

POs

Last Modified on 26/04/2023 4:50 pm EDT



Definitions

Cross Rental – is a rental from an outside source to temporarily supplement your own inventory.

Purchase Order – is a purchase of equipment that is to be added to your inventory permanently.

Create/Edit Purchase Orders

A purchase order in RentalPoint records the purchase of product(s) for addition to RentalPoint Inventory. If this product exists in the system then RentalPoint will automatically increment the quantity owned when the PO is received within RentalPoint.

To create a new purchase order, right click in the PO grid, then click New or use the top menu icon.

To modify an existing purchase order, right click on the PO grid, then click Open Or use the top menu icon

Details Tab

The details tab contains information about the operator and the vendor that are involved in the order. Each operator has a PO limit, which is defined in the operator properties. This prevents operators from creating POs that exceed the acceptable amount.

The Invoice Status field offers four options for recording the invoice status of a purchase order. Users would manually set the invoice status from within the Details tab of the Purchase Order.

RF Purchase Order [PO # 80]

Details Dates Equipment Delivery Address Notes Attachments

Our P.O No. 80

Description test

Invoice Status Not Invoiced

Location 0 - Toronto

Assigned to Booking

MYTEST0024

Showname df

Project

Company

Code THOMAS Vendor

Name James Thomas Engineering

Ordered By RP

Requested By

Vendor Notes

Status

Reviewed Month Year Filter

Approval

Approved

Date

By

Current Operator Max PO Amount 1000000.00

P.O. Total Price 109.00

Save Cancel

Dates Tab

The dates tab contains the delivery method and times of when equipment should be in the warehouse.

Purchase Order [PO # 80]

Details Dates **Equipment** Delivery Address Notes Attachments

Date Ordered

Equipment In
 Delivery

Other

Delivery Freight
 Our Number Their Number

Include on Truck Schedule and Delivery Return Schedule

Approval
 Approved
 Date Current Operator Max PO Amount
 By P.O. Total Price

Equipment Tab

This tab contains all the equipment that you will be purchasing. As you enter equipment into the grid RentalPoint will add up the cost from the cost price in the sales tab of the product properties.


Sub-Hire - THOMAS00016 [PO # 66]

Details Dates Equipment Delivery Address Notes Attachments

Code	Part No.	Description	Quantity	Unit Rate	Days	% Disc.	Price	GL Code
MSR100	part num	8" Powered Speaker - Yamaha MSR100	64	25.00	0.00	0.00	1600.00	

Discount %	<input type="text" value="0.00"/>	Freight	<input type="text" value="0.00"/>	Exempt	<input type="text" value="0.00"/>
Equipment	<input type="text" value="1600.00"/>	Sub Total	<input type="text" value="1600.00"/>	Exempt	<input type="text" value="0.00"/>
Crew	<input type="text" value="0.00"/>	Total Price	<input type="text" value="1600.00"/>	Currency	<input type="text"/>

Approval
 Approved
 Date Current Operator Max Sub-Hire Amount
 By P.O. Total Price

 Locked for Scanning

Delivery Address Tab

This tab stores the delivery address. This information can be filled out manually or if the PO is assigned to a booking then the system will inherit the venue address from the booking.

Sub-Hire - THOMAS00006 [PO # 32]

Details Dates Equipment Crew **Delivery Address** Notes Attachments

Drop Ship

Venue Contact

Deliver To: CN Tower

Room:

Street: 301 Front Street West

Add Line 2: line 2

City: Toronto County: ON

Country: Canada Post code: MSV 2T6

Country Code	Area Code	Number	Extension
Phone 1: <input type="text" value="1"/>	<input type="text" value="416"/>	<input type="text" value="868-6937"/>	<input type="text"/>
Fax: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Contact: Nick Migliore

Approval

Approved:

Date: 13-05-15

By: RP

Current Operator Max Sub-Hire Amount: 1000000.00

P.O. Total Price: 1425.00

Notes Tab

Any extra information pertaining to the PO can be added here.

Attachments Tab

If there are any files that you wish to attach to this PO such as any scans of documentation, they can be added into the attachments tab for later reference.

Delete a Purchase Order

Right click on the PO -->admin--> Delete.

The system will prompt you for confirmation. If confirmed the purchase order will be deleted. Note that both normal purchase orders and cross rental purchase orders are contained within the Purchase Order grid. The system will prevent the operator from removing cross rentals from the purchase order area. To delete a cross rental the operator must delete the cross rental from the bookings area.

venues	THOMAS	James Thomas Engineering	2016-05-31	66	USD 1,600.00	No
Schedule	THOMAS	James Thomas Engineering	2017-02-14	655555	USD 0.00	No
Crew Planner	THOMAS	James Thor	2017-05-24	74	USD 525.00	No
Vendors	HARMON	Harmon's Au	2016-04-25	61	USD 25.50	No
POs	HARMON	Harmon's Au	2017-04-20	73	USD 458.57	Yes
Contacts	HARMON	Harmon's Au		888888	USD 8.50	Yes
	HARMON	Harmon's Au		9998888	USD 429.25	Yes
	HARMON	Harmon's Au		72	USD 8,500.00	No
	HARMON	Harmon's Au	2017-02-13	1122121	USD 350.00	No
	HARMON	Harmon's Au	2016-06-16	68	USD 2,125.00	No
	HARMON	Harmon's Audio Visual	2015-10-20	45	USD 3,400.00	Yes
	HARMON	Harmon's Audio Visual	2015-08-20	42	USD 5,312.50	No
	HARMON	Harmon's Audio Visual	2015-06-02	40	USD 68.00	No
	HARMON	Harmon's Audio Visual	2015-04-10	25	USD 25.26	No

Duplicate a Purchase Order

To duplicate a Purchase Order or Cross Rental, right click and select Admin-> Duplicate.

All information from the previous purchase order or cross rental will be copied to a new order.

venues	THOMAS	James Thomas Engineering	2016-05-31
Schedule	THOMAS	James Thomas Engineering	2017-02-14
Crew Planner	THOMAS	James Thomas Engineering	2017-05-24
Vendors	HARMON	Harmon's Audio Visual	2016-04-25
POs	HARMON	Harmon's Audio Visual	2017-04-20
Contacts	HARMON	Harmon's Audio Visual	
	HARMON	Harmon's Audio Visual	
	HARMON	Harmon's Audio Visual	
	HARMON	Harmon's Audio Visual	
	HARMON	Harmon's Audio Visual	2017-02-13
	HARMON	Harmon's Audio Visual	2016-06-16
	HARMON	Harmon's Audio Visual	2015-10-20
	HARMON	Harmon's Audio Visual	2015-08-20

Approve a Purchase Order

There are several status levels for a purchase order:

- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.
- **Received** – the purchase order has been processed and received, equipment that was requested is now in stock.

To place a purchase order into Approved status open the purchase order and click the 'Approved' checkbox. Permissions can be set to prevent unauthorized users from approving purchase orders.

PO limits are set on a per operator basis that determine how much a given operator is allowed to order.

RP Sub rental - THOMAS00016 [PO # 66]

Details Dates Equipment Delivery Address Notes Attachments

Our P.O. No. 66

Description

Invoice Status Not Invoiced

Location 0 - Toronto [Satellite]

Division 0 - Zero

Company Code THOMAS

Name James Thomas Engineering

Ordered By RP

Requested By

Assigned to Booking MYTEST00003 Assign Unassign

Showname

Project

Vendor Notes

Confirmed/Cancelled Confirmed Cancelled

Approval Approved Date 17-09-14 By RP

Current Operator Max Sub rental Amount	1000000.00
P.O. Total Price	1600.00

Print

Locked for Scanning

Save Cancel

Receive a Purchase Order

There are several status levels for a purchase order:

- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.
- **Received** – the purchase order has been processed and received, equipment that was requested is now in stock.

To place a purchase order into Received status, the PO must first be approved and posted.

Then Right click-->work--> click Receive.

RentalPoint will increment the quantity in the system according to the quantity entered in the PO receiving window.

1	66	USD 1,600.00	Yes	Yes
4	655555	USD 0.00	No	Yes
4	74	00	No	Yes
5	61	50	No	Yes
0	73			Yes
4	888888			Yes
4	9998888			Yes
0	72	00	No	Yes
3	1122121	00	No	Yes
3	68	USD 2,123.00	No	Yes

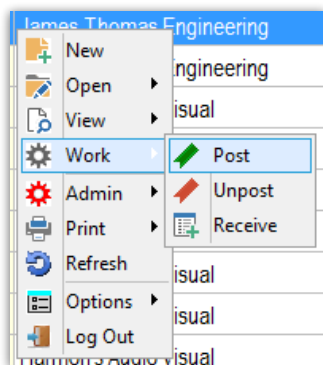
Post a Purchase Order

There are several status levels for a purchase order:

- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.
- **Received** – the purchase order has been processed and received, equipment that was requested is now in stock.

To place a purchase order into Posted status, the purchase order must be approved.

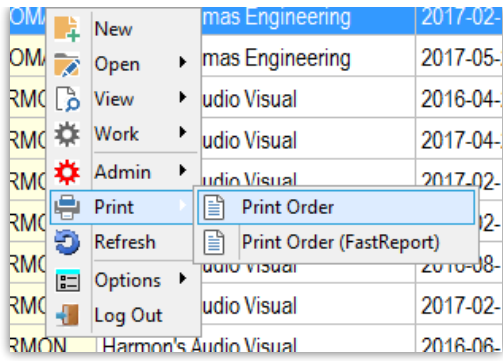
Right click on the Purchase Order-->Work-->Post (to reverse click 'unpost')



Operational Parameter #159 affects approval level. Please review this parameter if the system is not functioning as expected.

Print a Purchase Order

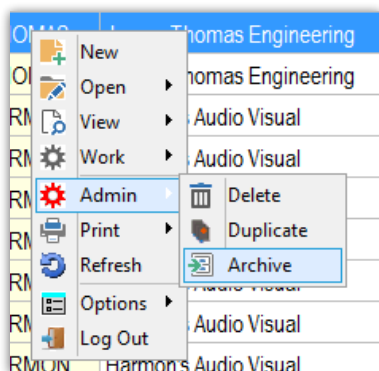
RentalPoint ships with default purchase order templates that can be easily edited to contain your company information as well as logo. To print a purchase order right click and select Print. You will be prompted through the custom printing menu to select a template.



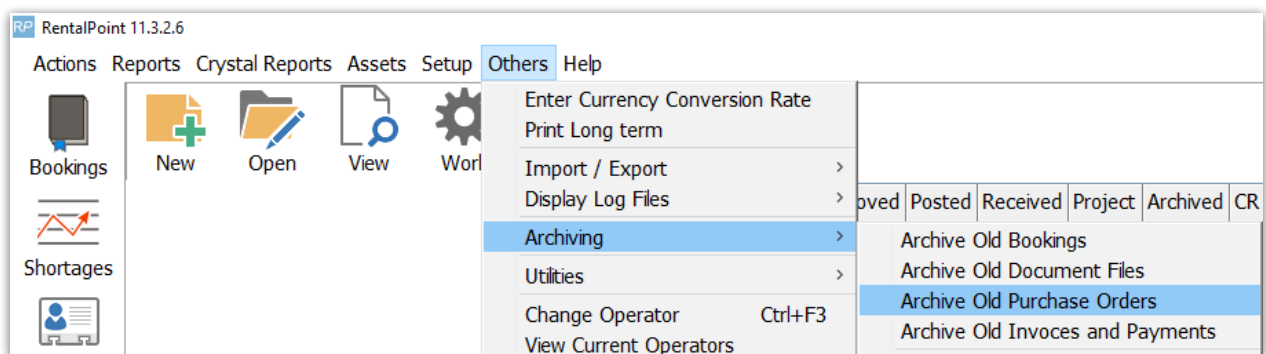
Archive a Purchase Order

Archiving has several advantages in the RentalPoint system. Firstly it can remove older entries that are no longer relevant to your operations. RentalPoint doesn't need to load as much information from the database and performance is improved.

Archive a single received purchase order from the Purchase Order Grid via right click on the order-->admin-->archive



Batch archive from the Main Menu via Others --> Archiving ->Archive Old Purchase Orders



Operational Parameter #9 will determine the number of days to hold a received purchase order before it is archived.

RentalPoint Version 11 Parameter Setup

Company Name Invoicing Custom Printing Booking Hardcopy

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

Web and Email

Archive Settings

Archive Criteria
First, determine if bookings need to be returned and/or invoiced before archive. If this doesn't matter, set the option to 'old enough', then all bookings are eligible.

Archive Criteria

- None (old enough)
- Returned
- Invoiced
- Both

Days to Hold Before Archiving
Second, determine the number of days to hold those bookings before they're archived. The minimum amount of time to hold bookings is 14 days.

600

Months to Keep in Archive
Last, determine how many months you want to keep bookings in archive before permanently deleting them. The minimum amount of time to keep bookings in archive is 18 months. To permanently delete bookings you need to run the Purge option from the main menu.

48

Current Data Sub hires

OK

