

Projects

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Projects



Returning Projects





Optimal Equipment for Projects

What is it?

When bookings are added to a project entered for a festival or event, there may be equipment that is not required for the entire duration of the project that can be reused for another booking on the same event.

The optimal equipment report helps the warehouse pick the minimum number of items needed for the entire project. This is helpful if all the equipment will be delivered at the beginning of the festival/event and returned after the festival/event has ended.

NOTE: If you are planning to pick up equipment during the event and send it to bookings outside of the project/festival/event, then this feature (Optimal equipment), should not be used.

Project

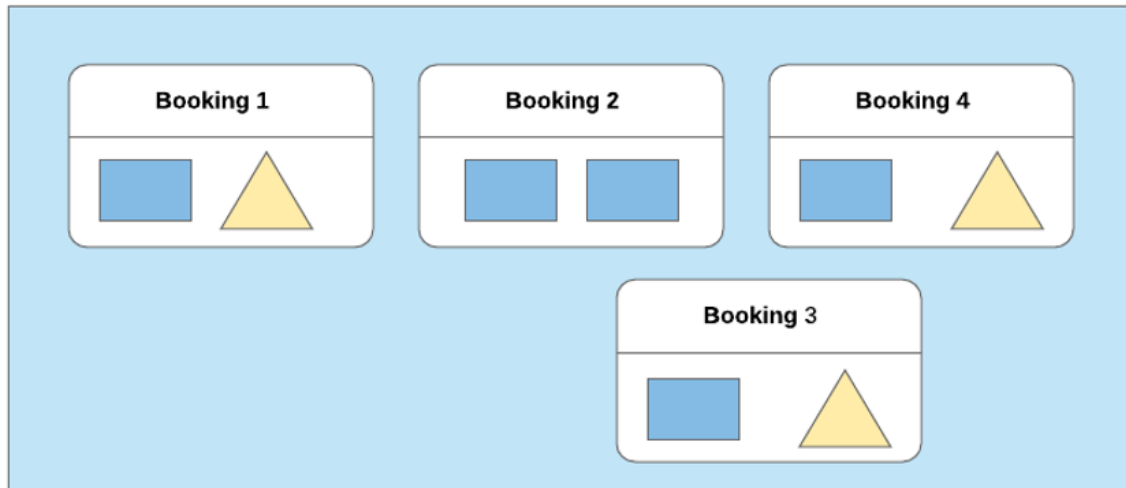


fig 1.

**** Enable the optimal equipment report using Operational parameter #116 ****

How is optimal equipment calculated?

Optimal equipment is calculated similarly to the running balance, where items are subtracted and added to the stock balance as they move out of and back into the warehouse.

For optimal equipment, we have an additional free stock pool at the event that can be used before having to pull from the warehouse. When a booking in the project ends, the equipment used on the booking is added to the free stock pool. The next booking can pull from the free stock first and then from the warehouse if needed.

Example 1:

In the example below, the booking dates do not overlap each other so the second and third bookings can use some or all stock from the preceding booking.

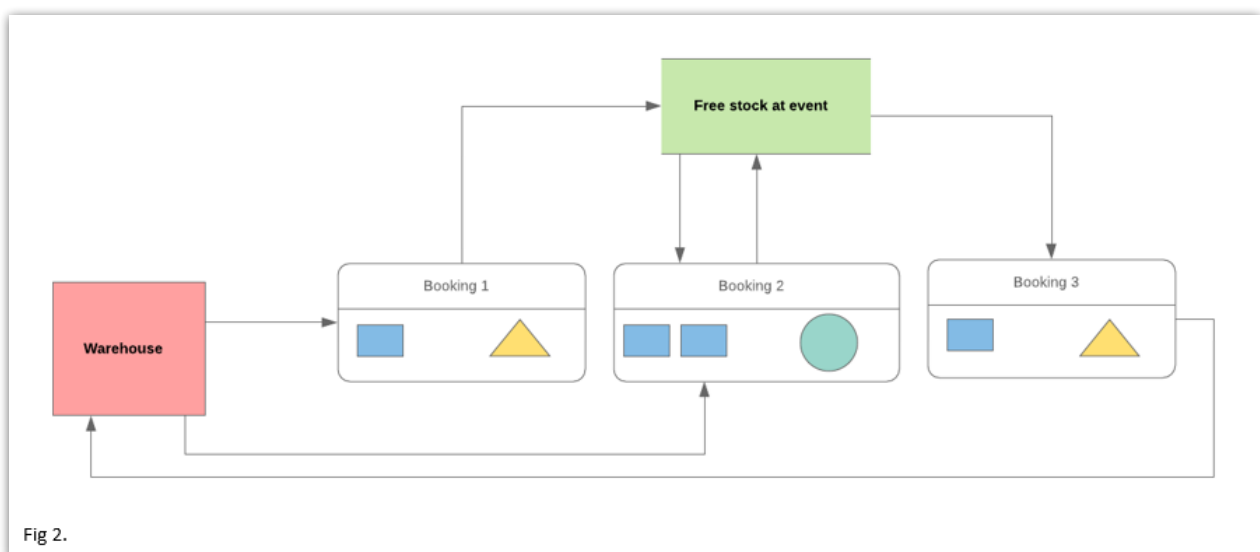
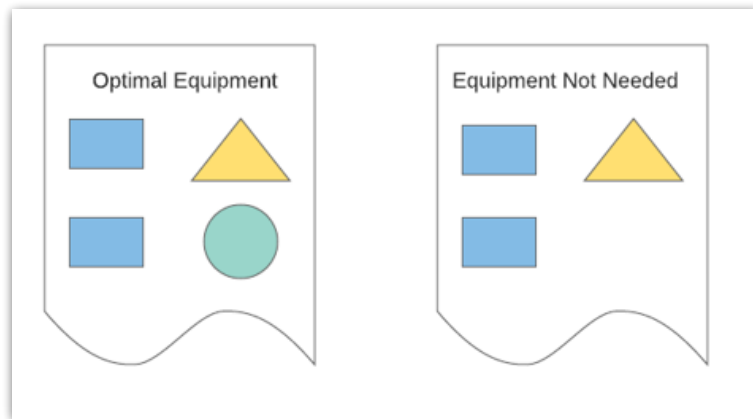


Fig 2.

The optimal equipment report will show the minimum number of items that need to be sent;

while the 'Equipment not needed' report will show items on the booking that don't need to be sent.

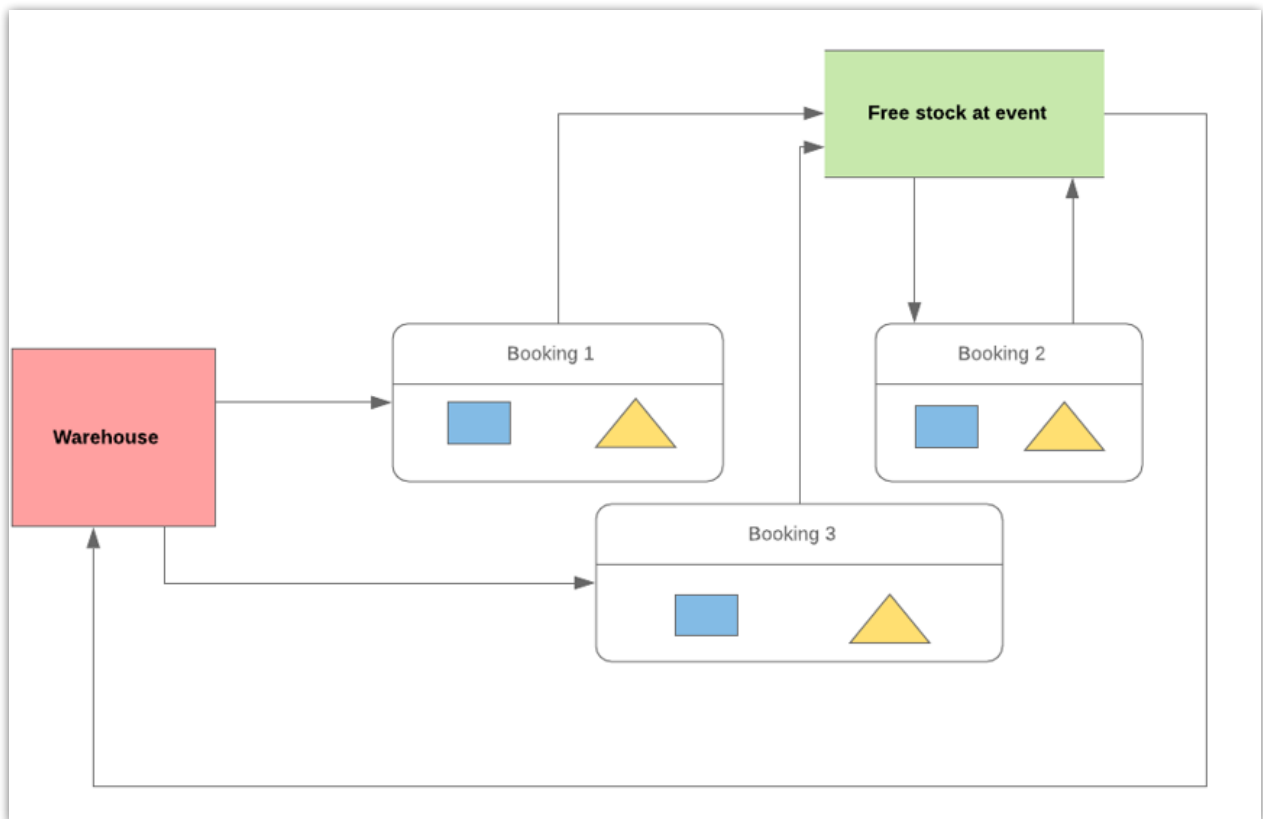
In this case, four of the items from the bookings are needed while one item from booking 2 and both from booking 3 are unneeded.

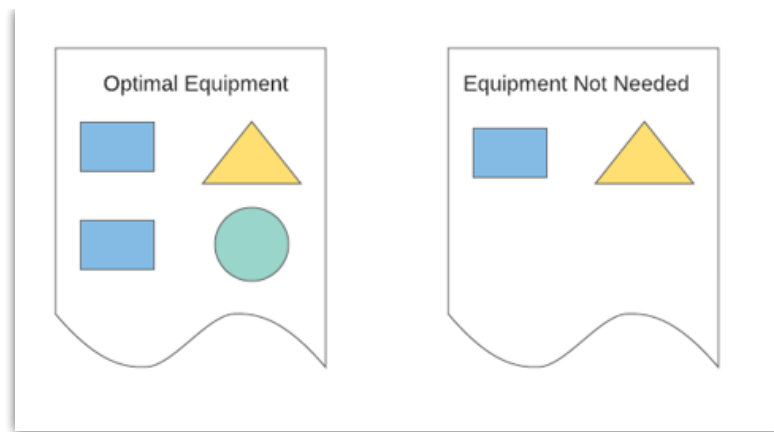


Example 2:

In the example below, one booking overlaps the other two, so in this case

- Equipment from Booking 1 and Booking 3 will need to be shipped
- Equipment from Booking 2 is not needed since it can be taken from Booking 1





Optimized Equipment

- Project Inventory is optimized based on the warehouse out and warehouse in dates of each booking. Even though all the gear for the project is moving out from and into the warehouse on the same dates, in order for the gear to be optimized, the booking warehouse out and in dates should show when the gear is actually being used on site.
- Items not needed on site are set to 'Warehouse mute' in the booking. This hides the items from the warehouse so they won't show up in the checkout window or the pick list
- Items not needed on site are still included in the pricing and appear on quotes and invoices.
- If only part of a line is needed when the project equipment is optimized, then the equipment line will be split to show the required items on one line and the gear not needed on another.
- For FastReport Templates use `tblItemtran.warehouseMutedPerOER` to determine the lines excluded due to Project Optimization
- If you are planning to pick up equipment during the event and send it to bookings outside of the project/festival/event, then this feature (Optimal equipment), should not be used.

Note: when using "First come first serve" the equipment reservations are reset when applying 'warehouse mute' equipment changes. This will prevent the project from causing shortages on bookings outside of the project.

Parameters Needed

Goto Setup-->Parameters-->Operational, then set as follows:

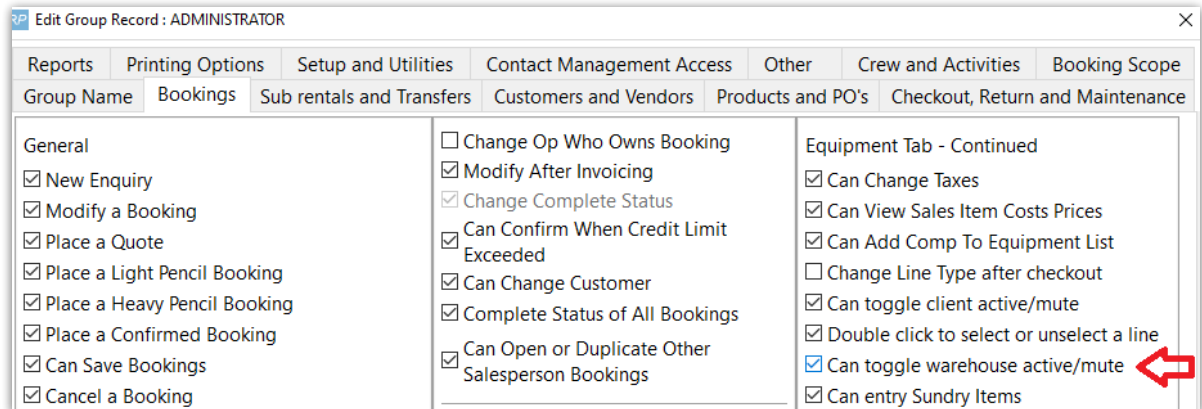
1. Setup Parameters-->Operational #116 "Use Optimal Equipment Reporting" -->YES
2. Setup Parameters -> Operational #44 "Client Facing and Warehouse Active/Mute equipment" -> YES
3. Setup Parameters -> Operational #88 "Enable Preparation Time" -> YES

** You'll need to set these first, then log out of RentalPoint and back in again before setting Operator Privileges.

Operator Privileges Needed

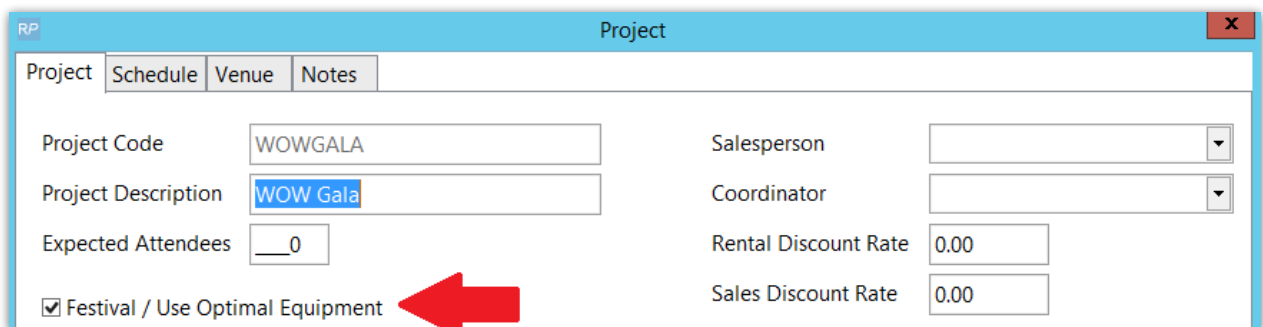
Setup-->Operators-->Edit Operator Group -> Bookings Tab --> "Can Toggle Warehouse Active Mute"--> Checked

1.



Setting up the Project for Optimal Equipment Use

When entering a project for a festival ensure the 'Festival / Use Optimal Equipment' option is checked - see screenshot below



Then click on the Schedule tab, where you can define the dates for the project.

- The Prep Start Date and De-prep End Date will define the first and last date that the equipment is needed for the event.
- When optimized, unneeded equipment is hidden from the warehouse (see below), these dates will be applied to each booking.

Project Schedule Venue Notes

Prep Start Date 06/02/22 Time 0800 Days Using 12__

Warehouse Out Date 06/03/22 Time 0700

Show Starting Date 06/03/22 Time 0700

Show Ending Date 06/13/22 Time 2200

Warehouse In Date 06/14/22 Time 1600

Deprep End Date 06/15/22 Time 1700

Booking Equipment Grid *Before* Optimization

Booking 1

Modify booking

Out 06/03/22 0800 In 06/14/22 1600 WOWAUD00002 Region 0 - EAST Location 0 - Main

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

Code	Description	Quantity	Avail	Short	Sub Rental	Unit Rate	Days	%disc	Price	Stat	Prep/De	C	W
SAM60	60" Samsung LED Touchscreen	1	13	0	0	500.00	1	0.00	500.00	Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAMTVREM	Samsung TV Remote	1	19	0	0	0.00	1	0.00	0.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TVBRAK	TV Adjustable Wall Bracket	1	14	0	0	0.00	1	0.00	0.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Breakout Session 1 Days : 12													
BP51	Sigma BP-51 Lithium-Ion Battery Pack 7.2V 1200mAh	1	0	1	1	500.00	7	0.00	1,500.00	Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ALTS315	Alto TS315 Speaker	1	0	1	1	75.00	7	0.00	225.00	Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SIGFP	Sigma fp L Mirrorless Digital Camera	1	0	1	1	500.00	7	0.00	1,500.00	Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Breakout Session 2 Days : 12													
RCFNX15	RF 15 Floor Standing Speaker	1	2	0	0	80.00	7	0.00	240.00	Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NX15CASE	RCF NX15 Speaker CASE	1	11	0	0	0.00	7	0.00	0.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NX1510	NX15 10' Cable	1	97	0	0	50.00	7	0.00	150.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Warehouse active/mute

Booking 2

Modify booking

Out 06/03/22 0900 In 06/06/22 1930 WOWAUD00005 Region 0 - EAST Location 0 - Main

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

Code	Description	Quantity	Avail	Short	Sub Rental	Unit Rate	Days	%disc	Price	Stat	Prep/De	C	W
Breakout Session 1 Days : 4													
ALTS315	Alto TS315 Speaker	6	3	3	3	75.00	7	0.00	1,350.00	Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TS315CAS	Alto TS315 Speaker CASE	3	2	1	1	0.00	7	0.00	0.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TS315CAB	TS315 10' Cable	6	8	0	0	0.00	7	0.00	0.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SIGFP	Sigma fp L Mirrorless Digital Camera	6	4	2	2	500.00	7	0.00	9,000.00	Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EVF11	Sigma EVF-11 Electronic Viewfinder	6	4	2	2	500.00	7	0.00	9,000.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BP51	Sigma BP-51 Lithium-Ion Battery Pack 7.2V 1200mAh	6	3	3	3	500.00	7	0.00	9,000.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
STRAPH	2 x Sigma Strap Holder for fp Camera	6	9	0	0	500.00	7	0.00	9,000.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SIGHU	Sigma HU-11 Hot Shoe Unit	6	4	2	2	500.00	7	0.00	9,000.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SIGBCAP	Sigma LCT-II-TL Body Cap	6	4	2	2	500.00	7	0.00	9,000.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SIGADAP	Sigma UAC-21 USB AC Adapter	6	4	2	2	500.00	7	0.00	9,000.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SIGCAB	Sigma SUC-41 USB Cable	6	9	0	0	500.00	7	0.00	9,000.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Breakout Session 2 Days : 4													
RCFNX15	RF 15 Floor Standing Speaker	1	2	0	0	80.00	7	0.00	240.00	Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NX15CASE	RCF NX15 Speaker CASE	1	11	0	0	0.00	7	0.00	0.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NX1510	NX15 10' Cable	1	97	0	0	50.00	7	0.00	150.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAM60	60" Samsung LED Touchscreen	1	13	0	0	500.00	7	0.00	1,500.00	Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAMTVREM	Samsung TV Remote	1	19	0	0	0.00	7	0.00	0.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TVBRAK	TV Adjustable Wall Bracket	1	14	0	0	0.00	7	0.00	0.00	prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Warehouse active/mute

Booking 3

Modify booking

Out 06/07/22 0700 In 06/11/22 1900 WOWAUD00010 Region 0 - EAST Location 0 - Main

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

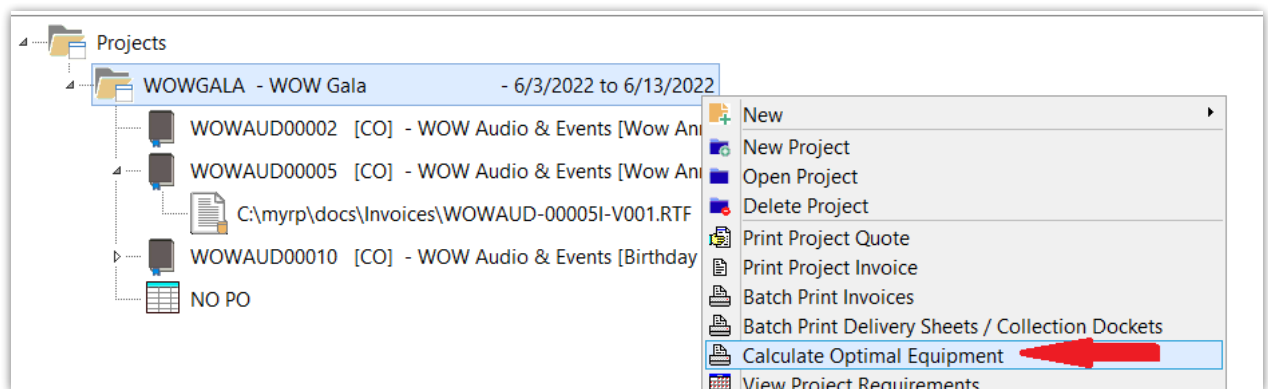
Seq # 110

Code	Description	Quantity	Avail	Short	Sub Rental	Unit Rate	Days	%disc	Price	Stat	Prep/De	C	W
Breakout Room 1 Days: 5													
SOU PAC	Basic Sound System	1	See	List	0	800.00	0	0.00	0.00	PAK			
	test cost:500.00								750.00	sund			
ALTS315	Alto TS315 Speaker	1	0	1	1	228.56	0	0.00	0.00	prt			
TS315CAS	Alto TS315 Speaker CASE	1	1	0	0	0.00	0	0.00	0.00	prt			
TS315CAB	TS315 10' Cable	1	4	0	0	114.32	0	0.00	0.00	prt			
NX1510	NX15 10' Cable	1	98	0	0	50.00	0	0.00	0.00	prt			
MXPRO	MX Processor	1	15	0	0	457.12	0	0.00	0.00	prt			
SUBW	Subwoofer	2	0	2	2	0.00	0	0.00	0.00	Sng			
Breakout Room 2 Days: 5													
SOU PAC	Basic Sound System	1	See	List	0	800.00	0	0.00	0.00	PAK			
ALTS315	Alto TS315 Speaker	1	0	1	1	0.00	0	0.00	0.00	prt			
TS315CAS	Alto TS315 Speaker CASE	1	0	1	1	0.00	0	0.00	0.00	prt			
TS315CAB	TS315 10' Cable	1	3	0	0	0.00	0	0.00	0.00	prt			
NX1510	NX15 10' Cable	1	97	0	0	0.00	0	0.00	0.00	prt			
MXPRO	MX Processor	1	14	0	0	457.14	0	20.00	0.00	Sng			
SUBW	Subwoofer	2	0	2	2	0.00	0	0.00	0.00	Sng			

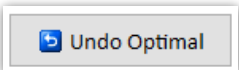
Warehouse active/mute

Running the Optimal Equipment Report

View the optimal equipment by right clicking on the project and selecting **Calculate Optimal Equipment** from the menu.



Items that don't need shipping are displayed under the 'Equipment Not Needed' tab (see below). These items can be reused from the 'Free Stock' at the event when earlier events at the site no longer need them.

Click  to use reverse all project optimization

RP Optimal Equipment for WOW Gala

Equipment Not Needed | Equipment Needed

Booking No.	Out Date	Heading	Not Needed	Already Out	Product code	Product Description
<i>WOWAUD00010</i>	<i>06/07/22</i>	<i>Breakout Room 1</i>	<i>1</i>	<i>0</i>	<i>ALTS315</i>	<i>Alto TS315 Speaker</i>
<i>WOWAUD00010</i>	<i>06/07/22</i>	<i>Breakout Room 2</i>	<i>1</i>	<i>0</i>	<i>ALTS315</i>	<i>Alto TS315 Speaker</i>
<i>WOWAUD00010</i>	<i>06/07/22</i>	<i>Breakout Room 1</i>	<i>1</i>	<i>0</i>	<i>NX1510</i>	<i>NX15 10' Cable</i>
<i>WOWAUD00010</i>	<i>06/07/22</i>	<i>Breakout Room 1</i>	<i>1</i>	<i>0</i>	<i>TS315CAB</i>	<i>TS315 10' Cable</i>
<i>WOWAUD00010</i>	<i>06/07/22</i>	<i>Breakout Room 2</i>	<i>1</i>	<i>0</i>	<i>TS315CAB</i>	<i>TS315 10' Cable</i>
<i>WOWAUD00010</i>	<i>06/07/22</i>	<i>Breakout Room 2</i>	<i>1</i>	<i>0</i>	<i>TS315CAS</i>	<i>Alto TS315 Speaker CASE</i>
<i>WOWAUD00010</i>	<i>06/07/22</i>	<i>Breakout Room 1</i>	<i>1</i>	<i>0</i>	<i>TS315CAS</i>	<i>Alto TS315 Speaker CASE</i>

Items in italics have been hidden from the warehouse. Note : 'Undo' does not affect items hidden manually in the booking.

Undo Optimal | Print | Close

The second tab displays the **Equipment Needed** (quantity of each item) that needs to be shipped for the entire duration of the project (event/festival).

RP Optimal Equipment for WOW Gala

Equipment Not Needed | Equipment Needed

Group code	Group Description	Needed	Product code	Product Description
AUDIO	AUDIO	2	SOUPAC	Basic Sound System
AUDIO	AUDIO	2	MXPRO	MX Processor
AUDIO	AUDIO	4	SUBW	Subwoofer
AUDIO	AUDIO	7	SIGADAP	Sigma UAC-21 USB AC Adapter
AUDIO	AUDIO	7	ALTS315	Alto TS315 Speaker
AUDIO	AUDIO	2	RCFNX15	RF 15 Floor Standing Speaker
AUDIO	AUDIO	3	NX1510	NX15 10' Cable
AUDIO	AUDIO	7	TS315CAB	TS315 10' Cable
AUDIO	AUDIO	4	TS315CAS	Alto TS315 Speaker CASE
AUDIO	AUDIO	2	NX15CASE	RCF NX15 Speaker CASE
VIDEO	VIDEO	7	SIGBCAP	Sigma LCT II-TL Body Cap
VIDEO	VIDEO	7	SIGHU	Sigma HU-11 Hot Shoe Unit
VIDEO	VIDEO	7	STRAPH	2 x Sigma Strap Holder for fp Camera
VIDEO	VIDEO	8	BP51	Sigma BP-51 Lithium-Ion Battery Pack 7.2V 1200mAh
VIDEO	VIDEO	7	EVF11	Sigma EVF-11 Electronic Viewfinder
VIDEO	VIDEO	7	SIGCAB	Sigma SUC-41 USB Cable
VIDEO	VIDEO	7	SIGDP	Sigma SD-1 Merrill Digital Camera

Undo Optimal | Print | Close

Click the **Print** button on the bottom of the window to print optimization results to an Excel file.

Optimal Equipment for WOWGALA Printed 31.1.2022-1341.CSV - Excel

File Home Insert Page Layout Formulas Data Review View Developer QuickBooks Team Tell me what you want to do...

Clipboard Font Alignment Number Styles

A1 Main Project : WOWGALA WOW Gala Printed : 01/31/22

Group code	Group Description	Needed	Product code	Product Description
7	AUDIO		SOUPAC	Basic Sound System
8	AUDIO	2	MXPRO	MX Processor
9	AUDIO	4	SUBW	Subwoofer
10	AUDIO	7	SIGADAP	Sigma UAC-21 USB AC Adapter
11	AUDIO	7	ALTS315	Alto TS315 Speaker
12	AUDIO	2	RCFNX15	RF 15 Floor Standing Speaker
13	AUDIO	3	NX1510	NX15 10' Cable
14	AUDIO	7	TS315CAB	TS315 10' Cable
15	AUDIO	4	TS315CASE	Alto TS315 Speaker CASE
16	AUDIO	2	NX15CASE	RCF NX15 Speaker CASE
17	VIDEO	7	SIGBCAP	Sigma LCT II-TL Body Cap
18	VIDEO	7	SIGHU	Sigma HU-11 Hot Shoe Unit
19	VIDEO	7	STRAPH	2 x Sigma Strap Holder for fp Camera
20	VIDEO	8	BPS1	Sigma BP-51 Lithium-Ion Battery Pack 7.2V 1200mAh
21	VIDEO	7	EVF11	Sigma EVF-11 Electronic Viewfinder
22	VIDEO	7	SIGCAB	Sigma SUC-41 USB Cable
23	VIDEO	7	SIGFP	Sigma fp L Mirrorless Digital Camera
24	VIDEO	2	SAMTVREM	Samsung TV Remote
25	VIDEO	2	SAM60	60" Samsung LED Touchscreen
26	VIDEO	2	TVBRAK	TV Adjustable Wall Bracket

Equipment not needed (Equipment to be eliminated / does not need to be picked)

Booking No.	Out Date	Heading	Not Needed	Already Out	Product code	Product Description
31	06/07/22	Breakout	1		0 ALTS315	Alto TS315 Speaker
32	06/07/22	Breakout	1		0 ALTS315	Alto TS315 Speaker
33	06/07/22	Breakout	1		0 NX1510	NX15 10' Cable
34	06/07/22	Breakout	1		0 TS315CAB	TS315 10' Cable
35	06/07/22	Breakout	1		0 TS315CAB	TS315 10' Cable
36	06/07/22	Breakout	1		0 TS315CASE	Alto TS315 Speaker CASE

Optimal Equipment for WOWGALA

Items NOT needed are 'hidden' from warehouse view using the warehouse active/mute checkbox on the equipment grid of the booking. These items will not show up on warehouse paperwork.

Modify booking

Out 06/07/22 0700 In 06/11/22 1900 WOWAUD00010 Region 0 - EAST Location 0 - Main

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

Code	Description	Quantity	Avail	Short	Sub Rental	Unit Rate	Days	%disc	Price/Stat	Prep/De	C	W
Breakout Room 1 Days: 5												
SOUPAC	Basic Sound System	1	See	List	0	800.00	5	0.00	0.00 PAK		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
test cost:500.00												
ALTS315	Alto TS315 Speaker	1	WMute	0	0	228.56	0	0.00	0.00 prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TS315CASE	Alto TS315 Speaker CASE	1	WMute	0	0	0.00	0	0.00	0.00 prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TS315CAB	TS315 10' Cable	1	WMute	0	0	114.32	0	0.00	0.00 prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NX1510	NX15 10' Cable	1	WMute	0	0	50.00	0	0.00	0.00 prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MXPRO	MX Processor	1	15	0	0	457.12	0	0.00	0.00 prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SUBW	Subwoofer	2	0	2	2	0.00	0	0.00	0.00 Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Breakout Room 2 Days: 5												
SOUPAC	Basic Sound System	1	See	List	0	800.00	5	0.00	0.00 PAK		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ALTS315	Alto TS315 Speaker	1	WMute	0	0	0.00	0	0.00	0.00 prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TS315CASE	Alto TS315 Speaker CASE	1	WMute	0	0	0.00	0	0.00	0.00 prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TS315CAB	TS315 10' Cable	1	WMute	0	0	0.00	0	0.00	0.00 prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NX1510	NX15 10' Cable	1	98	0	0	0.00	0	0.00	0.00 prt		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MXPRO	MX Processor	1	14	0	0	457.14	0	20.00	0.00 Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SUBW	Subwoofer	2	0	2	2	0.00	0	0.00	0.00 Sng		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Warehouse active/mute

Undo Optimal Equipment

In the event that all items on the booking are needed (perhaps because some of the booking dates have changed OR gear will now be sent out at a later date or on to other bookings), the

Undo Optimal

option can be used. This will affect only gear that was set to 'warehouse mute' by the Optimal Equipment Report.

The screenshot shows a window titled "Optimal Equipment for WOW Gala". It contains a table with columns: Booking No., Out Date, Heading, Not Needed, Already Out, Product code, and Product Description. The table lists several bookings for "Breakout Room 1" and "Breakout Room 2" with various equipment like speakers and cables. A "Confirm" dialog box is overlaid on the table, asking: "UNDO Optimal Equipment for Project will mark all gear for all bookings in the project as NEEDED. Proceed with undo optimal equipment?" with "Yes" and "No" buttons. Below the table, there is a note: "Items in italics have been hidden from the warehouse. Note : 'Undo' does not affect items hidden manually in the booking." At the bottom of the window, there are buttons for "Undo Optimal", "Print", and "Close".

Booking No.	Out Date	Heading	Not Needed	Already Out	Product code	Product Description
WOWAUD00010	06/07/22	Breakout Room 1	1	0	ALTS315	Alto TS315 Speaker
WOWAUD00010	06/07/22	Breakout Room 2	1	0	ALTS315	Alto TS315 Speaker
WOWAUD00010	06/07/22	Breakout Room 1	1	0	NX1510	NX15 10' Cable
WOWAUD00010	06/07/22	Breakout Room 1	1	0	TS315CAB	TS315 10' Cable
WOWAUD00010	06/07/22	Breakout Room 2	1	0	TS315CAB	TS315 10' Cable
WOWAUD00010	06/07/22	Breakout Room 2	1	0	TS315CAS	Alto TS315 Speaker CASE
WOWAUD00010	06/07/22					Speaker CASE

Items previously optimized will be set back to 'warehouse active', now visible on warehouse documentation.

The screenshot shows a "Modify booking" window for booking WOWAUD00010. It displays a detailed list of equipment items with columns: Code, Description, Quantity, Avail, Short, Sub Rental, Unit Rate, Days, %disc, Price, Stat, Prep/De, C, and W. The items are grouped by heading: "Breakout Room 1" and "Breakout Room 2". Each item has a "W" column with a checkmark, indicating it is now "warehouse active". A red arrow at the bottom right points to the "Warehouse active/mute" status.

Code	Description	Quantity	Avail	Short	Sub Rental	Unit Rate	Days	%disc	Price	Stat	Prep/De	C	W
Breakout Room 1 Days : 5													
SROUPAC	Basic Sound System	1	See	List	0	800.00	0	0.00	0.00	PAK			<input checked="" type="checkbox"/>
	test cost:500.00								750.00	sund			<input checked="" type="checkbox"/>
ALTS315	Alto TS315 Speaker	1	0	1	1	228.56	0	0.00	0.00	prt			<input checked="" type="checkbox"/>
TS315CAS	Alto TS315 Speaker CASE	1	1	0	0	0.00	0	0.00	0.00	prt			<input checked="" type="checkbox"/>
TS315CAB	TS315 10' Cable	1	4	0	0	114.32	0	0.00	0.00	prt			<input checked="" type="checkbox"/>
NX1510	NX15 10' Cable	1	98	0	0	50.00	0	0.00	0.00	prt			<input checked="" type="checkbox"/>
MXPRO	MX Processor	1	15	0	0	457.12	0	0.00	0.00	prt			<input checked="" type="checkbox"/>
SUBW	Subwoofer	2	0	2	2	0.00	0	0.00	0.00	Sng			<input checked="" type="checkbox"/>
Breakout Room 2 Days : 5													
SROUPAC	Basic Sound System	1	See	List	0	800.00	0	0.00	0.00	PAK			<input checked="" type="checkbox"/>
ALTS315	Alto TS315 Speaker	1	0	1	1	0.00	0	0.00	0.00	prt			<input checked="" type="checkbox"/>
TS315CAS	Alto TS315 Speaker CASE	1	0	1	1	0.00	0	0.00	0.00	prt			<input checked="" type="checkbox"/>
TS315CAB	TS315 10' Cable	1	3	0	0	0.00	0	0.00	0.00	prt			<input checked="" type="checkbox"/>
NX1510	NX15 10' Cable	1	97	0	0	0.00	0	0.00	0.00	prt			<input checked="" type="checkbox"/>
MXPRO	MX Processor	1	14	0	0	457.14	0	20.00	0.00	Sng			<input checked="" type="checkbox"/>
SUBW	Subwoofer	2	0	2	2	0.00	0	0.00	0.00	Sng			<input checked="" type="checkbox"/>

Audit Trail

The booking audit trail will show when Optimal Project Equipment Report was run or reversed

Report Display - Audit Trail

Page : 2 of 2

Printed : 01/31/22 Audit Trail for Booking WCAUD00010 Page : 2

Date	Time	Action	By Operator	Invoice #	Value	Booking No	Status
11/30/21	12:09	Custom Invoice Generated.	RP	24	\$ 1,632.85	WCAUD00010	Confirmed
11/30/21	12:13	Custom Invoice Generated.	RP	24	\$ 2,939.13	WCAUD00010	Confirmed
11/30/21	12:18	Booking saved with value exceeding customer credit limit.	OFFICE ADMIN		\$ 16,328.50	WCAUD00010	Confirmed
11/30/21	12:18	Modified	OFFICE ADMIN		\$ 16,328.50	WCAUD00010	Confirmed
11/30/21	17:17	Booking saved with value exceeding customer credit limit.	OFFICE ADMIN		\$ 16,328.50	WCAUD00010	Confirmed
11/30/21	17:17	Modified	OFFICE ADMIN		\$ 16,328.50	WCAUD00010	Confirmed
11/30/21	17:19	Booking saved with value exceeding customer credit limit.	OFFICE ADMIN		\$ 16,328.50	WCAUD00010	Confirmed
11/30/21	17:19	Modified	OFFICE ADMIN		\$ 16,328.50	WCAUD00010	Confirmed
12/01/21	16:25	Custom Invoice Generated.	RP	24	\$ 3,265.70	WCAUD00010	Confirmed
12/01/21	16:33	Custom Invoice Generated.	RP	24	\$ 4,898.55	WCAUD00010	Confirmed
12/01/21	16:39	Modified	RP		\$ 16,215.50	WCAUD00010	Confirmed
12/01/21	16:49	Credit Generated	RP	24	\$ 4,898.55	WCAUD00010	Confirmed
12/01/21	16:49	Custom Invoice Generated.	RP	25	\$ 12,161.62	WCAUD00010	Confirmed
12/01/21	17:01	Custom Invoice Generated.	RP	25	\$ 4,864.65	WCAUD00010	Confirmed
12/02/21	10:12	Admin lock removed.	RP			WCAUD00010	
12/02/21	10:12	Non-admin locks removed	RP			WCAUD00010	
12/13/21	13:06	Modified	RP		\$ 16,215.50	WCAUD00010	Confirmed
12/16/21	12:36	Standard Invoice Printed.	RP	30	\$ 593.25	WCAUD00010	Confirmed
12/16/21	12:36	Standard Invoice Generated.	RP	30	\$ 593.25	WCAUD00010	Confirmed
12/16/21	12:57	Modified	RP	30	\$ 904.00	WCAUD00010	Confirmed
12/16/21	13:00	Modified	RP	30	\$ 734.50	WCAUD00010	Confirmed
01/05/22	13:55	Modified	RP	30	\$ 983.10	WCAUD00010	Confirmed
01/05/22	14:08	Modified	RP	30	\$ 1,830.60	WCAUD00010	Confirmed
01/31/22	13:34	Modified	RP	30	\$ 1,378.60	WCAUD00010	Confirmed
01/31/22	13:34	Days using modified.	RP	30	\$ 1,378.60	WCAUD00010	Confirmed
01/31/22	13:34	Apply optimal project equipment	RP			WCAUD00010	Confirmed
01/31/22	13:36	Undo optimal project equipment	RP			WCAUD00010	Confirmed

Configure RentalPoint to use Projects

Goto Setup-->Parameters-->Operational

RentalPoint Version 11 Parameter Setup

Company Name Accounts Invoicing Custom Printing Booking Hardcopy

Pricing Setup **Operational Setup** Custom Viewing Word Processing Terminology

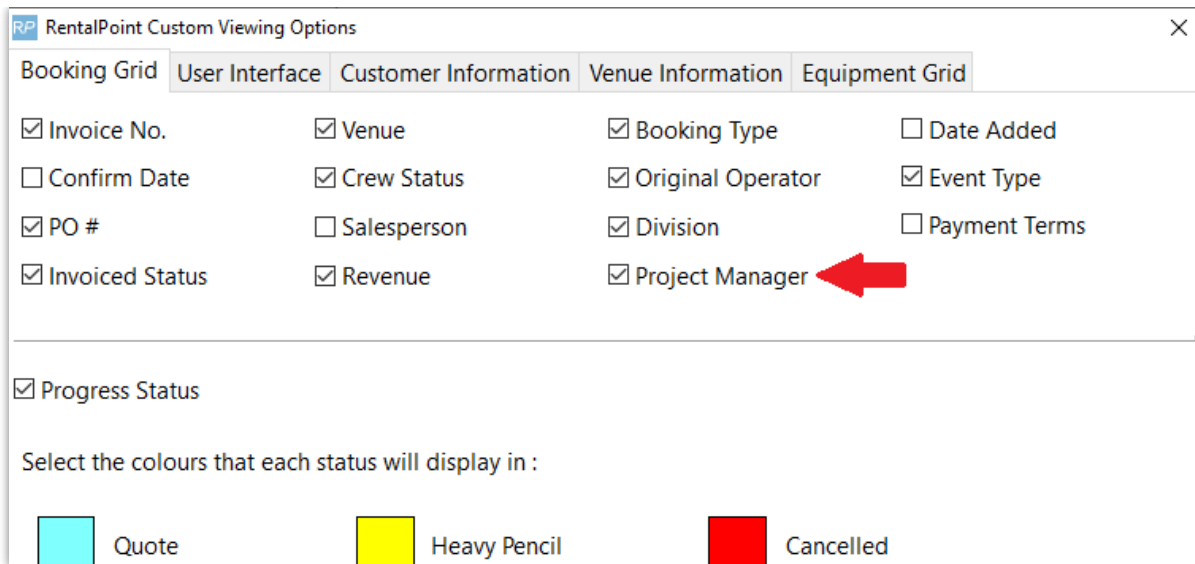
Web and Email Crew Structure Barcode Tracking Cloud Setup

Search parameters.... Find Close

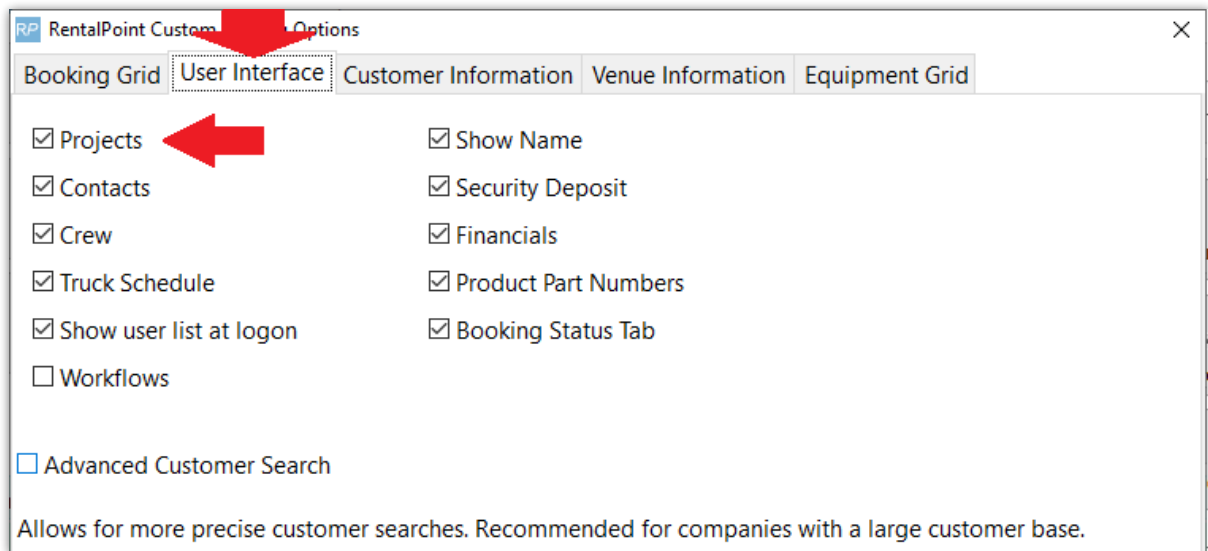
Parameter Notes

Enable Projects

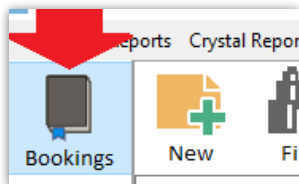
Check Project Manager



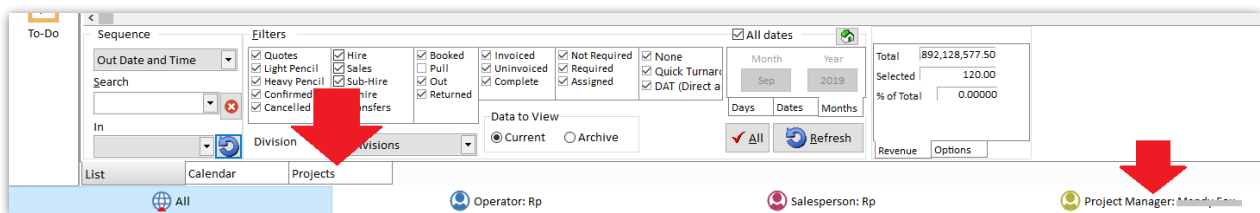
User Interface Tab-->Check Projects



Access from the Bookings Menu



Scope section



Optional Project Parameters

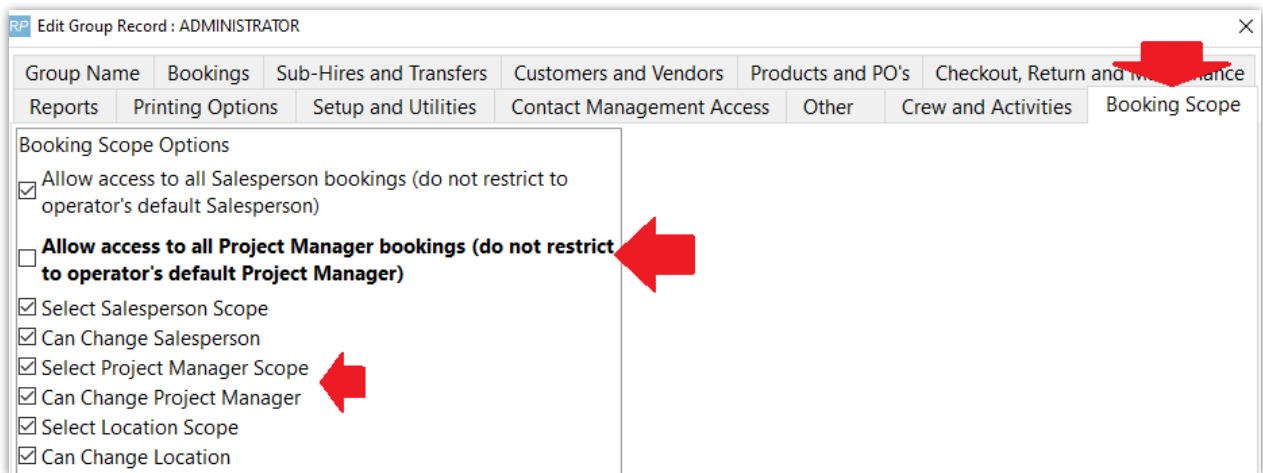
Goto Setup-->Parameters-->Operational, then set as follows:

1. Operational #116 "Use Optimal Equipment Reporting"
 1. Operational #44 "Client Facing and Warehouse Active/Mute equipment"
 2. Operational #88 "Enable Preparation Time"
2. Operational #210 'Give Weekly Rate Adjustment'
 1. Option to hide/display this field in Project Setup

** You'll need to set these first, then log out of RentalPoint and back in again before setting Operator Privileges.

Optional Project Operator Privileges

Needed for Project Manager Scope



Create/Change Project Codes

RP Edit Group Record : ADMINISTRATOR

Reports Printing Options Setup and Utilities Contact Management Access Other Crew and Activities Booking Scope

Group Name Bookings Sub-Hires and Transfers Customers and Vendors Products and PO's Checkout, Return and Maintenance

<p>General</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> New Enquiry <input checked="" type="checkbox"/> Modify a Booking <input checked="" type="checkbox"/> Place a Quote <input checked="" type="checkbox"/> Place a Light Pencil Booking <input checked="" type="checkbox"/> Place a Heavy Pencil Booking <input checked="" type="checkbox"/> Place a Confirmed Booking <input checked="" type="checkbox"/> Can Save Bookings <input checked="" type="checkbox"/> Cancel a Booking <input checked="" type="checkbox"/> Cancel a Returned Booking <input checked="" type="checkbox"/> Cancel Invoiced Booking <input checked="" type="checkbox"/> Cancel or Delete a Checked Out Booking <input checked="" type="checkbox"/> Must Enter Cancel Reason <input checked="" type="checkbox"/> Delete a Booking <input checked="" type="checkbox"/> Must Enter Delete Reason <input checked="" type="checkbox"/> Delete Invoiced Booking <input checked="" type="checkbox"/> Extend a Booking <input checked="" type="checkbox"/> Return a Booking <input checked="" type="checkbox"/> Duplicate a Booking <input checked="" type="checkbox"/> Can Set Booking Status to "Pull" <input checked="" type="checkbox"/> Can Modify Payment Contact in a Booking <input checked="" type="checkbox"/> Can Modify Payment Contact in Customer <input type="checkbox"/> Can change Customer Contact in a Booking <input checked="" type="checkbox"/> Can change workflow 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Change Booking Currency <input type="checkbox"/> Change Op Who Owns Booking <input checked="" type="checkbox"/> Modify After Invoicing <input checked="" type="checkbox"/> Change Complete Status <input checked="" type="checkbox"/> Can Confirm When Credit Limit Exceeded <input checked="" type="checkbox"/> Can Change Customer <input checked="" type="checkbox"/> Complete Status of All Bookings <input checked="" type="checkbox"/> Can Open or Duplicate Other Salesperson Bookings <hr/> <p>Equipment Tab</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Can Delete Checked Out Non-Assets <input checked="" type="checkbox"/> Can Delete Returned Items <input checked="" type="checkbox"/> Can Override Total Price <input checked="" type="checkbox"/> Can Edit Unit Rate Column <input checked="" type="checkbox"/> Can Edit Line Item Price <input checked="" type="checkbox"/> Prompt for Price Override Reason <input checked="" type="checkbox"/> Can Tag item as Backup <input checked="" type="checkbox"/> Show Monetary Figures <input checked="" type="checkbox"/> Apply Hire Discount <input checked="" type="checkbox"/> Apply Sales Discount <input checked="" type="checkbox"/> Apply Line Item Hire Discount <input checked="" type="checkbox"/> Apply Line Item Sales Discount 	<p>Equipment Tab - Continued</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Can Change Taxes <input checked="" type="checkbox"/> Can View Sales Item Costs Prices <input checked="" type="checkbox"/> Can Add Comp To Equipment List <input type="checkbox"/> Change Line Type after checkout <input checked="" type="checkbox"/> Can toggle client active/mute <input checked="" type="checkbox"/> Double click to select or unselect a line <input checked="" type="checkbox"/> Can toggle warehouse active/mute <input checked="" type="checkbox"/> Can entry Sundry Items <hr/> <p>Others Tab</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Can Add New Event Types <input checked="" type="checkbox"/> Can Change 'Return To' Location <input checked="" type="checkbox"/> Can Change Project Code After Booking is Invoiced <hr/> <p>Payment Tab</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Access to the Payments Tab <input type="checkbox"/> Can Change Payment Method <hr/> <p>Main Booking Screen</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create New Project <input checked="" type="checkbox"/> Show Revenue in Booking Grid <input checked="" type="checkbox"/> Able to View ALL Dates
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Project Return <more information>

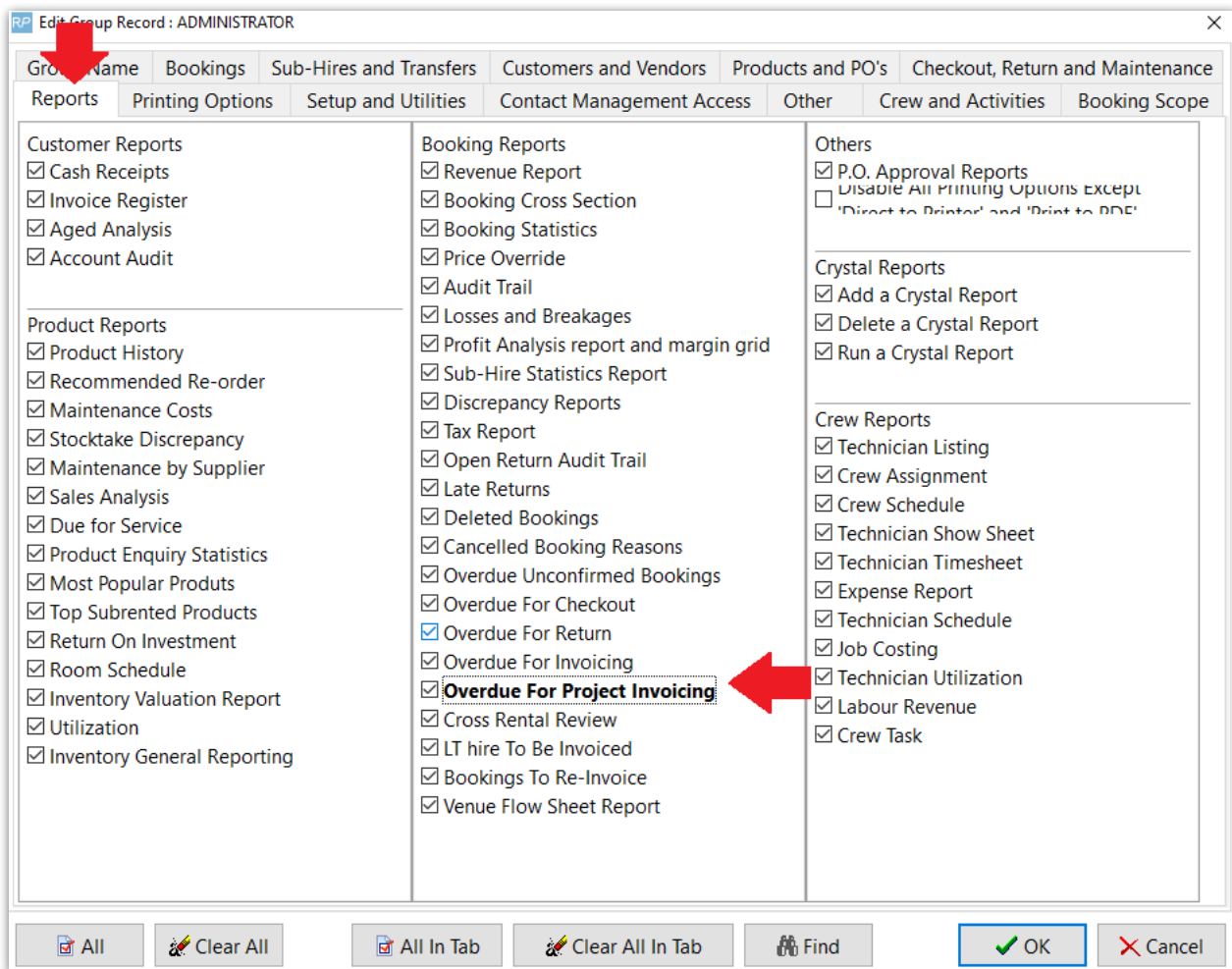
RP Edit Group Record : ADMINISTRATOR

Reports Printing Options Setup and Utilities Contact Management Access Other Crew and Activities Booking Scope

Group Name Bookings Sub-Hires and Transfers Customers and Vendors Products and PO's Checkout, Return and Maintenance

<p>Checkout / Return</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Late Returns <input checked="" type="checkbox"/> Can Checkout Short Items (only available with Op #6) <input checked="" type="checkbox"/> Enter Losses and Breakages <input checked="" type="checkbox"/> Move Items To / From Cross Rent Grid <input checked="" type="checkbox"/> Checkout Equipment <input checked="" type="checkbox"/> Can Return Unused Equipment <input checked="" type="checkbox"/> Change IN / OUT Dates After Return <input checked="" type="checkbox"/> Can Final Return a Booking <input checked="" type="checkbox"/> Can Final Checkout a Booking <input checked="" type="checkbox"/> Direct Asset Transfer <input checked="" type="checkbox"/> Return Sales Items <input checked="" type="checkbox"/> Can Use Select All in Checkout / Return <input checked="" type="checkbox"/> Final Checkout / Return When There Are Still Items Out <input checked="" type="checkbox"/> Can Checkout Assets Before It Is Returned <input checked="" type="checkbox"/> Can Undo Checkout (Entire Booking) <input checked="" type="checkbox"/> Can Undo Checkout (Selected items) <input type="checkbox"/> Can Use Open Return and Project Return <input checked="" type="checkbox"/> Resolve Discrepancy <input checked="" type="checkbox"/> Reserve Assets <input checked="" type="checkbox"/> Auto Checkout/Return From File <input checked="" type="checkbox"/> Can Checkout New <input type="checkbox"/> Can use RFID scanner 	<p>Maintenance</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Enter Maintenance Costs <input checked="" type="checkbox"/> Manually Enter Asset Test Results <input checked="" type="checkbox"/> Allow Checkout of Assets Temporarily Out of Service <input checked="" type="checkbox"/> Can Return Items From Booking Directly Into Maintenance <input checked="" type="checkbox"/> Allow Assets to be set to permanently out of service <hr/> <p>Roadcases / Racks</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Pack Roadcase <input checked="" type="checkbox"/> Unpack Roadcase <hr/> <p>Other</p> <ul style="list-style-type: none"> <input type="checkbox"/> Must Login to Restricted Areas
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Reminder for Projects Overdue for Invoicing [<more information>](#)



Needed if using Optimal Equipment [<more information>](#)

