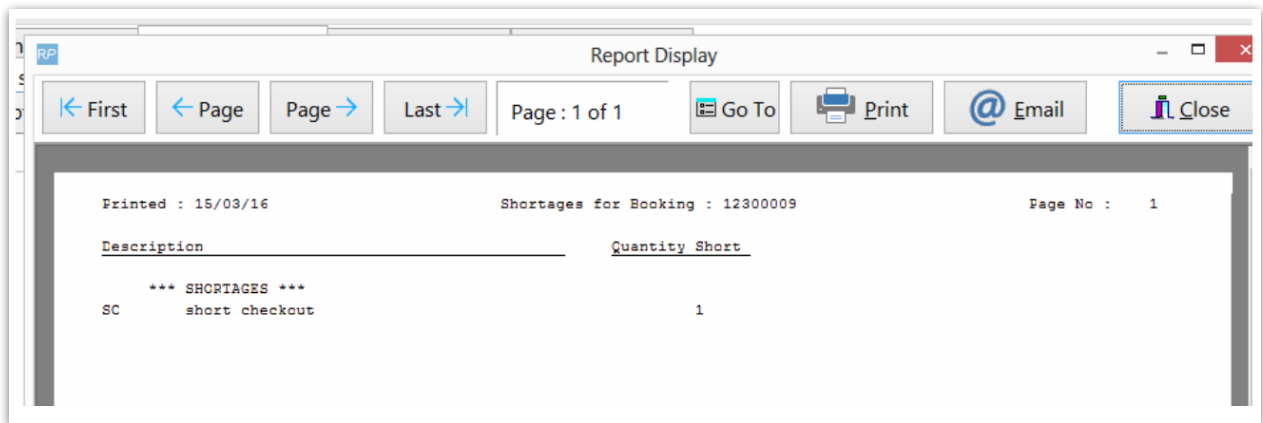
If a barcode is scanned for that item anyway.

Enter Barcodes	Scanner Sessions	Current Session	Equipment Out	Returned										
Equipment to be bar code scanned in this booking			Equipment checked out this session [non bar code tracked]											
Product Code	Description	Qty	Qty S	Checked Out										
Equipment entered / scanned this session			Move	<input type="checkbox"/> Cross Rent <input type="checkbox"/> Nonbarcode <input checked="" type="checkbox"/> Select All <input type="checkbox"/> Unselect All										
Barcode	Description	Qty	Type	<table border="1"> <thead> <tr> <th>Product Code</th> <th>X-Rent</th> <th>Description</th> <th>Qty</th> <th>Checked Out</th> </tr> </thead> <tbody> <tr> <td>SC</td> <td>SHORT</td> <td>short checkout</td> <td>1</td> <td>0</td> </tr> </tbody> </table>	Product Code	X-Rent	Description	Qty	Checked Out	SC	SHORT	short checkout	1	0
Product Code	X-Rent	Description	Qty	Checked Out										
SC	SHORT	short checkout	1	0										
Errors and warnings <input type="button" value="Delete item"/> <input type="button" value="Notes"/>														
Barcode	Message													
<input type="button" value="View More Errors"/> <input type="button" value="View Less Errors"/> <input type="button" value="Save Errors"/> <input type="checkbox"/> Auto save errors and display list after checkout has closed														

The short item will be removed from the cross rental grid and it will allow the checkout

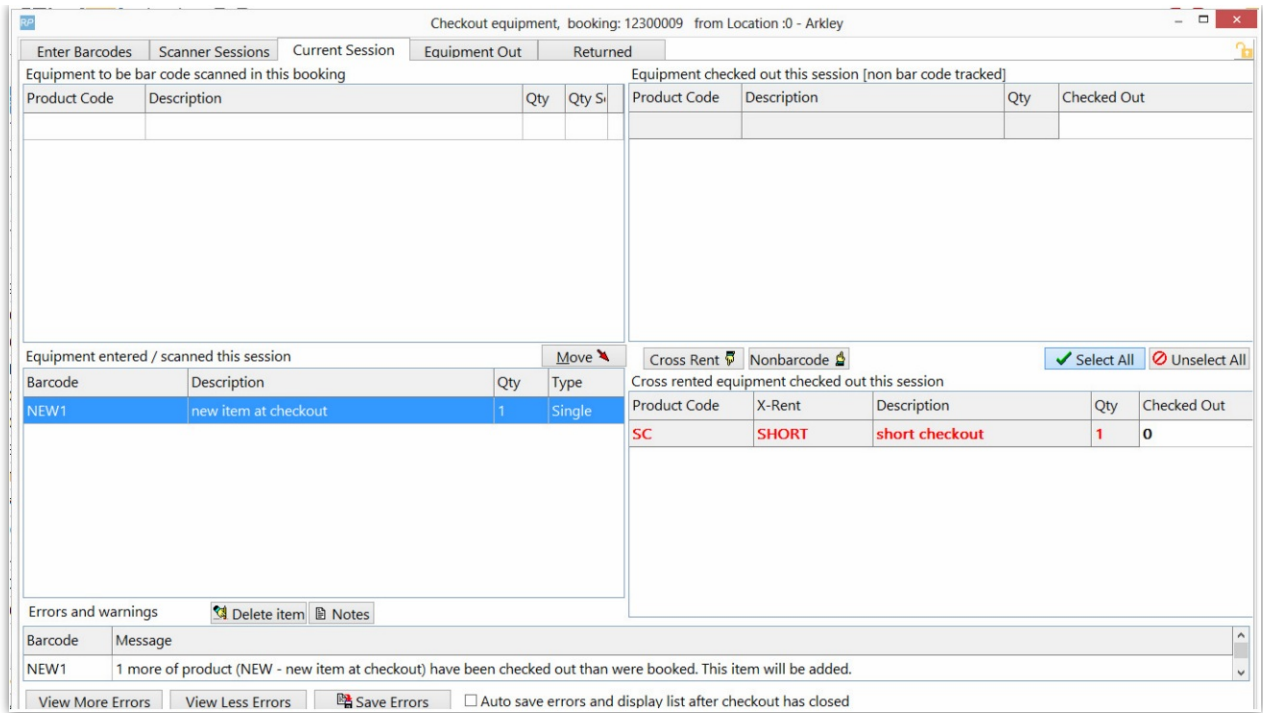


The item will still appear on the shortage report

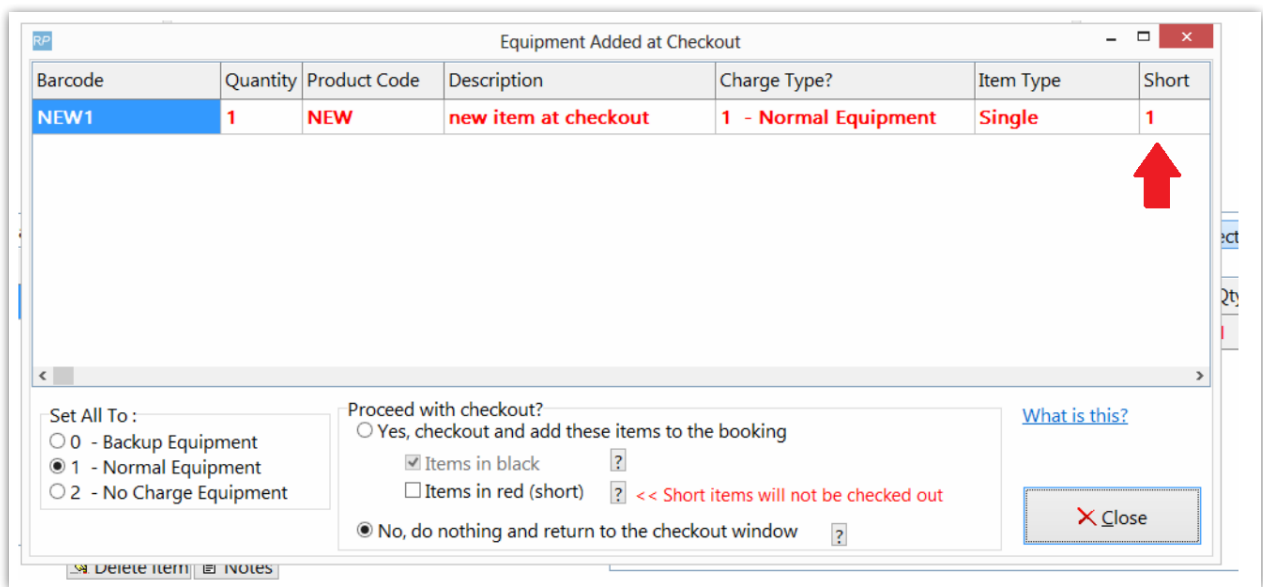


Scenario 2

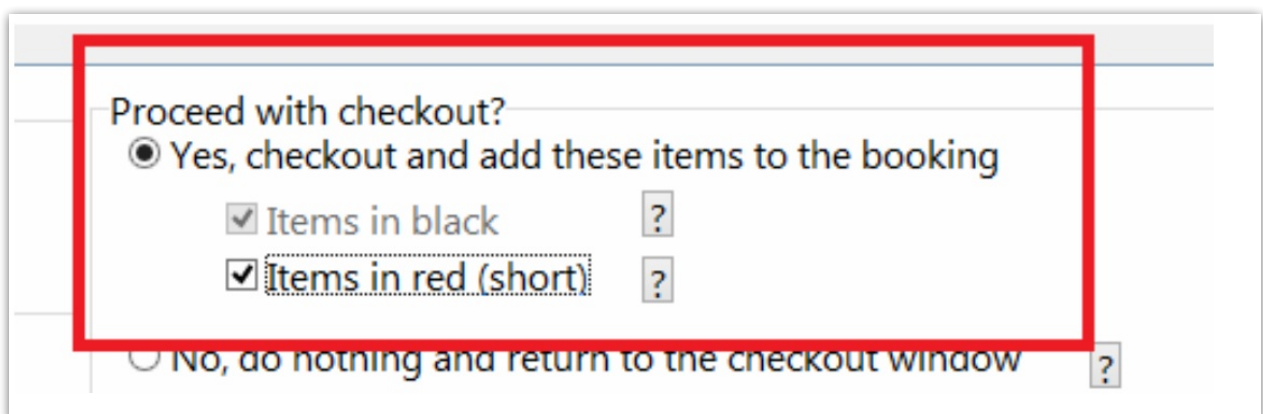
If a **new item** is scanned instead of the booked item



And the new item is also short, it will show up in the added at checkout window



At this point the user should check the 'Items in red (short)' in addition to 'Yes, checkout and add these items to the booking'



Checkout will proceed and the error list will not pop-up afterwards unless the 'auto save and display errors' checkbox is selected.

Auto save errors and display list after checkout has closed

Check Open

Items can either be matched with a shipped item or just deleted by changing the action drop-down on the line.

Booked But Not Shipped (Items In The Booking)

Code	Description	Ordered	Shipped	Quantity	Action
SC	short checko	1	0	1	Delete ▾

Shipped But Not Booked (Items Added At Checkout)

Tag	Code	Description	Quantity	Charge/bac
No	NEW	new item at checko	1	No Charge

Split Line Find Next Change All Lines To: Match

Tag Un Tag Change All Lines To:

Resolved Equipment
- Equipment Ordered

Notes
Match equipment on the left with equipment on the right. To select multiple items, Tag multiple lines. Equipment already shipped cannot be deleted. You can either Match or Delete equipment in the 'Booked But Not Shipped' grid. For booked items you want to match to shipped items, select the 'Match' option. For items that you want to delete from the booking, select the 'Delete' option.
Items shipped but not booked can have a Charge / Backup / No Charge applied to them.

Also there is a parameter that automatically opens the resolve discrepancies window on final checkout as needed

Checkout Non-Barcoded Items

Using a barcode for each item ensures you can track that exact items whereabouts. There will be some items like cables or cones that you don't need to know the whereabouts for each individual item.

For scanning purposes though, you may still want to give your non barcode tracked items a 'non tracked barcode'. This will make it easier to scan items in bulk when checking out.

In Inventory Setup, give your non barcoded item a 'Non tracked Barcode', then use that code to

scan the non barcoded items as follows

The screenshot shows the 'Edit Product Record' window for a '3 Foot Mogami Gold Speaker Cable 1/4" to 1/4"'. The 'Product Information' tab is active, showing fields for Product Code (3SPEAK), Description, Model No. (3SPEAK), Colour, Qty Owned (744.00), Country of Origin, Revenue Code, Default Accessory Discount, and Non-tracked Barcode (11209). The 'Product Options' tab is also visible, with checkboxes for 'For Individual Rental / Sale', 'Barcode Track', 'Don't allow product to be discounted', 'Product is a Generic Item', 'Expand When Added to a Booking', and 'Auto Checkout this Item'. The 'Configuration' section has 'Single item' selected, and the 'Shipping' section has 'Is shipped on it's own' selected. The 'Non-tracked Barcode' field is highlighted with a red box.

Scan the full quantity of the non barcode tracked item that you are shipping on this booking. So if 1 is booked and 4 are extras, then you would scan 5 below.

The screenshot shows the 'Checkout equipment' window for booking MYTEST00001 from Location 0 - Toronto. The 'Enter Barcodes' tab is active, and the 'Scan One or More Barcode(s) :' area is empty. A 'Scan Quantity' dialog box is open, showing the quantity '5' entered. The dialog box has a 'Next' button and an 'OK' button. A red arrow points to the 'Scan Quantity' button (labeled 1.), another red arrow points to the 'OK' button (labeled 3.), and a red arrow points to the quantity '5' (labeled 2.).

Enter your non tracked barcode

You can continue to scan other items or just hit checkout barcodes

Notice Rentalpoint will count one of the items towards what was booked and the others as 'added at checkout'

Equipment to be bar code scanned in this booking				Equipment checked out this session [non bar code tracked]			
Product Code	Description	Qty	Qty :	Product Code	Description	Qty	Checked Out
MSR100	8" Powered Speaker - Yamaha MSR100	1	0	6SPEAK	6 Foot Mogami Gold Speaker Cabl	1	0
				NBM1-1	1 Foot RapcoHorizon NBM1 XLR to 1	1	0

Equipment entered / scanned this session				Cross rented equipment checked out this session				
Barcode	Description	Qty	Type	Product Code	X-Rent	Description	Qty	Checked Out
3SPEAK	3 Foot Mogami Gold Speaker Cable 1/4"	4	Single					
3SPEAK	3 Foot Mogami Gold Speaker Cable 1/4"	1	Single					

Barcode	Message
11209	4 more of product (3SPEAK - 3 Foot Mogami Gold Speaker Cable 1/4" to 1/4") have been checked out than were booked. This item will be added.

Checking out Roadcase Items

Available in RentalPoint Version 12

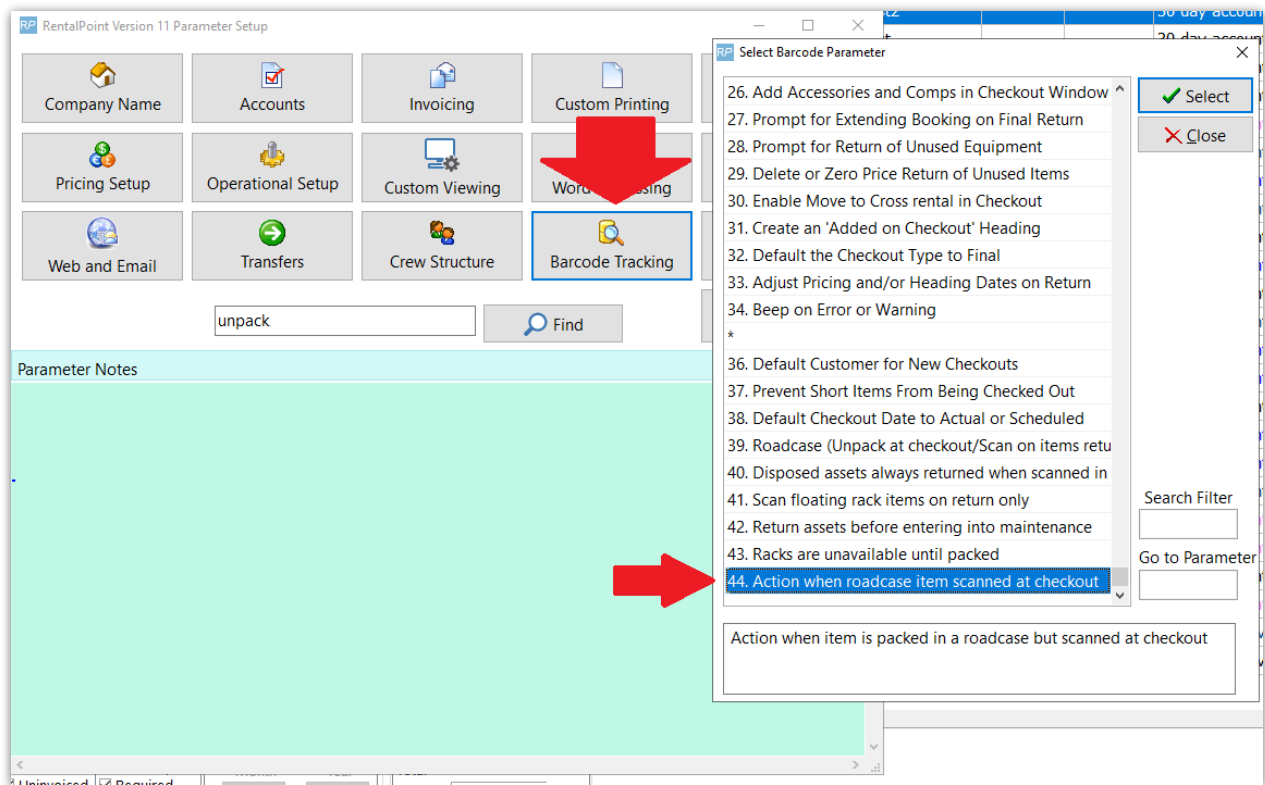
Predetermine how RentalPoint should handle items that are packed in a roadcase, but scanned

out as a single item during checked session!

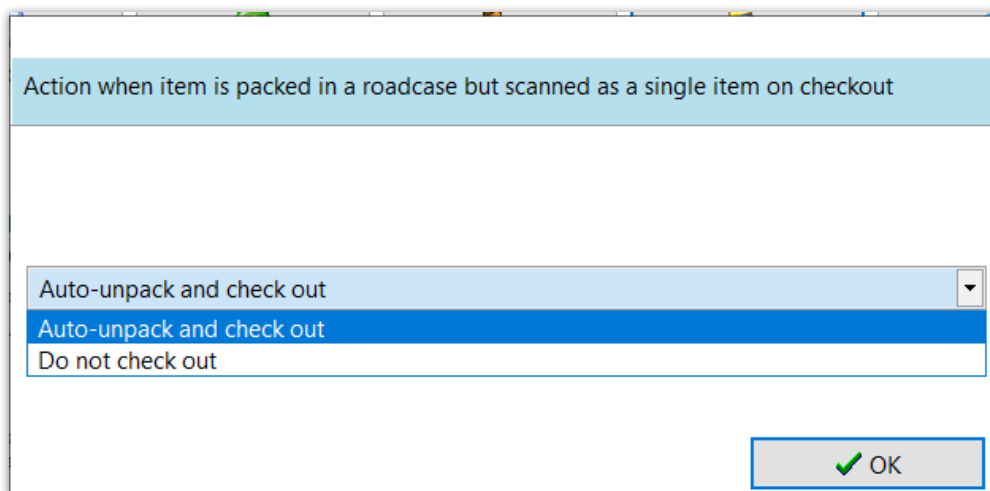
Exceptions:

- When RFID is in use, the action is set to 'Do not check out' to ensure that scans of single items by the reader don't unpack the roadcase
- This parameter does not affect racks

Goto Setup-->Parameters-->Barcode Tracking-->44



- Auto-unpack and check out: when an item that is packed in a roadcase is scanned as a single item, it is unpacked from the roadcase and checked out
- Do not check out: Shows an error message and prevents the roadcase item from being checked out



Undo a Checkout



Resolve Discrepancies (Pre v12)

Note: If your video shows a black screen but audio still plays

1. *Goto `chrome://flags/#disable-accelerated-video-decode`*
2. *Disable Hardware-accelerated video decode and relaunch Chrome*


Your browser does not support HTML5 video.



Resolve Discrepancies (Pre v12)



Resolve Discrepancies Version 12

 Rentalpoint offers the ability to resolve discrepancies on bookings, ie. when gear that has been scanned out/checked out and shipped for a booking, is different to what was originally booked. This article covers resolving discrepancies only, [for details on how to check out a booking click this link](#)

For Parameters needed for this functionality, see 'Parameters in Use' section at the end of this article.

Identifying Checked out Items on a Booking

The screenshot below illustrates the use of 'Equipment Added at Checkout' heading and shows how to identify items on a booking that have NOT been checked out.



Code	Description	Quantity	Avail	Short	Unit Rate	Days	%disc	Price	Stat	Out	In	C	W
MSR100	8" Powered Speaker - Yamaha MSR100	2	WMute		10.00	1.00	0.00	20.00	Sng	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NBM1-1	1 Foot RapcoHorizon NBM1 XLR to XLR Audio Patch Ca	2	OK		0.00	1.00	0.00	0.00	prt	2	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3SPEAK	3 Foot Mogami Gold Speaker Cable 1/4" to 1/4"	10	OK		0.00	1.00	0.00	0.00	prt	10	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1AGUITAR	1 Foot Mogami Platinum Guitar Pedal Cable	5	OK		0.00	1.00	0.00	0.00	prt	5	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Equipment added on checkout - Date:06/27/19 @ 1507 Out										1.00			
EONS10	10" Powered Speaker - JBL TEST	1	OK		45.00	1.00	100.00	0.00	Sng	1	0	<input type="checkbox"/>	<input type="checkbox"/>
EONS15X	15" Powered Speaker - JBL PRODESC	1	OK		38.00	1.00	100.00	0.00	Sng	1	0	<input type="checkbox"/>	<input type="checkbox"/>


Items added at checkout

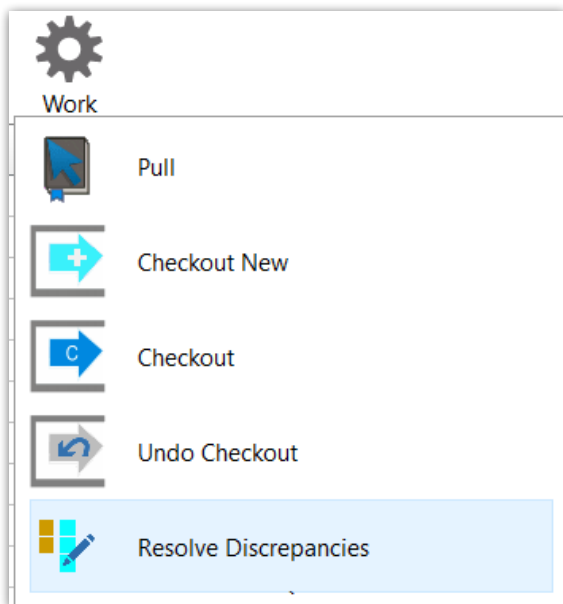
NOT checked out

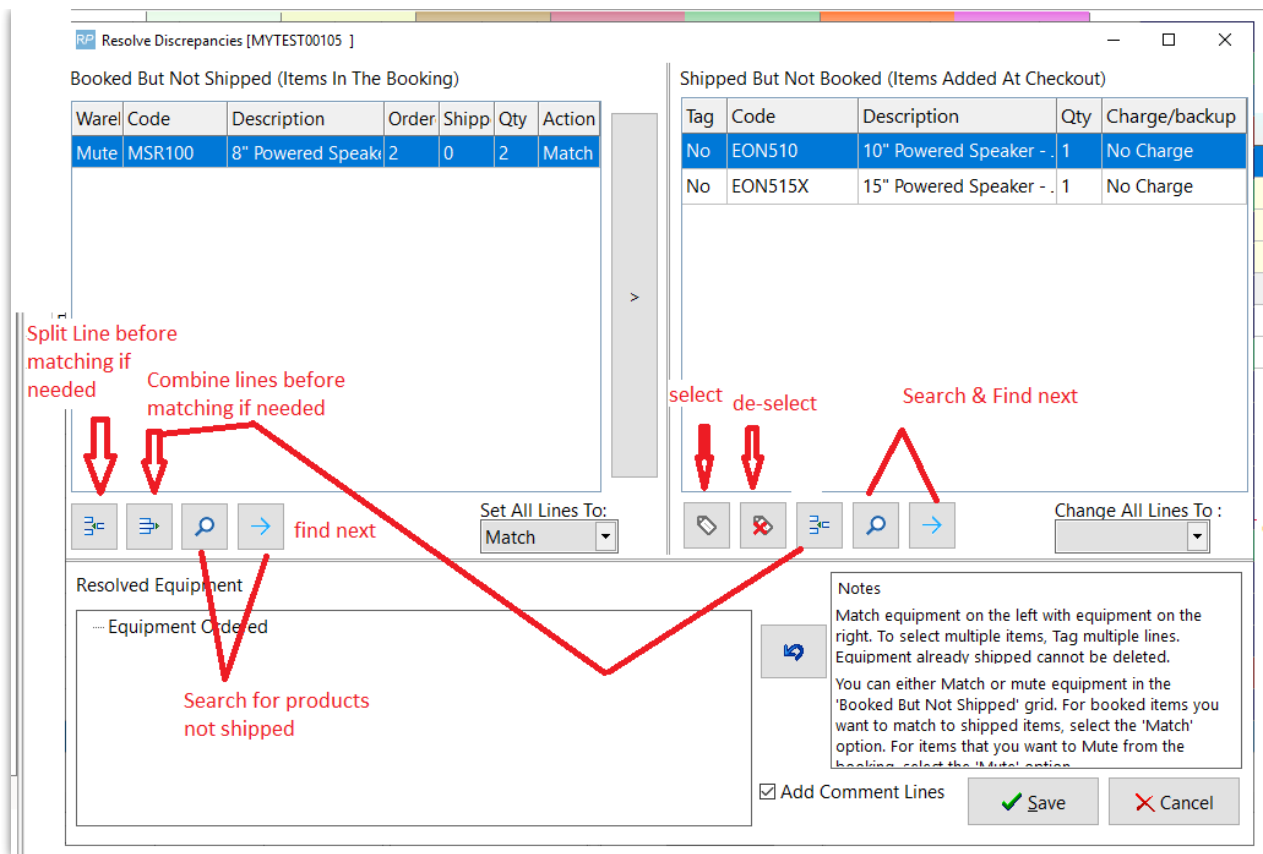
Items Checked out

Resolving the Discrepancy

If Resolve Discrepancy was not automatically launched after final checkout (see parameters in use) then right click on the booking-->work-->resolve discrepancies, or highlight the booking and clickmenu option below

 The Resolve Discrepancy menu option will only show IF there are discrepancies to resolve.

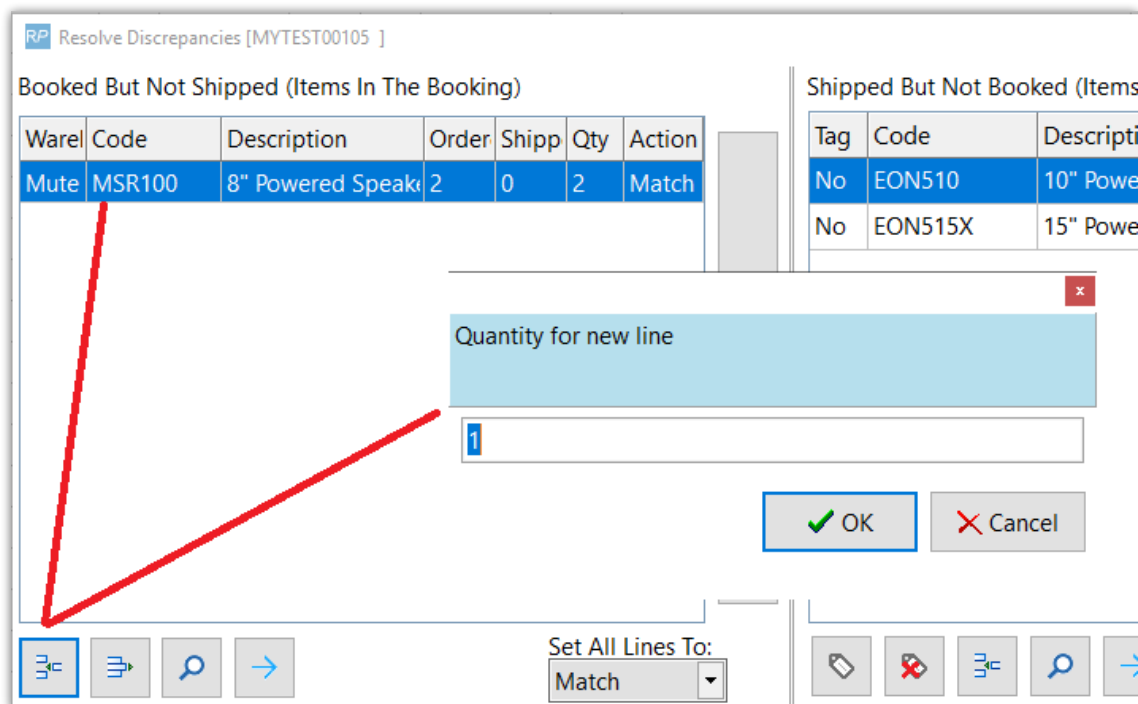




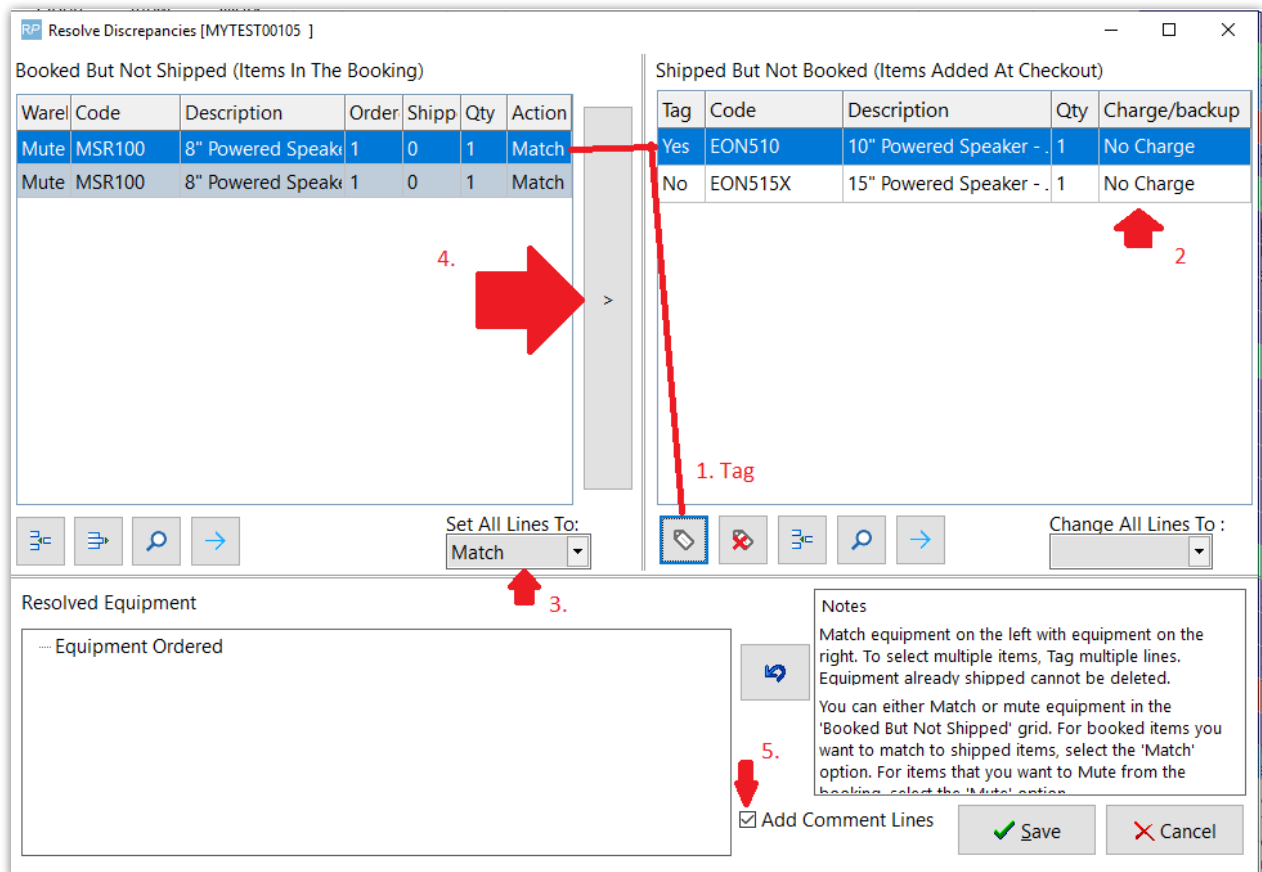
Resolve Discrepancy Example

Gear is displayed in the Resolve Discrepancy window as below:

1. Split the Booked but not shipped line so as to match with separate shipped but not booked items



1. Highlight the unshipped item(s) and TAG the shipped items that should be resolved together.
2. There is a 'down arrow' available beside the 'no charge' option to charge extra or charge as backup equipment
3. Choose to MATCH or DELETE Booked but not shipped with Shipped but not booked items.
4. Click the Arrow to RESOLVE
5. If 'Add Comment Lines' is checked, Rentalpoint will automatically add a comment for the resolution into the equipment grid of the order.



Resolved Gear is re-located to the 'Resolved Equipment' window

Resolve Discrepancies [MYTEST00105]

Booked But Not Shipped (Items In The Booking)

Wareh	Code	Description	Order	Shipp	Qty	Action

Shipped But Not Booked (Items Added At Checkout)

Tag	Code	Description	Qty	Charge/backup

Set All Lines To: Match

Change All Lines To:

Resolved Equipment

- Equipment Ordered
 - MSR100 - 8" Powered Speaker - Yamaha MSR100 [1,0,1]
 - Was replaced by
 - EON510 - 10" Powered Speaker - JBL TEST [1]
 - MSR100 - 8" Powered Speaker - Yamaha MSR100 [1,0,1]
 - Was replaced by
 - EON515X - 15" Powered Speaker - JBL PRODESC [1]

Notes

Match equipment on the left with equipment on the right. To select multiple items, Tag multiple lines. Equipment already shipped cannot be deleted.


You can either Match or mute equipment in the 'Booked But Not Shipped' grid. For booked items you want to match to shipped items, select the 'Match' option. For items that you want to Mute from the booking, select the 'Mute' option.

Add Comment Lines

MYTEST00105 Region 0 - ONE Location 0 - Toronto

Equipment Crew Notes Payments Attachments Other Details Status Follow up

Code	Description	Quantity	Avail	Short	Unit Rate	Days	%disc	Price	Stat	Out	In	C	W
MSR100	8" Powered Speaker - Yamaha MSR100	1	WMute		10.00	1.00	0.00	10.00	Sng	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MSR100	8" Powered Speaker - Yamaha MSR100	1	WMute		10.00	1.00	0.00	10.00	Sng	0	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EON510	10" Powered Speaker - JBL TEST	1	OK		45.00	1.00	100.00	0.00	Sng	1	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EON515X	15" Powered Speaker - JBL PRODESC	1	OK		38.00	1.00	100.00	0.00	Sng	1	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	MSR100, 1 X EON515X was shipped.											<input type="checkbox"/>	<input checked="" type="checkbox"/>
	1 X MSR100:8" Powered Speaker - Yamaha MSR100 were ordered but 0 X											<input type="checkbox"/>	<input checked="" type="checkbox"/>
	MSR100, 1 X EON510 was shipped.											<input type="checkbox"/>	<input checked="" type="checkbox"/>
NBM1-1	1 Foot RapcoHorizon NBM1 XLR to XLR Audio Patch Ca	2	OK		0.00	1.00	0.00	0.00	prt	2	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3SPEAK	3 Foot Mogami Gold Speaker Cable 1/4" to 1/4"	10	OK		0.00	1.00	0.00	0.00	prt	10	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	1 X MSR100:8" Powered Speaker - Yamaha MSR100 were ordered but 0 X											<input type="checkbox"/>	<input checked="" type="checkbox"/>
1AGUITAR	1 Foot Mogami Platinum Guitar Pedal Cable	5	OK		0.00	1.00	0.00	0.00	prt	5	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>

 Resolved Gear in booking

Parameters in use

Rentalpoint is parameter driven; functionality described in this document is dependent on the following parameters:

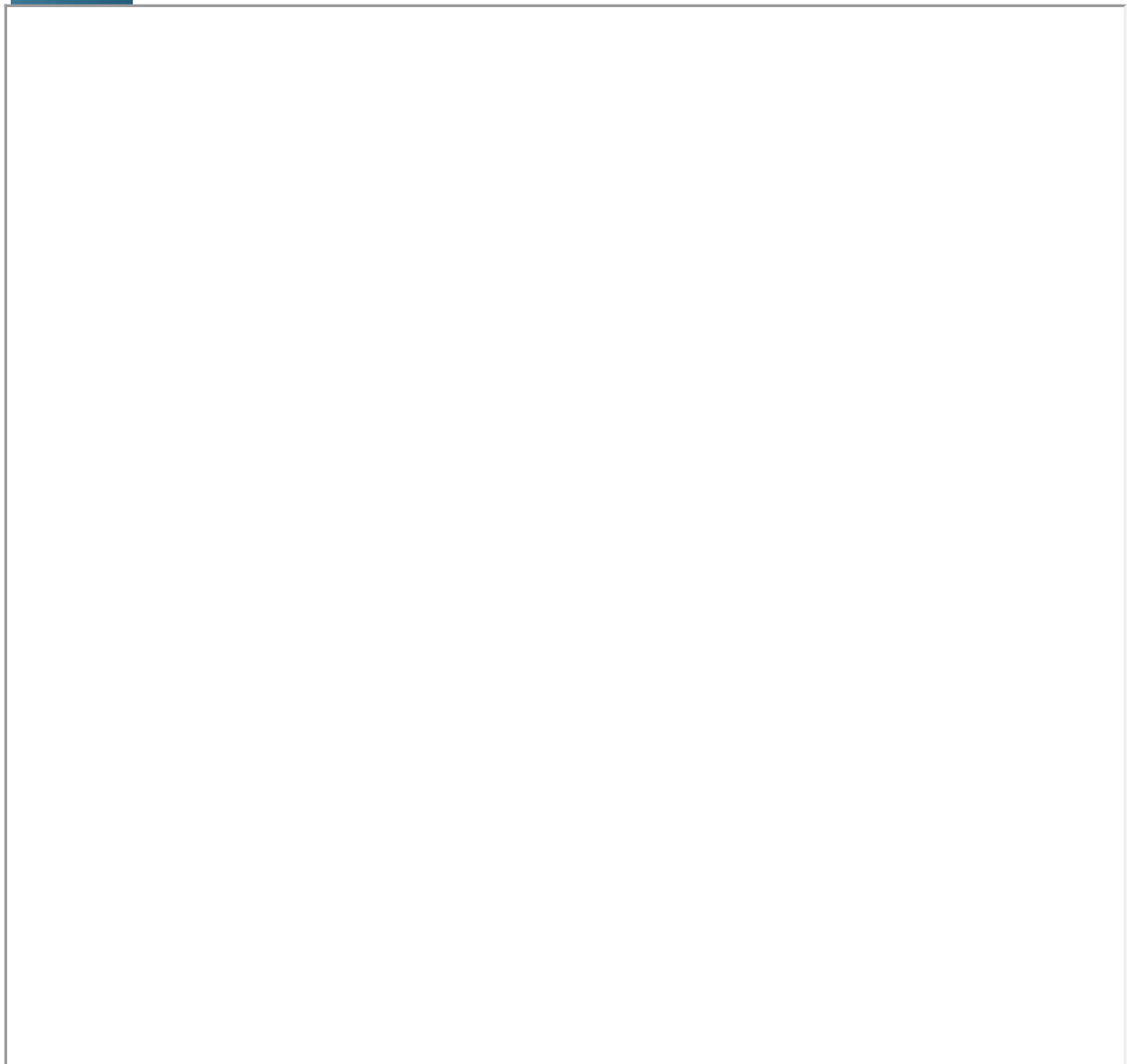
- **Barcode Parameter #22 'Resolve Discrepancies on Final Checkout'** - Setting this parameter will automatically launch the Resolve Discrepancy Feature once a Final Checkout is processed on the booking.
- **Barcode Parameter #23 'Resolve Discrepancy Default Action'** - The resolve

discrepancy window gives the user two options. The first option gives the user ability to match items that were booked but not shipped with items that were added at checkout.

The second option allows the user to delete items from the booking that were booked but not shipped out on the order.

- **Barcode Parameter #31 'Create an Added at Checkout Heading'** – Setting this parameter will ensure that all items added at checkout appear on the order under their own heading and therefore are easier to identify.

Lock Booking for Scanning/Checkout

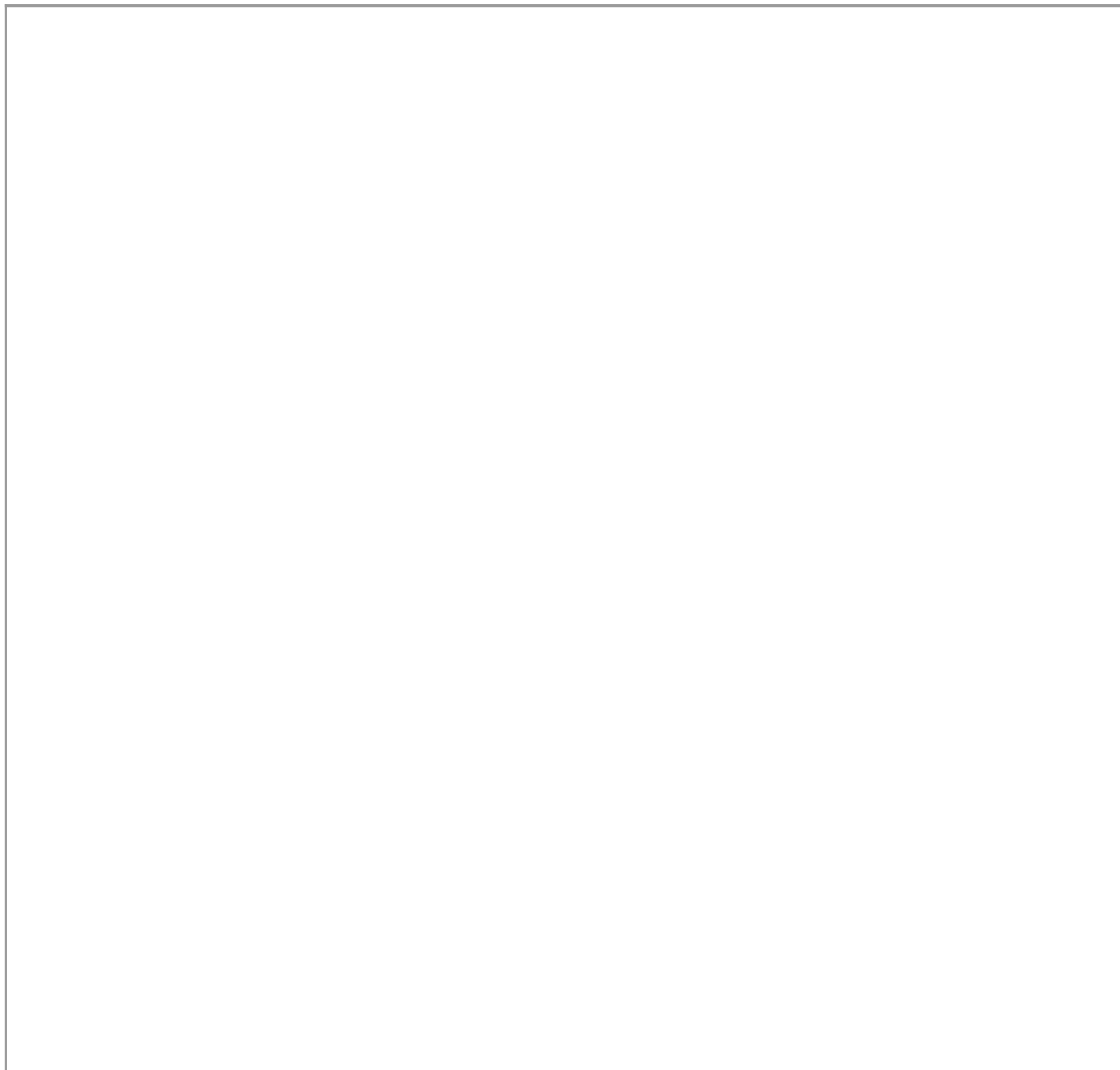


Return Checked out Items (including losses and breakages)



Return Projects





Workflows



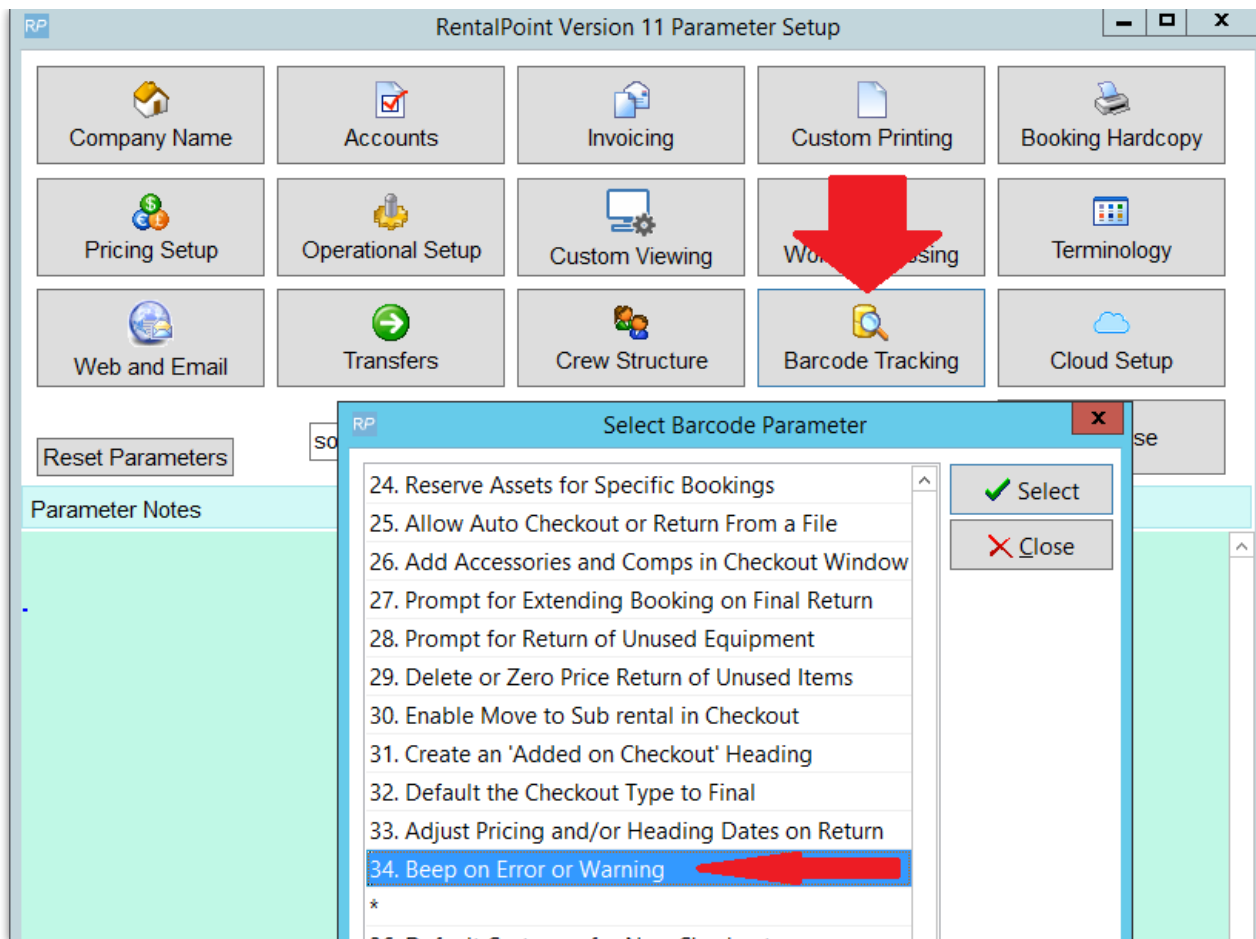


Return Asset to Maintenance



Error or Warning Sounds on Checkout or Return

Set Barcode parameter #34 to enable notification sounds - used when errors or warnings occur while scanning barcodes in the checkout and return windows.



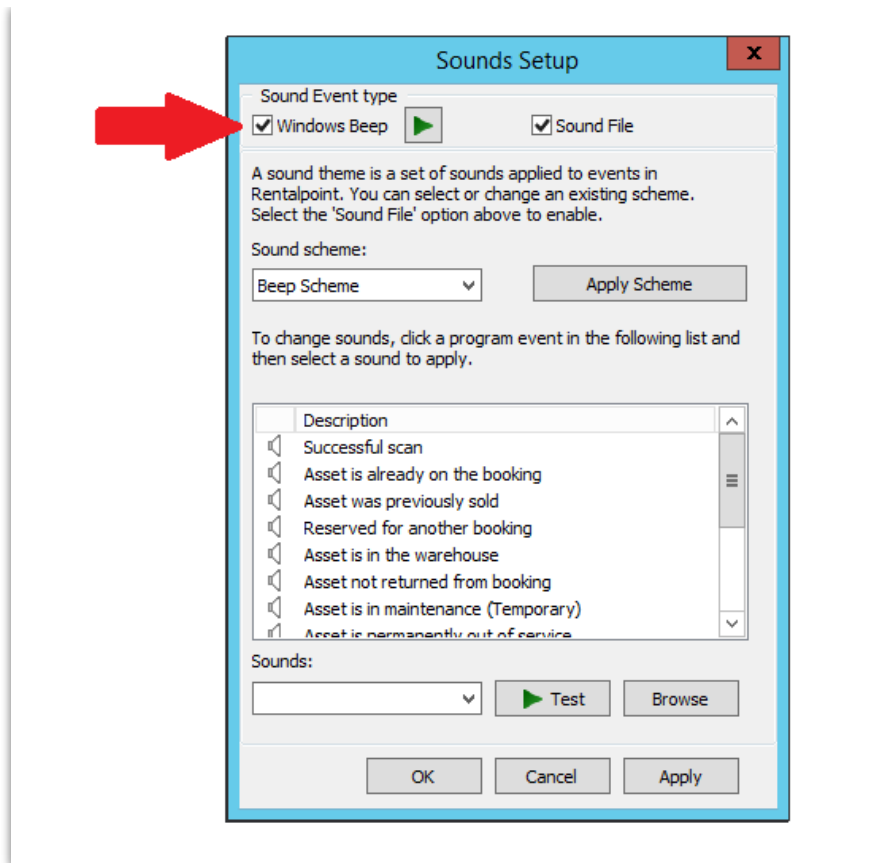
There are two different types of sounds available. Both sounds can be enabled if needed, but most of the time only one or the other should be chosen, they are:

1. The built in 'windows beep'
2. Playing a sound file

Windows Beep

1. Enable 'Windows beep' simply by checking the 'windows beep' checkbox, per the screenshot below.

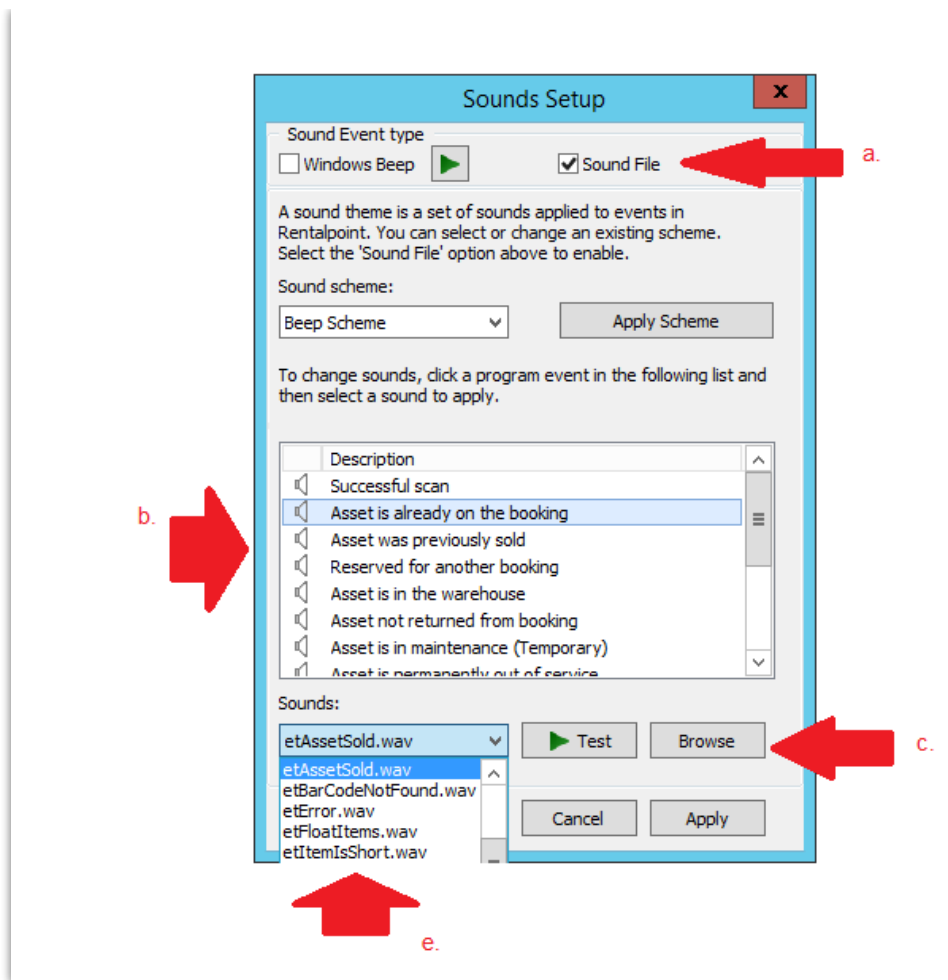
The **Beep Scheme** default (used in conjunction with 'windows beep' setting), applies two different sounds to events; one for errors and one for warnings.




Use of Sound Files

2. Enabling the **sound file** option allows either the default sounds or custom **.wav** files to be used.

- a - Click the sound file check box to enable use of sound files
- b - Click on the event you want to test/change the sound for
- c - To install a **custom .wav file** click the browse button near the bottom of the screen and search for it's file location. The file will be moved to the common data folder and can then be chosen for any of the sound events (or skip this option to work with the list of RentalPoint sounds provided)
- d - Click Test to hear the sound that will play when this event occurs in RentalPoint
- e - Sounds can be adjusted for each event type in the list by clicking on an item in the list, and selecting a different sound from the drop down list.



 Sound files are stored in your RentalPoint 'data/sounds' folder

Auto Resolve on Checkout

Auto-resolve option for alternatives, allows an additional item scanned at check-out to automatically replace an unshipped item. [<more information on alternatives>](#)

Set Up

Items must be set up to auto resolve in Inventory Setup.

- Ensure the possible replacement product is listed as an alternative in Inventory Setup [<more information on alternatives>](#)
- Check the 'auto resolve' box in the alternative window for an existing alternative (see Fig A below)
- OR drag a new alternative into the folder and you'll be prompted to set the auto-resolve setting. (See Fig B below)
- Ensure required parameters are set per 'Parameters' section at the end of this article.

Fig A

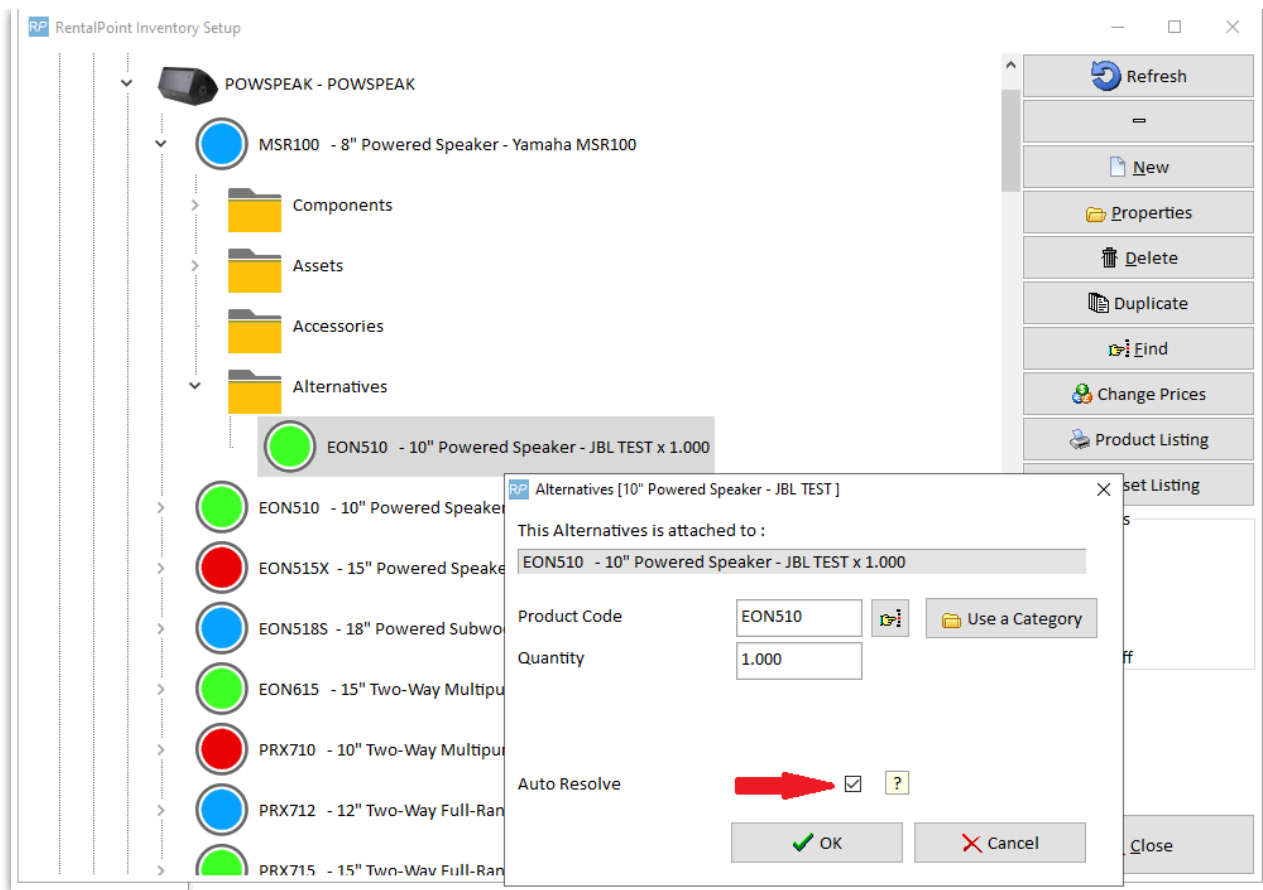
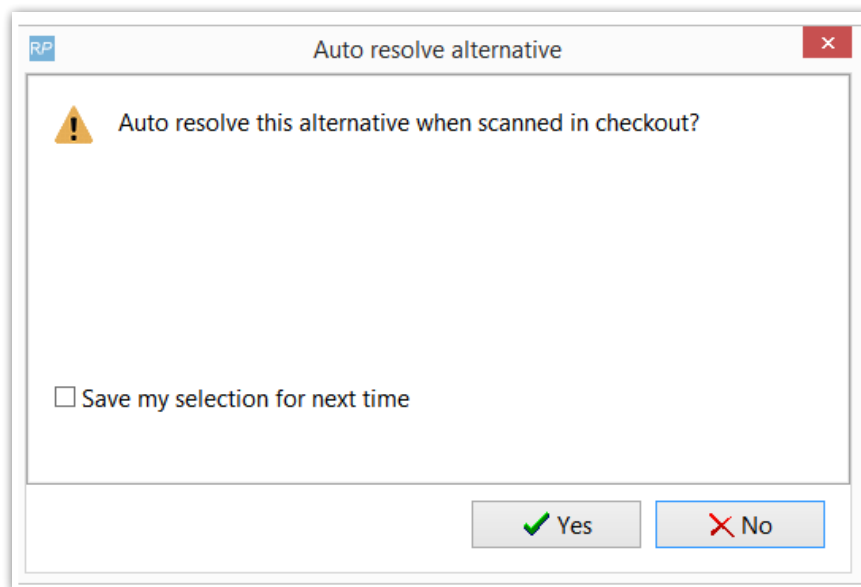


Fig B



Using Auto Resolve

In the Checkout Window, scan the alternative instead of the main item - the example below shows the 10" Powered Speaker scanned out in place of the 8" Speaker that was booked. (note, the 10" Speaker is set up as an 'auto resolve' alternative for the 8" Speaker in Inventory Setup.

See 'set up' section for more details.

RP Checkout equipment, booking: WATBUS00007 from Location :0 - Toronto

Enter Barcode Number Accessories Current Session Equipment Out Returned Losses

Equipment to be bar code scanned in this booking Road case view Equipment checked out this session [non bar code tracked]

Product Code	Description	Qty	Qty Sci	Product Code	Description	Qty	Checked Out
LOOSE STOCK				3SPEAK	3 Foot Mogami Gold Speaker Cab	5	5
NBM1-1	1 Foot RapcoHorizon NBM1 XLR to XLR Audio Pa	1	1	1AGUITAR	1 Foot Mogami Platinum Guitar Pa	3	3
MSR100	8" Powered Speaker - Yamaha MSR100	1	0				

Equipment entered / scanned this session Order Move Cross Rent Nonbarcode

Barcode Number	Description	Qty	Type	Note	Product Code	X-Rent	Description	Qty	Checked Out
NB1005	1 Foot RapcoHorizon NBM1 XLR	1	Single	✓					
2004	10" Powered Speaker - JBL TEST	1	Single	⚠					

1 more of product (EON510 - 10" Powered Speaker - JBL TEST) have been checked out than were b

Errors and warnings Delete item Notes

Barcode Number	Message
2004	1 more of product (EON510 - 10" Powered Speaker - JBL TEST) have been checked out than were booked. This item w

Scan barcodes here + Errors - Errors Show Errors Open Folder Display errors after checkout

Checkout Date: 12-11-19 Checkout Time: 1801 Type: Partial Final

Check Open Info Identify Shortages Product Setup Asset Status Save Cancel

Option 1: Barcode 13 is DISABLED - No pricing options at checkout

The discrepancy is immediately resolved on booking save.

- Original item is set to 'warehouse mute' hiding it from all warehouse documentation
- The shipped alternative is added to the booking under the original item
- A comment is added under the shipped alternative describing the resolution

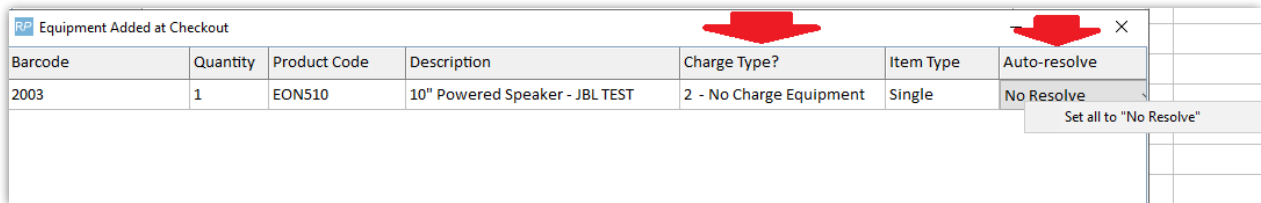
WATBUS00007 Location: 0 - Toronto

Code	Description	Quantity	Avail
MSR100	8" Powered Speaker - Yamaha MSR100	1	WMute
EON510	10" Powered Speaker - JBL TEST	1	OK
	1 X MSR100:8" Powered Speaker - Yamaha MSR100 were ordered		
	EON510 was shipped.		
NBM1-1	1 Foot RapcoHorizon NBM1 XLR to XLR Audio Patch Ca	1	OK
3SPEAK	3 Foot Mogami Gold Speaker Cable 1/4" to 1/4"	5	OK
1AGUITAR	1 Foot Mogami Platinum Guitar Pedal Cable	3	OK

Option 2: Barcode 13 ENABLED - pricing options at checkout

Equipment Added at Checkout Window provides options to

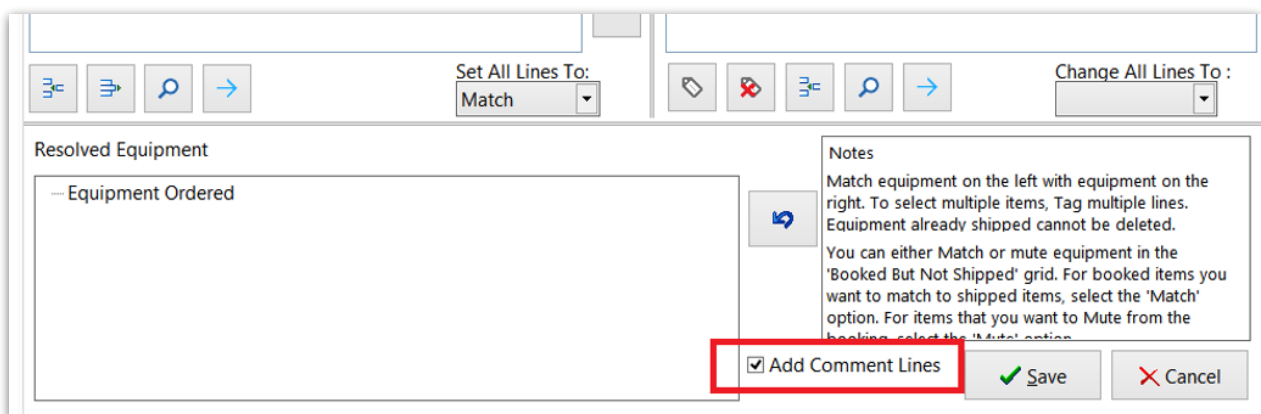
- Leave the resolve to go ahead Or change to 'no resolve' in the Auto Resolve Column OR right click on the Auto resolve column to 'Set all to No Resolve'
- Change the Charge Type for the item



Barcode	Quantity	Product Code	Description	Charge Type?	Item Type	Auto-resolve
2003	1	EON510	10" Powered Speaker - JBL TEST	2 - No Charge Equipment	Single	No Resolve

Other Considerations:

- If there is more than one type of unshipped item that matches the auto-resolve alternative, the user will be provided with an option to choose between available 'auto resolve' alternatives
- If the selected product has already been completely resolved by other items added at checkout, auto-resolve will attempt to resolve other valid unshipped products in the booking.
- User preferences in the 'Resolve Discrepancy' window will determine if a comment is added for Auto Resolve alternatives



Resolved Equipment

Notes

Match equipment on the left with equipment on the right. To select multiple items, Tag multiple lines. Equipment already shipped cannot be deleted.

You can either Match or mute equipment in the 'Booked But Not Shipped' grid. For booked items you want to match to shipped items, select the 'Match' option. For items that you want to Mute from the booking, select the 'Mute' option.

Add Comment Lines

Save Cancel

Parameters

This feature is available when the following parameters are enabled

- Barcode #10 - Equipment can be added at checkout
- Operational #44 - Client Warehouse Active/Mute [<more information on this functionality>](#)

The feature behaves differently depending on settings for the following parameters

- Barcode #13 - Checkout Additional Equipment prompt (for charging options at checkout)

