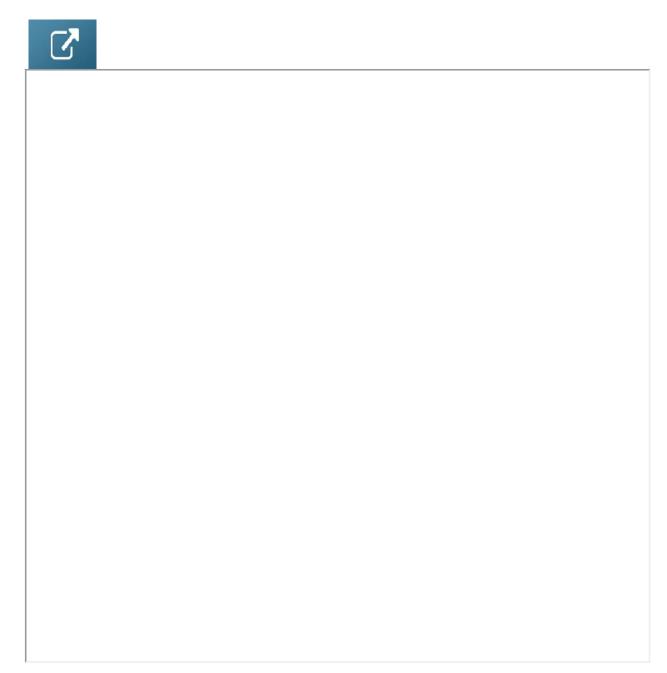


# Projects



# **Returning Projects**



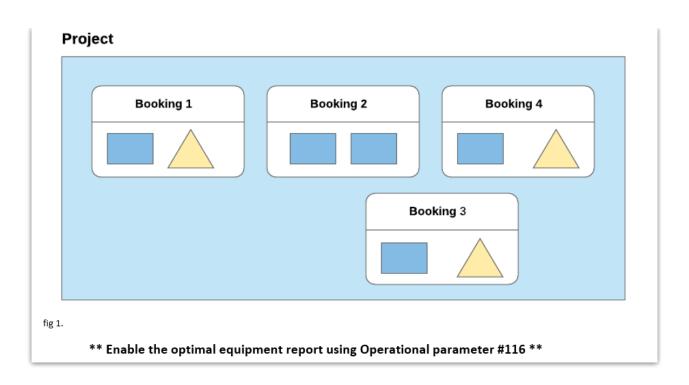
## **Optimal Equipment for Projects**

## 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.



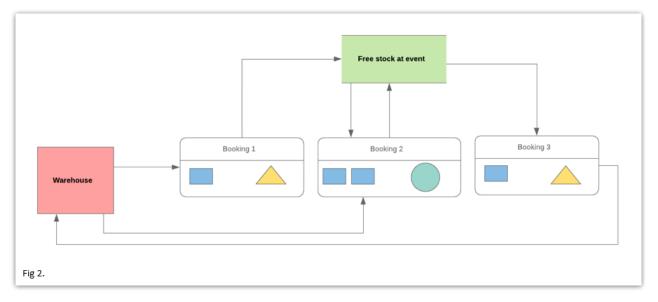
## How is optimal equipment calculated?

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 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:

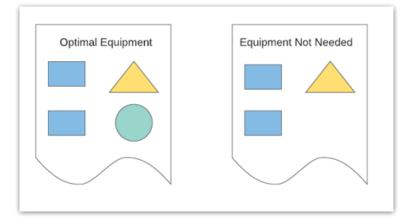
In the example below, the booking dates do not overlap each other so the second and third bookings can use some or all stock from the preceding booking.



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.

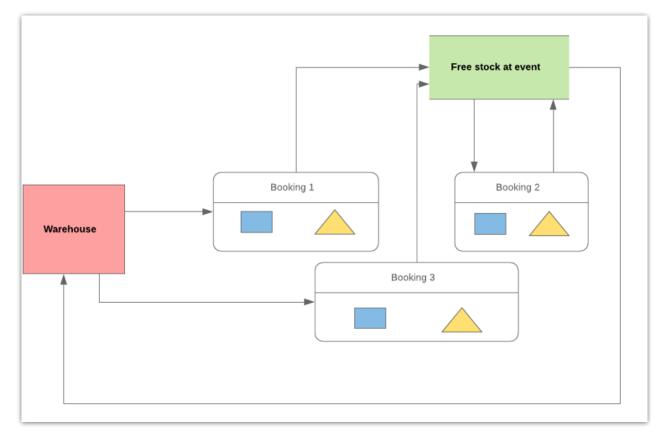
In this case, four of the items from the bookings are needed while one item from booking 2 and both from booking 3 are unneeded.

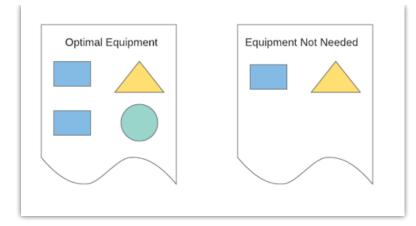


#### Example 2:

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 <u>actually</u> 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
- 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.

Reports	Printing Option	ns Setup and Utilit	ties	Contact Management Acc	ess	Other	Crew and Activities	Booking Scope
Group Nam	e Bookings	Sub rentals and Tran	nsfers	Customers and Vendors	Produ	ucts and P	O's Checkout, Return	and Maintenance
☑ Place a H	Booking Quote ight Pencil Book leavy Pencil Book onfirmed Book Bookings	oking		hange Op Who Owns Book Modify After Invoicing hange Complete Status an Confirm When Credit Lir xceeded an Change Customer complete Status of All Book an Open or Duplicate Othe alesperson Bookings	nit		pment Tab - Continued an Change Taxes an View Sales Item Cos an Add Comp To Equip hange Line Type after o an toggle client active, ouble click to select or an toggle warehouse a an entry Sundry Items	ts Prices oment List checkout 'mute unselect a line

# 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

RP		Project	X
Project Schedule Ver	nue Notes		
Project Code	WOWGALA	Salesperson	•
Project Description	WOW Gala	Coordinator	•
Expected Attendees	0	Rental Discount Rate	0.00
Festival / Use Optin	nal Equipment	Sales Discount Rate	0.00

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.

RP	Project		X
Project Schedule Venue	Notes		
Prep Start Date	06/02/22 Time 0800	Days Using	12
Warehouse Out Date	06/03/22		
Show Starting Date	06/03/22 Time 0700		
Show Ending Date	06/13/22 후 📰 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

12								Modify	booking								- 0 <b>-</b>
Out 06/03/22	0800 In 06/14/22 1	1600 WOW	AUDO	00002 Region 0 - E	AST • Locati	ion 0 - Main	•									🖌 Sa	/e 🗶 Cancel
Customer	Calendar	Equipment	Crev	v Venue	Notes	Payments	Attachments	Other Deta	ails Status	Ch	eck List	Follow	ip				
Þ	S (	<b>1</b>	9			12 <sup>C</sup>	*									י 🗣 🖗 🖄	Seq # 0:1.1.0 Parent :, Leve
0		>		Code	Description				Quantity	Avail	Short 1	Sub Rental	Unit Rate	Days	%disc	Price Stat	Prep/De- C W
P-Rent	al Equipment			SAM60	60" Samsung LED To	ouchscreen		=	1 🕂							500.00 Sng	⊻ ⊻
Sales	and Disposables			SAMTVREM	Samsung TV Remot	e			1	19	0	0	0.00	1	0.00	0.00 prt	
				TVBRAK	TV Adjustable Wall	Bracket			1	14	0	0	0.00	1	0.00	0.00 prt	
			V		Breakout Session 1	Days : 12								12		head	
				BP51	Sigma BP-51 Lithiur	m-Ion Battery Pac	k 7.2V 1200mAh		1	0	1	1	500.00	7	0.00	1,500.00 Sng	<b>v v</b>
			Ŧ	ALTS315	Alto TS315 Speaker				1	0	1	1	75.00	7	0.00	225.00 Sng	¥ ¥
			۰	SIGFP	Sigma fp L Mirrorle	ss Digital Camera			1	0	1	1	500.00	7	0.00	1,500.00 Sng	•
			V		Breakout Session 2	2 Days : 12								12		head	
			Ξ	RCFNX15	RF 15 Floor Standing	g Speaker			1	2	0	0	80.00	7	0.00	240.00 Sng	<b>v v</b>
				NX15CASE	RCF NX15 Speaker 0	CASE			1	11	0	0	0.00	7	0.00	0.00 prt	
				NX1510	NX15 10' Cable				1	97	0	0	50.00	7	0.00	150.00 prt	
																Warehou	ise active/mute

### Booking 2

							Modify bo	oking									- 0	
Out 06/03/22 0900 In 06/06/22 1930	WOWAU	DO0005 Reg	gion 0 - EAST	- Location	0 - Main	-										Save	🗙 Car	nce
ustomer Calendar Equipmen	it C	irew	Venue	Notes	Payments	Attachments	Other Details	Status	Ch	eck List	Follow up							
	11	G			12 <sup>e</sup>	*										w 🖲 C	Seq #	• 1:
۹,	×	Code	Des	scription				Quantity	Avail	Short 'Su	b Rental	Unit Rate	Days	%disc	Price S	tat P	rep/De- C	w
P		8	Bre	akout Session 1	Days : 4											eading		
Sales and Disposables		ALTS315	Alto	o TS315 Speaker				6	3	3	3	75.00	7	0.00	1,350.00 S	ng		
		T\$315CA9	5 Alto	o TS315 Speaker C	ASE			3	2	1	1	0.00	7	0.00	0.00 p	rt		
		TS315CAE	3 TS3	15 10' Cable				6	8	0	0	0.00	7	0.00	0.00 p	rt		
		B SIGFP	Sig	ma fp L Mirrorless	Digital Camera			6	4	2	2	500.00	7	0.00	9,000.00 S	ng	2	
		EVF11	Sig	ma EVF-11 Electro	nic Viewfinder			6	4	2	2	500.00	7	0.00	9,000.00 p	rt		
		BP51	Sig	ma BP-51 Lithium-	Ion Battery Pack	7.2V 1200mAh		6	3	3	3	500.00	7	0.00	9,000.00 p	rt		
		STRAPH	2 x	Sigma Strap Hold	er for fp Camera			6	9	0	0	500.00	7	0.00	9,000.00 p	rt		
		SIGHU	Sig	ma HU-11 Hot Sho	e Unit			6	4	2	2	500.00	7	0.00	9,000.00 p	rt		
		SIGBCAP	Sig	ma LCT II-TL Body	Сар			6	4	2	2	500.00	7	0.00	9,000.00 p	rt		
		SIGADAP	Sig	ma UAC-21 USB A	C Adapter			6	4	2	2	500.00	7	0.00	9,000.00 p	rt		
		SIGCAB	Sig	ma SUC-41 USB Ca	ble			6	9	0	0	500.00	7	0.00	9,000.00 p	rt		
		V	Bre	akout Session 2	Days : 4								4		h	eading		
		B RCFNX15	RF	15 Floor Standing	Speaker			1	2	0	0	80.00	7	0.00	240.00 S	ng		
		NX15CAS	E RCF	NX15 Speaker CA	SE			1	11	0	0	0.00	7	0.00	0.00 p	rt		
		NX1510	NX	15 10' Cable				1	97	0	0	50.00	7	0.00	150.00 p	rt		
reeview Search		B SAM60	60"	Samsung LED Tou	chscreen			1	13	0	0	500.00	7	0.00	1,500.00 S	ng	2	
reeview Search		SAMTVRE	M San	nsung TV Remote				1	19	0	0	0.00	7	0.00	0.00 p	rt		
😭 Comp 🚭 Add 📃 🦜 Rep		TVBRAK	TV	Adjustable Wall Br	acket			1	14	0	0	0.00	7	0.00	0.00 p	rt		~
Available Qty 1	Ir	TYDICAL										0.00	,	0.00			tive/mute	1

### Booking 3

omer Calendar Equipment	Crev	v Venue	Notes Payments	Attachments	Other De	etails Status	C	neck List	Follow up					
5e 😜 🚮	3			*									w 🖷	Seq
>		Code	Description			Quantity	Avail	Short 'Sub	Rental	Unit Rate	Days	%disc	Price Stat	Prep/De- C
Rental Equipment	8		Breakout Room 1 Days : 5								5		heading	
Sales and Disposables		SOUPAC	Basic Sound System			1	See	List	0	800.00	0	0.00	0.00 PAK	2
			test cost:500.00										750.00 sund	
	E	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	6
		TS315CAB	TS315 10' Cable			1	4	0	0	114.32	0	0.00	0.00 prt	5
		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	
	V		Breakout Room 2 Days : 5								5		heading	
	Ξ	SOUPAC	Basic Sound System			1	See	List	0	800.00	0	0.00	0.00 PAK	
	Ξ	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	5
		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	

### Running the Optimal Equipment Report

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

⊿ <b>₽</b>	ojects			
⊿/	WOWGALA - WOW Gala - 6/3/2022 to 6/13/2		1	_
	WOWAUD00002 [CO] - WOW Audio & Events [Wow A	n 🖡	New	
		6	New Project	
	u 📕 WOWAUD00005 [CO] - WOW Audio & Events [Wow A	ni 🚞	Open Project	
	C:\myrp\docs\Invoices\WOWAUD-00005I-V001.RT	. 🚬	Delete Project	
		ß	Print Project Quote	
	WOWAUD00010 [CO] - WOW Audio & Events [Birthda	۷ 🗎	Print Project Invoice	
	NO PO	A	Batch Print Invoices	
		A	Batch Print Delivery Sheets / Collection Dockets	
		B	Calculate Optimal Equipment	1
			View Project Requirements	L

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.



Booking No.	Out Date	Heading	Not Needed	Already Out	Product code	Product Description
NOWAUD00010	06/07/22	Breakout Room 1	1	0	ALTS315	Alto TS315 Speaker
NOWAUD00010	06/07/22	Breakout Room 2	1	0	ALTS315	Alto TS315 Speaker
NOWAUD00010	06/07/22	Breakout Room 1	1	0	NX1510	NX15 10' Cable
VOWAUD00010	06/07/22	Breakout Room 1	1	0	TS315CAB	TS315 10' Cable
VOWAUD00010	06/07/22	Breakout Room 2	1	0	TS315CAB	TS315 10' Cable
NOWAUD00010	06/07/22	Breakout Room 2	1	0	TS315CAS	Alto TS315 Speaker CASE
WOWAUD00010	06/07/22	Breakout Room 1	1	0	TS315CAS	Alto TS315 Speaker CASE

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).

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		7	SICED	Sigma to L Mirrorlass Digital Camora

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

<b>⊟ ਨਾ</b> ੋਾ ∓					Optimal E	quipment fo	r WOWGAI	A Printed 31.	.1.2022-1341.	CSV - Excel	
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	OVGALA WOW Gala				-						_
· · · ·	v Annual Gala 2022 W			lav Party							
Show hance? Wo		on Annuar	Guid 2022 Dirtin	ay rang							
Optimal Equipme	nt Needed										
optimar Equipmen	in Necesco										
Group code	Group Description	Noodod	Product code	Product Description							
AUDIO	AUDIO		SOUPAC	Basic Sound System							
AUDIO	AUDIO	_	MXPRO	MX Processor							
AUDIO	AUDIO		SUBW	Subwoofer							
AUDIO	AUDIO				otor						
-			SIGADAP	Sigma UAC-21 USB AC Ada	pter						
AUDIO	AUDIO		ALTS315	Alto TS315 Speaker							
AUDIO	AUDIO		RCFNX15	RF 15 Floor Standing Spea	ker						
AUDIO	AUDIO		NX1510	NX15 10' Cable							
AUDIO	AUDIO		TS315CAB	TS315 10' Cable							
5 AUDIO	AUDIO		TS315CAS	Alto TS315 Speaker CASE							
5 AUDIO	AUDIO		NX15CASE	RCF NX15 Speaker CASE							
7 VIDEO	VIDEO		SIGBCAP	Sigma LCT II-TL Body Cap							
3 VIDEO	VIDEO		SIGHU	Sigma HU-11 Hot Shoe Un							
VIDEO	VIDEO	7	STRAPH	2 x Sigma Strap Holder for	fp Camera						
VIDEO	VIDEO	8	BP51	Sigma BP-51 Lithium-Ion E	attery Pack 7.2V	/ 1200mAh					
VIDEO	VIDEO	7	EVF11	Sigma EVF-11 Electronic V	iewfinder						
VIDEO	VIDEO	7	SIGCAB	Sigma SUC-41 USB Cable							
VIDEO	VIDEO	7	SIGFP	Sigma fp L Mirrorless Digit	al Camera						
VIDEO	VIDEO	2	SAMTVREM	Samsung TV Remote							
VIDEO	VIDEO	2	SAM60	60" Samsung LED Touchscr	een						
VIDEO	VIDEO	2	TVBRAK	TV Adjustable Wall Bracke	t						
7											
Equipment not ne	eded (Equipment to b	e eliminate	ed / does not ne	ed to be picked)							
)											
Booking No.	Out Date	Heading	Not Needed	Already Out				Product cod	de l	Product Description	
WOWAUD00010	06/07/22	Breakout	1				0	ALTS315		Alto TS315 Speaker	
WOWAUD00010	06/07/22	Breakout	1					ALTS315		Alto TS315 Speaker	
WOWAUD00010	06/07/22	Breakout	1				0	NX1510		NX15 10' Cable	
WOWAUD00010	06/07/22	Breakout	1					TS315CAB		TS315 10' Cable	
WOWAUD00010	06/07/22	Breakout	1					TS315CAB		TS315 10' Cable	
WOWAUD00010	06/07/22	Breakout	1					TS315CAS		Alto TS315 Speaker CA	SE
	mal Equipment for W		-	1			•			oo to op cance on	

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.

						Modi	fy booking								- 0
2 0700 In 06/11/22 1900 WOW	AUDO	0010 Region 0 - 1	EAST - Locatio	n 0 - Main	-									🗸 Save	🗶 Can
Calendar Equipment	Crew	v Venue	Notes	Payments	Attachments	Other D	etails Status	C	heck List	Follow	qt				
) 💴 🖌	9			15th	*									<b>"</b> "	Seq #
>	<	Code	Description				Quantity	Avail	Short	Sub Rental	Unit Rate	Days	%disc	Price Stat	Prep/De- C V
tal Equipment	N 1		Breakout Room 1	Days : 5								5		heading	
es and Disposables		SOUPAC	Basic Sound System				1	See	List	0	800.00	0	0.00	0.00 PAK	<b>v</b>
			test cost:500.00											750.00 sund	<b>v</b>
		ALTS315	Alto TS315 Speaker				1	WMute		0	228.56	0	0.00	0.00 prt	2
		TS315CAS	Alto TS315 Speaker C	ASE			1	WMute		0	0.00	0	0.00	0.00 prt	2
		TS315CAB	TS315 10' Cable				1	WMute		0	114.32	0	0.00	0.00 prt	
		NX1510	NX15 10' Cable				1	WMute		0	50.00	0	0.00	0.00 prt	2
		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	2
	V			Days : 5								5		heading	
		SOUPAC	Basic Sound System				1	See	List	0	800.00	0	0.00	0.00 PAK	2
		ALTS315	Alto TS315 Speaker				1	WMute		0	0.00	0	0.00	0.00 prt	
		TS315CAS	Alto TS315 Speaker C	ASE			1	WMute		0	0.00	0	0.00	0.00 prt	
		TS315CAB	TS315 10' Cable				1	WMute		0	0.00	0	0.00	0.00 prt	2
		NX1510	NX15 10' Cable				1	98	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	2
earch	-	SUBW	Subwoofer				2	0	2	2	0.00	0	0.00	0.00 Sng	

### 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



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

Booking No.	Out Date	Heading	Not Needed	Already Out	Product code	Product Description
VOWAUD00010	06/07/22	Breakout Room 1	1	0	ALTS315	Alto TS315 Speaker
VOWAUD00010	06/07/22	Breakout Room 2	1	0	ALTS315	Alto TS315 Speaker
VOWAUD00010	06/07/22	Breakout Room 1	1	0	NX1510	NX15 10' Cable
VOWAUD00010	06/07/22	Breakout Room 1	1	0	TS315CAB	TS315 10' Cable
VOWAUD00010	06/07/22	Breakout Room 2	1	0	TS315CAB	TS315 10' Cable
000000000000000000000000000000000000000						
VOWAUD00010	06/07/22	Breakout Room 2	1	0	TS315CAS	Alto TS315 Speaker CASE
VOWAUD00010 VOWAUD00010	06/07/22 06/07/22	UNDO Optimal Equ project as NEEDED	7 Confirr ipment for Project will	n		× Speaker CASE
		UNDO Optimal Equ project as NEEDED	ipment for Project will optimal equipment?	n mark all gear i		× Speaker CASE
		UNDO Optimal Equ project as NEEDED	ipment for Project will	n		× Speaker CASE
		UNDO Optimal Equ project as NEEDED	ipment for Project will optimal equipment?	n mark all gear i		× Speaker CASE
WOWAUD00010	06/07/22	UNDO Optimal Equ project as NEEDED	ipment for Project will optimal equipment? Yes	n mark all gear i	for all bookings in	× Speaker CASE
VOWAUD00010	06/07/22	UNDO Optimal Equ project as NEEDED Proceed with undo	ipment for Project will optimal equipment? Yes	n mark all gear i	for all bookings in	× Speaker CASE

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

Crew	/ Venue	Notes	Payments	Attachments	Other Deta	ils Status	C	heck List	Follow up					
			12 <sup>c</sup>	*									un a	9 🕵 👌
	Code	Description		-		Quantity	Avail	Short *	Sub Rental	Unit Rate	Days	%disc	Price Stat	Prep/De- C
V		Breakout Room 1	Days : 5								5		headin	, C
	SOUPAC	Basic Sound System	n			1	See	List	0	800.00	0	0.00	0.00 PAK	5
		test cost:500.00											750.00 sund	5
Ξ	ALTS315	Alto TS315 Speaker				1	0	1	1	228.56	0	0.00	0.00 prt	5
	TS315CAS	Alto TS315 Speaker	CASE			1	1	0	0	0.00	0	0.00	0.00 prt	5
	TS315CAB	TS315 10' Cable				1	4	0	0	114.32	0	0.00	0.00 prt	5
	NX1510	NX15 10' Cable				1	98	0	0	50.00	0	0.00	0.00 prt	5
	MXPRO	MX Processor				1	15	0	0	457.12	0	0.00	0.00 prt	5
	SUBW	Subwoofer				2	0	2	2	0.00	0	0.00	0.00 Sng	5
Ÿ		Breakout Room 2	Days : 5								5		headin	
۲	SOUPAC	Basic Sound System	n			1	See	List	0	800.00	0	0.00	0.00 PAK	5
Ξ	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	5
	NX1510	NX15 10' Cable				1	97	0	0	0.00	0	0.00	0.00 prt	5
	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	

### Audit Trail

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

		Rep	ort Display - Audit	Trail		
$\begin{array}{c c} \leftarrow First & \leftarrow Page & Page \rightarrow & Last \rightarrow & Page : 2 \text{ of } 2 \end{array}$	📰 Go To	Print P	@ <u>E</u> mail	<u></u> <b>1</b> . ⊆I	ose	
Frinted : 01/31/22 Audit Trail for Booking WOWAUD(	00010		Page : 2			
Date Time Action		By Operator	Invoi	ce ‡	Value Booking No	Status
11/30/21 12:09 Custom Invoice Generated.		RP		24 \$	1,632.85 WCWAUD00010	Confirm
11/30/21 12:13 Custom Invoice Generated.		RP		24 \$	2,939.13 WCWAUD00010	Confirm
11/30/21 12:18 Booking saved with value exceeding customer co	redit limit.	OFFICE ADMIN		\$	16,328.50 WCWAUD00010	Confirm
11/30/21 12:18 Modified		OFFICE ADMIN		\$	16,328.50 WCWAUD00010	Confirm
11/30/21 17:17 Booking saved with value exceeding customer co	redit limit.	OFFICE ADMIN		\$	16,328.50 WCWAUD00010	Confirm
11/30/21 17:17 Modified		OFFICE ADMIN		\$	16,328.50 WCWAUD00010	Confirm
11/30/21 17:19 Booking saved with value exceeding customer co	redit limit.	OFFICE ADMIN		\$	16,328.50 WCWAUD00010	Confirm
11/30/21 17:19 Modified		OFFICE ADMIN		\$	16,328.50 WCWAUD00010	Confirm
12/01/21 16:25 Custom Invoice Generated.		RP		24 \$	3,265.70 WCWAUD00010	Confirm
12/01/21 16:33 Custom Invoice Generated.		RP		24 \$	4,898.55 WCWAUD00010	Confirm
12/01/21 16:39 Modified		RP		\$	16,215.50 WCWAUD00010	Confirm
12/01/21 16:49 Credit Generated		RP		24 \$	4,898.55 WCWAUD00010	Confirm
12/01/21 16:49 Custom Invoice Generated.		RP		25 \$	12,161.62 WCWAUD00010	Confirm
12/01/21 17:01 Custom Invoice Generated.		RP		25 \$	4,864.65 WCWAUD00010	Confirm
12/02/21 10:12 Admin lock removed.		RP			WCWAUD00010	
12/02/21 10:12 Non-admin locks removed		RP			WCWAUD00010	
12/13/21 13:06 Modified		RP		ş	16,215.50 WCWAUD00010	Confirm
12/16/21 12:36 Standard Invoice Printed.		RP		30 \$	593.25 WCWAUD00010	Confirm
12/16/21 12:36 Standard Invoice Generated.		RP		30 \$	593.25 WCWAUD00010	Confirm
12/16/21 12:57 Modified		RP		30 \$	904.00 WCWAUD00010	Confirm
12/16/21 13:00 Modified		RP		30 \$	734.50 WCWAUD00010	Confirm
01/05/22 13:55 Modified		RP		30 \$	983.10 WCWAUD00010	Confirm
01/05/22 14:08 Modified		RP		30 \$	1,830.60 WCWAUD00010	Confirm
01/31/22 13:34 Modified		RP		30 \$	1,378.60 WCWAUD00010	Confirm
01/31/22 13:34 Days using modified.		RP		30 \$	1,378.60 WCWAUD00010	Confirm
01/31/22 13:34 Apply optimal project equipment		RP			WCWAUD00010	Confirm
01/31/22 13:36 Undo optimal project equipment		RP			WCWAUD00010	Confir

# Configure RentalPoint to use Projects

Goto Setup-->Parameters-->Operational

RentalPoint Version 11 Pa	rameter Setup			– 🗆 X
Company Name	Accounts	Invoicing	Custom Printing	کی Booking Hardcopy
Pricing Setup	Operational Setup	Custom Viewing	Word Processing	Terminology
Carlor Web and Email		Crew Structure	Barcode Tracking	Cloud Setup
	Sea neters		🔎 Find	<u>I</u> <u>C</u> lose
Parameter Notes				
				^

### **Enable Projects**

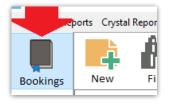
Check Project Manager

RentalPoint Cu	stom Viewing Opti	ons			×
Booking Grid	User Interface	Customer Information	Venue Information	Equipment Grid	
Invoice No.	$\sim$	Venue	🗹 Booking Type	🗆 Date	Added
Confirm Da	te 🖂	Crew Status	🗹 Original Opera	tor 🗹 Even	t Type
✓ PO #		] Salesperson	✓ Division	🗆 Payn	nent Terms
Invoiced Sta	atus 🖂	Revenue	✓ Project Manage	er 🔶	
☑ Progress Sta	tus				
Select the cold	ours that each s	tatus will display in :			
Quote	e	Heavy Pencil		Cancelled	

#### User Interface Tab-->Check Projects

RentalPoint Custom		×
Booking Grid User Interface Custo	omer Information Venue Information Equipment Grid	
Projects	☑ Show Name	
☑ Contacts	☑ Security Deposit	
☑ Crew	☑ Financials	
☑ Truck Schedule	☑ Product Part Numbers	
☑ Show user list at logon	☑ Booking Status Tab	
□ Workflows		
Advanced Customer Search		
Allows for more precise customer se	arches. Recommended for companies with a large customer base.	

## Access from the Bookings Menu



#### Scope section

To-Do Sequence	<u>F</u> ilters						🗹 All da	ates	<b>S</b>		
Out Date and Time Search In	Light Pencil Heavy Pencil Confirmed	Hire Sales Sub-Hire Insfers	Pull		Assigned	☑ None ☑ Quick Turnaro ☑ DAT (Direct a	Sep	Dates	Year 2019 Months Refresh	Total         892,128,577.50           Selected         120.00           % of Total         0.00000           Revenue         Options	_
List Calen		s		Operator: Rp			(	Sale	sperson: F		Project Manager:

# **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

RP Edit Group F	ecord : ADMINISTR	ATOR							×
Group Nam	e Bookings	Sub-Hires an	d Transfers	and Vendors	Proc	ducts and PO	s Checkout, Return	and me hance	
Reports	Printing Option	ns Setup an	d Utilities	Contact Mar	nagement Ac	cess	Crew and Activities Booking Scope		
Booking Sco	ope Options				]				
Allow acc operator	ess to all Sales s default Salesp	person bookin <u>o</u> person)	gs (do not res	trict to					
	cess to all Proje tor's default Pr	-		not restrict					
	lesperson Scope								
🗹 Can Chan	ge Salesperson								
Select Pro	oject Manager S	Scope							
🗹 Can Chan	ge Project Man	ager							
Select Lo	cation Scope								
🗹 Can Chan	ge Location								

Create/Change Project Codes

Reports Printic ons Setup and Utilit	ties Contact Management Access 0	Other Crew and Activities Booking Scope			
Group Name Bookings Sub-Hires and Tran	sfers Customers and Vendors Produc	cts and PO's Checkout, Return and Maintenance			
General	Change Booking Currency	Equipment Tab - Continued			
<ul> <li>New Enquiry</li> <li>Modify a Booking</li> <li>Place a Quote</li> <li>Place a Light Pencil Booking</li> <li>Place a Heavy Pencil Booking</li> <li>Place a Confirmed Booking</li> <li>Can Save Bookings</li> <li>Cancel a Booking</li> </ul>	<ul> <li>Change Op Wile Owns booking</li> <li>Modify After Invoicing</li> <li>Change Complete Status</li> <li>Can Confirm When Credit Limit Exceeded</li> <li>Can Change Customer</li> <li>Complete Status of All Bookings</li> <li>Can Open or Duplicate Other Salesperson Bookings</li> </ul>	<ul> <li>Can Change Taxes</li> <li>Can View Sales Item Costs Prices</li> <li>Can Add Comp To Equipment List</li> <li>Change Line Type after checkout</li> <li>Can toggle client active/mute</li> <li>Double click to select or unselect a line</li> <li>Can toggle warehouse active/mute</li> <li>Can entry Sundry Items</li> </ul>			
<ul> <li>Cancel a Returned Booking</li> <li>Cancel Invoiced Booking</li> <li>Cancel or Delete a Checked Out Booking</li> <li>Must Enter Cancel Reason</li> <li>Delete a Booking</li> <li>Must Enter Delete Reason</li> <li>Delete Invoiced Booking</li> </ul>	Equipment Tab Can Delete Checked Out Non-Assets Can Delete Returned Items Can Override Total Price Can Edit Unit Rate Column Can Edit Unit Rate Column	Others Tab Can Add New Event Types Can Change 'Return To' Location Can Change Project Code After Booking is Invoiced			
<ul> <li>Delete involced Booking</li> <li>Extend a Booking</li> <li>Return a Booking</li> <li>Duplicate a Booking</li> <li>Can Set Booking Status to "Pull"</li> <li>Can Modify Payment Contact in a Booking</li> <li>Can Modify Payment Contact in Customer</li> <li>Can change Customer Contact in a Booking</li> <li>Can change workflow</li> </ul>	<ul> <li>Can Edit Line Item Price</li> <li>Prompt for Price Override Reason</li> <li>Can Tag item as Backup</li> <li>Show Monetary Figures</li> <li>Apply Hire Discount</li> <li>Apply Sales Discount</li> <li>Apply Line Item Hire Discount</li> <li>Apply Line Item Sales Discount</li> </ul>	Payment Tab ✓ Access to the Payments Tab Can Change Payment Method Main Booking Screen ✓ Create New Project ✓ Show Revenue in Booking Grid ✓ Able to View ALL Dates			

### Project Return <more information>

Reports	Pri	nting Options	Setup and Utilities	Contact Management A		ess	Other	Cr	ew and	Booking Scope
Group Na	me	Bookings S	Sub-Hires and Transfers	Customers a	mers and Vendors		ducts and P	O's	Checkout, Re	eturn and Maintenance
Enter Lo      Move It      Move It      Checkor      Can Ret      Change      Can Fin      Can Fin      Direct A      Return S      Can Use      Final Che      Can Che      Can Une      Can Use      Resolve      Resolve      Reserve	turns eckou osses ems ut Eq urn L IN / al Re al Ch Asset Sales e Sele eckou do Ch do Ch e <b>Op</b> o Disc eckou	at Short Items and Breakage To / From Cro uipment Jnused Equipr OUT Dates Af turn a Booking eckout a Book Transfer Items ect All in Chec out / Return W at Assets Befor heckout (Entire heckout (Selec <b>en Return an</b> trepancy ets but/Return Fro at New	ss Rent Grid nent ter Return g sing kout / Return hen There Are Still Items re It Is Returned e Booking) ted items) <b>d Project Return</b>		Can Retur	ntena Enter eckou m Iter sets to Rack dcase oadca	Asset Test t of Assets ms From Bo b be set to p s ase	Tem ookin perm	porarily Out o ng Directly Into nanently out o	Maintenance

Gro. Name Booki	igs S	Sub-Hires	and Transfers	Customers and Vendors	Produ	ucts and PO	's Checkout, Return	and Maintenance			
Reports Printing O	otions	Setup	and Utilities	Contact Management Ac	ess	Other	Crew and Activities	Booking Scope			
Customer Reports ☑ Cash Receipts ☑ Invoice Register ☑ Aged Analysis ☑ Account Audit			☑ Rev ☑ Boo ☑ Boo ☑ Price ☑ Aud			Crystal	Others  P.O. Approval Reports  Usable All Printing Options Except  'Direct to Brinter' and 'Brint to BDE'  Crystal Reports  Add a Crystal Report				
Product Reports Product History Recommended Re-order Maintenance Costs Stocktake Discrepancy Maintenance by Supplier Sales Analysis Due for Service Product Enquiry Statistics Most Popular Produts Top Subrented Products Return On Investment Room Schedule Inventory Valuation Report Utilization Inventory General Reporting				es and Breakages it Analysis report and margi Hire Statistics Report repancy Reports Report n Return Audit Trail Returns	n grid	<ul> <li>✓ Run</li> <li>Crew R</li> <li>✓ Tech</li> <li>✓ Crew</li> </ul>	<ul> <li>☑ Delete a Crystal Report</li> <li>☑ Run a Crystal Report</li> <li>☑ Crew Reports</li> <li>☑ Technician Listing</li> <li>☑ Crew Assignment</li> <li>☑ Crew Schedule</li> </ul>				
				eted Bookings celled Booking Reasons rdue Unconfirmed Bookings rdue For Checkout rdue For Return rdue For Invoicing <b>rdue For Project Invoicing</b> s Rental Review ire To Be Invoiced kings To Re-Invoice	4	☐ Tech ☐ Expe ☐ Tech ☐ Job ☐ Tech ☐ Labo	<ul> <li>Crew Schedule</li> <li>Technician Show Sheet</li> <li>Technician Timesheet</li> <li>Expense Report</li> <li>Technician Schedule</li> <li>Job Costing</li> <li>Technician Utilization</li> <li>Labour Revenue</li> <li>Crew Task</li> </ul>				
ि All है दिस	0.11	1		ue Flow Sheet Report			Find V Cance				

### Reminder for Projects Overdue for Invoicing <more information>

### Needed if using Optimal Equipment <more information>

P Edit Group Re	ecord : ADMINISTR	ATOR								×
Reports	Printing Option	ns	Setup and Utilit	ies	s Contact Management Acce		Other	Cr	ew and Activities	Booking Scope
Group Nam	e Bookings	Sub rentals and Tran		sfers	Customers and Vendors	Pro	ducts ar	nd PO's	Checkout, Return	and Maintenance
Place a H	Booking uote ght Pencil Boo eavy Pencil Boo onfirmed Book Bookings	oking			hange Op Who Owns Book lodify After Invoicing hange Complete Status an Confirm When Credit Lin xceeded an Change Customer omplete Status of All Book an Open or Duplicate Othe alesperson Bookings	nit		2 Can C 2 Can V 2 Can A 2 Can A 2 Can to 2 Can to 2 Can to	ent Tab - Continued hange Taxes fiew Sales Item Cos add Comp To Equip ge Line Type after o oggle client active, le click to select or oggle warehouse a ntry Sundry Items	sts Prices oment List checkout /mute · unselect a line