

Booking Documents

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Standard Booking Documents

Standard documents are built into the system. Unlike custom documents a standard document cannot be modified. There are several documents which will modify the look of a standard document with limited flexibility.

Standard documents are available for the following;

- Invoicing
- Booking Hardcopy / Pick List
- Delivery Sheet
- Collection Docket

Any of the above mentioned options can be selected to print using a standard document though there is more than one way of accessing them.

A shortcut to the standard documents is available by pressing F6 on your keyboard. This will display the invoicing window.

Booking Hardcopy.

This report can also be called a Pick List. There are several options available for this report which includes the Consolidated version. This option will group some products into one line and provide totals for equipment groups.

RP RentalPoint Version 11 Parameter Setup

Company Name Accounts Invoicing Custom Printing **Booking Hardcopy**

Pricing Setup Operational S **Select Booking Hardcopy Parameter**

Web and Email Transfers

Search param

Parameter Notes

***** Booking Hardcopy Setup *****

- * Standard BHC Only *
- 3. Top Margin (in lines)
- 4. Bottom Margin (in lines)
- 5. Print Pre-payments
- 6. Footing Required on Multiple Pages
- 7. Print Total Undiscounted Amount
- 8. Quality Assurance Form Number
- 9. Default Contact Numbers to Print
- * Standard BHC and Custom RTF *
- 11. Fields Selected and Highlighted
- 12. Exclude Sub hire Equipment
- 13. Re-check Shortages
- * All Reports *
- 15. Only Print for Confirmed Order
- 16. Can Print for Deleted Booking
- 17. Left margin

✓ Select

✗ Close

Search Filter

RP Pick List Print X

Booking No To Print TORRITZ00003 [What is this?](#)

Prices <input type="radio"/> With prices <input checked="" type="radio"/> Without prices	Print to <input type="radio"/> Printer <input checked="" type="radio"/> Screen	Type of Printout <input checked="" type="radio"/> All equipment <input type="radio"/> Differential	Template Type <input checked="" type="radio"/> Standard <input type="radio"/> Custom
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Scope <input checked="" type="radio"/> Single booking <input type="radio"/> All on delivery date <input type="radio"/> All for project <input type="radio"/> For heading	<input type="text"/> <input type="button" value="Calendar"/> <input type="text"/> <input type="button" value="Print"/>	<input checked="" type="checkbox"/> Include booking notes <input checked="" type="checkbox"/> Include package components <input checked="" type="checkbox"/> Indent components <input type="checkbox"/> Include Labour <input type="checkbox"/> Print groups on separate pages <input type="checkbox"/> Include required technicians only
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Consolidation <input checked="" type="radio"/> None <input type="radio"/> Consolidate - Group Same Products Into One Line	<input type="button" value="Help"/>
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Equipment Group Selection <input checked="" type="radio"/> All Groups <input type="radio"/> Selected Group	<input type="checkbox"/> AUDIO-Audio Equipment <input type="checkbox"/> CABLES-Audio Visual Cables and acc	<input type="button" value="Help"/>
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Project Options <input checked="" type="radio"/> All <input type="radio"/> For Venue Room <input type="radio"/> For Delivery Date	<input type="text"/> <input type="button" value="Calendar"/> <input type="text"/> <input type="button" value="Calendar"/>	<input type="button" value="Help"/>
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Delivery Sheet documents

By default there are 3 copies of the Delivery sheet that get printed out. Each has a separate title. This is controlled by parameter Invoicing #21. Removing a title by prevent the report from printing out.

Custom Booking Documents

Custom documents have the flexibility to be edited in Microsoft Word. Custom templates are rich text files (.rtf) that contain regular text as well as RentalPoint insert fields. These codes are read by RentalPoint and allow it to pull information from the database directly into the document. This provides the ability to produce highly customized paperwork.

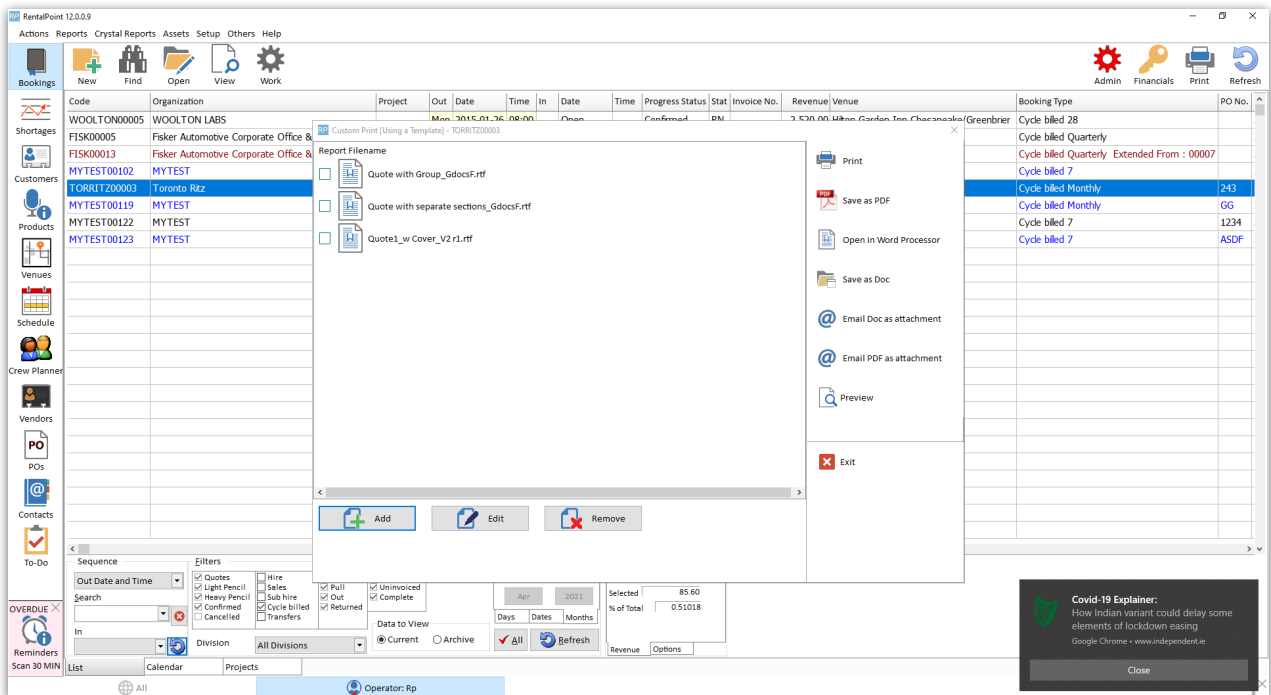
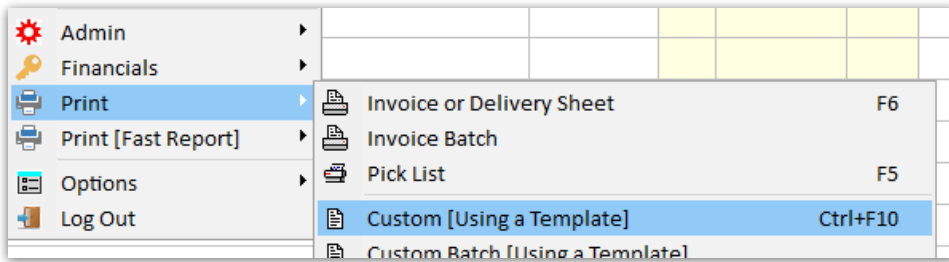
Custom documents must be saved as a rich text file (.rtf) and NOT a word document file (.doc). A .doc file is not compatible with the RentalPoint insert fields and will not print information correctly.

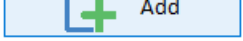
Since these documents can be edited in Microsoft Word, RentalPoint provides you with an insert module that you can install in your Word add-in area. With this module it is possible to create the templates to your specifications and layout.

RentalPoint suggests that users take the default templates that are shipped with the system and

create copies of them for editing and testing.

Select the booking the custom document needs to be printed for. From the Right click menu select Print and Custom Using a Template Option. A selection screen will display so you can select the custom document you want to print.



New templates must be placed in the Template folder. By clicking the  button the system will open up to that folder. From there select the required template, once done it will display in the list of options.

> This PC > Local Disk (C:) > RP12 > docs > Templates

Name	Date modified	Type	Size
Final Invoice_SepLabour_GdocsF.rtf	2021-01-21 9:25 AM	Rich Text Format	1335 KB
BookingHardcopy_rev5.1.rtf	2020-09-14 5:14 PM	Rich Text Format	5802 KB
Quote1_w Cover_V2 r1.rtf	2020-11-04 5:11 PM	Rich Text Format	4212 KB
Quote1_w Cover_V2 r2.rtf	2020-11-04 5:07 PM	Rich Text Format	4212 KB
Quote1_w Cover_V2.rtf	2020-11-04 4:50 PM	Rich Text Format	4212 KB
Invoice_GdocsF.rtf	2019-10-07 11:28 AM	Rich Text Format	1325 KB
CreditNote_GdocsF refund.rtf	2019-05-15 4:53 PM	Rich Text Format	1293 KB
BookingHardcopy_GdocsF.rtf	2019-01-31 12:09 PM	Rich Text Format	75 KB
Cartnote_GdocsF.rtf	2019-01-31 12:09 PM	Rich Text Format	1275 KB
CreditNote_GdocsF.rtf	2019-01-31 12:09 PM	Rich Text Format	1291 KB
CrewSchedule_GdocsF.rtf	2019-01-31 12:09 PM	Rich Text Format	156 KB
CustomerInfoSheet_GdocsF.rtf	2019-01-31 12:09 PM	Rich Text Format	1286 KB
DeliverySheet_GdocsF.rtf	2019-01-31 12:09 PM	Rich Text Format	1295 KB
Deposit Invoice_GdocsF.rtf	2019-01-31 12:09 PM	Rich Text Format	1363 KB

RentalPoint also offers several options in what the final output will be. It is possible to merge the document directly into a PDF or attach to emails.

It is possible to print out more than one template at a time. Once the finished document is merged and displayed it is added as an attachment to the booking you printed from.

Custom Templates have the ability to contain separate sections on the same report. It is possible to include both Rental and Sales items on the same report.

Depending on the user's system the files may "inflate" to very large file sizes.

A fix for this is to make a change to the system's registry. A change to the registry should only be made by a qualified person. A backup to the registry should be completed before any changes are made.

Once the backup is complete follow the [Microsoft Support](#) steps recommended which will guide you through the steps to limit RTF files sizes.

Booking Contact Documentation





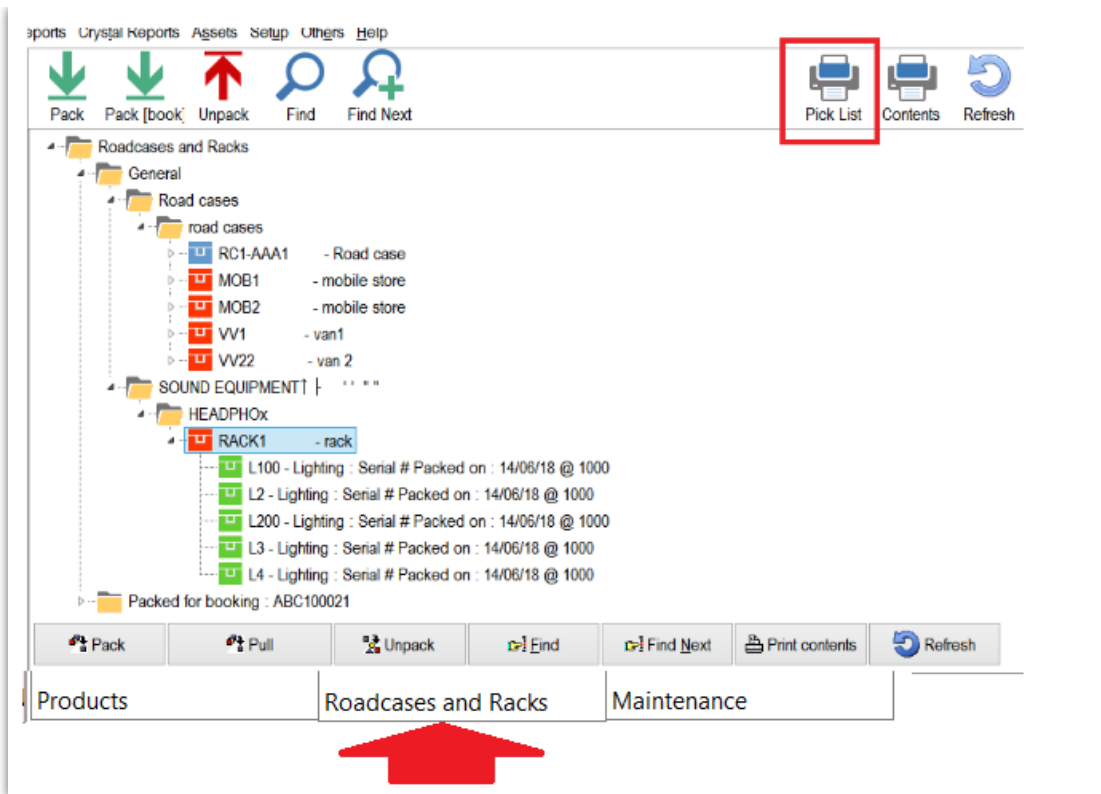
Booking Hardcopy / Picklist





Printing a Picklist for Racks & Roadcases

A pick list for a road case or rack lists the items that were previously packed into it. To print the pick list for a road case or rack, either click the 'Pick List' button and enter the rack/roadcase barcode or select the barcode from the tree before clicking the button.



Pick List

Printed 18/06/18 @ 1600 Roadcase : RACK1 rack Page : 1

Code	Description	Serial No.	Stock#	Qty	Packed on	Packed by
I4	Lighting		12		14/06/18 @ 1000	JM
I3	Lighting		11		14/06/18 @ 1000	JM
L2	Lighting		10		14/06/18 @ 1000	JM
L100	Lighting		108		14/06/18 @ 1000	JM
L200	Lighting		208		14/06/18 @ 1000	JM

A pick list can also be printed for the road case/rack from the pack window.

Pack a Rack Description

RACK1 Enter rack

Item Barcode

Enter Search

Enable quantity prompt when scanning in non-barcode tracked items.

Scan items as 'Fixed'

Print Pick List Unpack Item

Barcode	Description	Serial #	Stock #	Quantity	Fixed
L4	Lighting		12	1	<input checked="" type="checkbox"/>
L3	Lighting		11	1	<input checked="" type="checkbox"/>
L100	Lighting		108	1	<input checked="" type="checkbox"/>
L200	Lighting		208	1	<input checked="" type="checkbox"/>

Updating the 'Pick List'

When you pack an empty road case/rack, a button will be displayed indicating that the pick list will be updated with the items packed (any barcodes packed for previous use of the roadcase will

be removed from the current pick list).

If more items are added later these will be added to the pick list as well.

Pack a Rack

Description

RACK1 Enter rack

Item Barcode

Enter Search

Enable quantity prompt when scanning in non-barcode tracked items.

Scan items as 'Fixed'

Print Pick List Unpack Item

Barcode	Description	Serial #	Stock #	Quantity	Fixed
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Errors and Warnings

Code	Message
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Save and set as PickList Cancel

Print Contents

The 'Print contents' option will print only the items currently in the road case/rack.

Print Pack History

In the right-click menu there's an option to print the pack history, which will list all the items that had previously been packed as well as the pack date and the operator.

Virtual Carnet Documentation

[\[Open Carnet Documentation\]](#)