

# V12 New Features

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- [RoadCase Items Added at Checkout](#)

## Major New Features

### Quickbooks Online

- Rentalpoint now integrates with Quickbooks Online [<more information>](#)

### Mobile Web Browser Based Delivery App

- Use this Web based Mobile Delivery App to view RentalPoint scheduled Deliveries and Returns, Print a Delivery Sheet/ Collection Docket and Collect Digital Signatures on the go. Scalable to fit on any tablet or cell phone screen! [<more information>](#)

### Festival / Major Event Product Scheduling Optimization

- 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. [<more information>](#)

### Consolidated Location Availability

- Ability to consider overall product availability in addition to the availability at a specific location [<more information>](#)

### Auto Resolve Items Added at Checkout

- Automatically match assets substituted at checkout with their parent [<more information>](#)

### Schedule a Quick Turnaround or Direct Asset Transfer

- Select products that may be short, select quick turnaround or direct asset transfer, prints on pick list [<more information>](#)

### DocuSign Integration

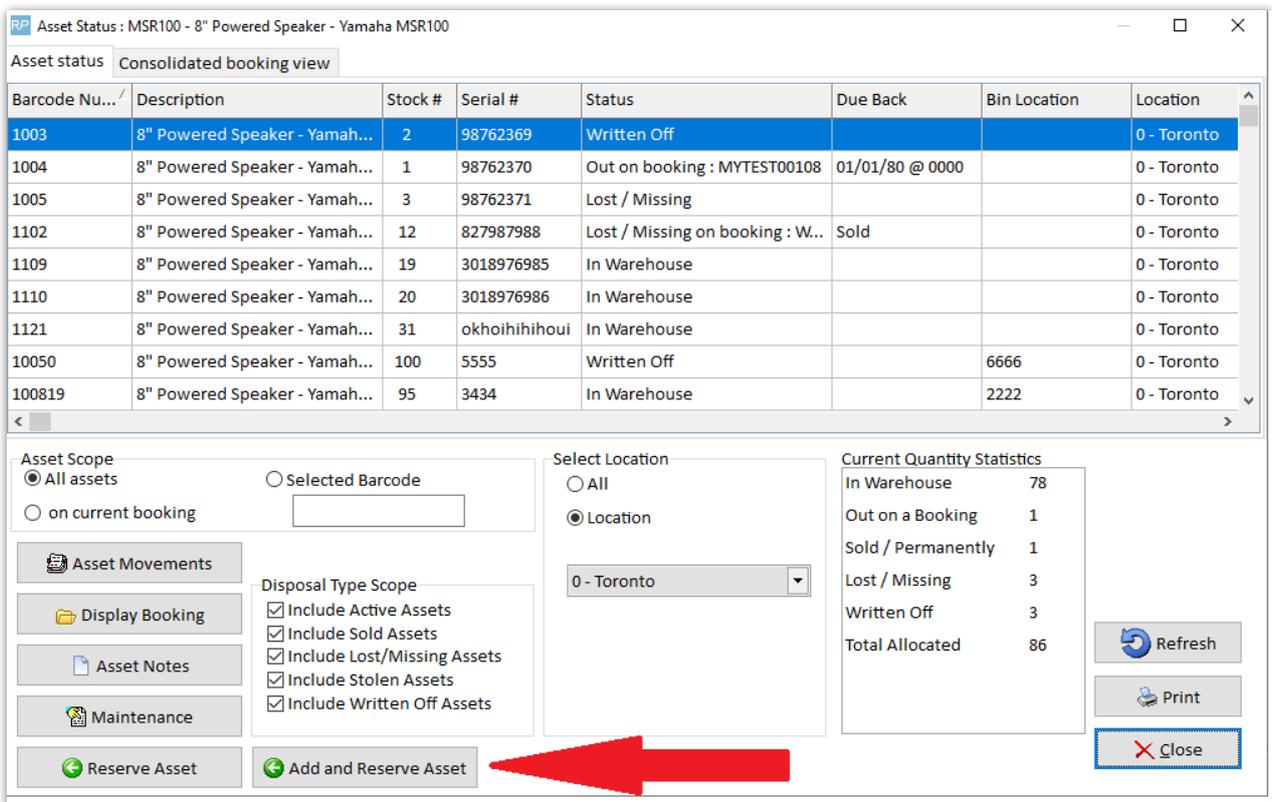
- Prompt clients and prospects to sign-off on proposals online. Receive and display e-signatures in RentalPoint. [<more information>](#)

## Virtual Carnet

- Build a Virtual Carnet for checked out bookings. Users can create a list of boxes/cases, allocate items to each case and either manually enter dimensions or have RentalPoint load dimensions from Inventory setup. Print the Carnet on completion for use as customs documentation when shipping internationally. Operator privileges control the level of user access to this functionality, here's how it works [<more information>](#)

## Asset Reservations

New options to Reserve Assets from within the Asset Status Window

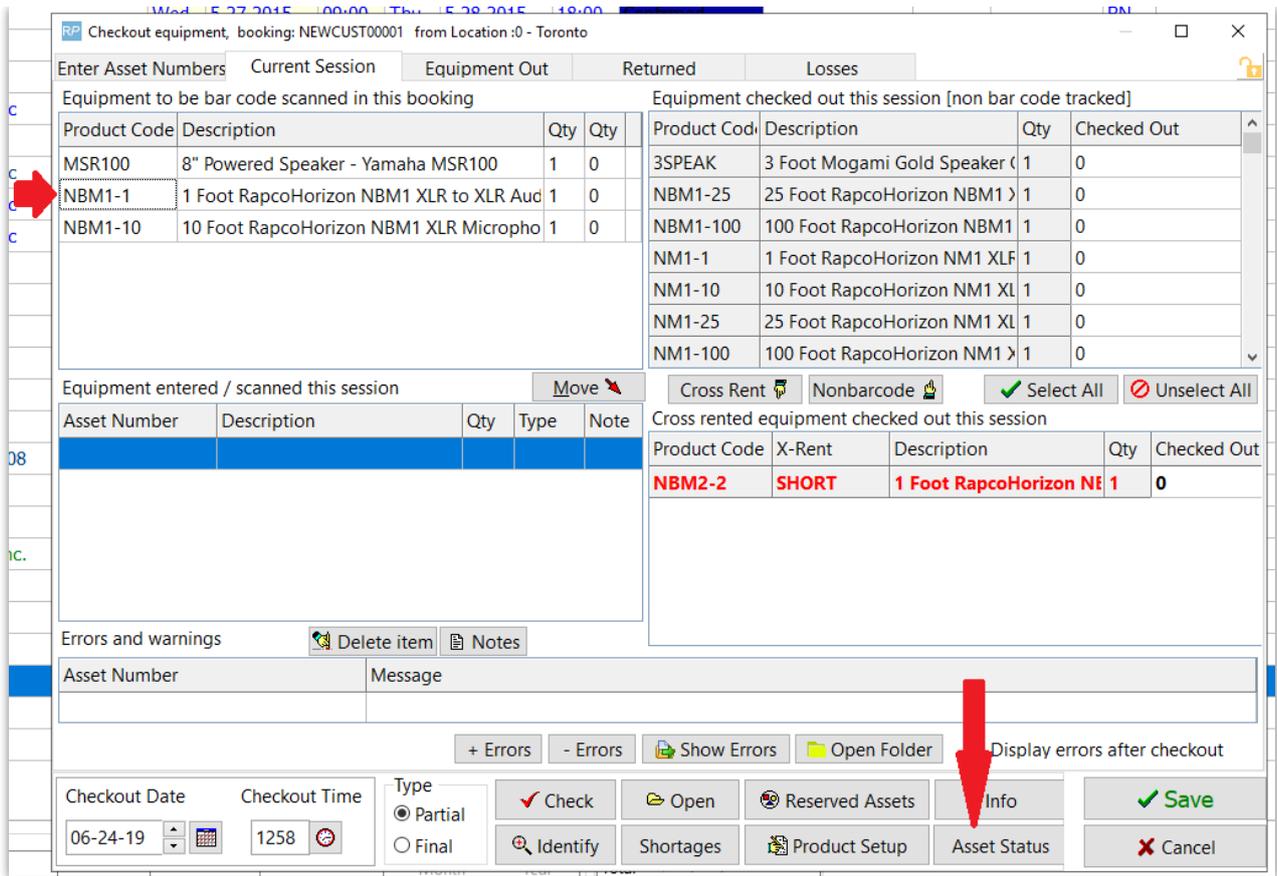


The screenshot shows the 'Asset Status' window for 'MSR100 - 8" Powered Speaker - Yamaha MSR100'. The window is in 'Consolidated booking view' and displays a table of assets with columns for Barcode Number, Description, Stock #, Serial #, Status, Due Back, Bin Location, and Location. Below the table, there are several control panels: 'Asset Scope' with radio buttons for 'All assets' (selected) and 'on current booking'; 'Asset Movements' with buttons for 'Asset Movements', 'Display Booking', 'Asset Notes', 'Maintenance', 'Reserve Asset', and 'Add and Reserve Asset' (highlighted with a red arrow); 'Disposal Type Scope' with checkboxes for 'Include Active Assets', 'Include Sold Assets', 'Include Lost/Missing Assets', 'Include Stolen Assets', and 'Include Written Off Assets'; 'Select Location' with radio buttons for 'All' and 'Location' (selected) and a dropdown menu showing '0 - Toronto'; and 'Current Quantity Statistics' showing: In Warehouse (78), Out on a Booking (1), Sold / Permanently (1), Lost / Missing (3), Written Off (3), and Total Allocated (86). At the bottom right, there are buttons for 'Refresh', 'Print', and 'Close'.

Barcode Nu.../	Description	Stock #	Serial #	Status	Due Back	Bin Location	Location
1003	8" Powered Speaker - Yamah...	2	98762369	Written Off			0 - Toronto
1004	8" Powered Speaker - Yamah...	1	98762370	Out on booking : MYTEST00108	01/01/80 @ 0000		0 - Toronto
1005	8" Powered Speaker - Yamah...	3	98762371	Lost / Missing			0 - Toronto
1102	8" Powered Speaker - Yamah...	12	827987988	Lost / Missing on booking : W...	Sold		0 - Toronto
1109	8" Powered Speaker - Yamah...	19	3018976985	In Warehouse			0 - Toronto
1110	8" Powered Speaker - Yamah...	20	3018976986	In Warehouse			0 - Toronto
1121	8" Powered Speaker - Yamah...	31	okhoihihou	In Warehouse			0 - Toronto
10050	8" Powered Speaker - Yamah...	100	5555	Written Off		6666	0 - Toronto
100819	8" Powered Speaker - Yamah...	95	3434	In Warehouse		2222	0 - Toronto

- [<full documentation on how to reserve assets>](#)

Asset Status now available in checkout window so as to quickly identify asset allocation and availability



## Consolidated Asset Status View

Easily identify asset allocation with 'Current Quantity Statistics' breakdown in the asset status window!

The Scope for 'Barcode', 'Location/Region' and 'Disposal Type' (fig A below) limit the bookings that appear in the grid. The 'Current Quantity Statistics' (fig B below) will only include the quantities for assets within the scope.

Asset Status : MSR100 - 8" Powered Speaker - Yamaha MSR100

Asset status **view**

Barcode	Description	Stock #	Serial #	Status	Due Back	Bin Location	Location
1003	8" Powered Speaker - Yamaha M...	2	98762369	Written Off			0 - Toronto
1004	8" Powered Speaker - Yamaha M...	1	98762370	In Warehouse			0 - Toronto
1005	8" Powered Speaker - Yamaha M...	3	98762371	In Warehouse			0 - Toronto
1006	8" Powered Speaker - Yamaha M...	4	98762372	In Warehouse			0 - Toronto
1008	8" Powered Speaker - Yamaha M...	5	98762374	In Warehouse			0 - Toronto
1009	8" Powered Speaker - Yamaha M...	6	98762375	In Warehouse			0 - Toronto
1102	8" Powered Speaker - Yamaha M...	12	827987988	In Warehouse			0 - Toronto
1109	8" Powered Speaker - Yamaha M...	19	3018976985	In Warehouse			0 - Toronto
1110	8" Powered Speaker - Yamaha M...	20	3018976986	In Warehouse			0 - Toronto
1121	8" Powered Speaker - Yamaha M...	31	okhoihihou	In Warehouse			0 - Toronto

Asset Scope:  All assets

Asset Movements

Display Booking

Asset Notes

Maintenance

Selected Barcode:

Disposal Type Scope:
  Include Active Assets  
 Include Sold Assets  
 Include Lost/Missing Assets  
 Include Stolen Assets  
 Include Written Off Assets

Select Location:
  All  
 Location  
 0 - Toronto

Current Quantity Statistics:
 In Warehouse: 84  
 Out on a Booking: 0  
 Sold / Permanently Out of: 1  
 Lost / Missing: 1  
 Written Off: 3  
 Total Allocated: 89

Refresh, Print, Close

Consolidated Booking View shows bookings the asset is scanned on. As mentioned above, the scope used will affect what bookings are displayed and the totals reflected in Current Quantity Statistics.

Asset Status : MSR100 - 8" Powered Speaker - Yamaha MSR100

Asset status **Consolidated booking view**

Booking	Show Name	Date Out	Date In	Still Out
WATBUS00003		04/29/2019 09:00	04/29/2019 18:00	1

Asset Scope:  All assets

Selected Barcode:

Display Booking

Disposal Type Scope:
  Include Active Assets  
 Include Sold Assets  
 Include Lost/Missing Assets  
 Include Stolen Assets  
 Include Written Off Assets

Select Location:
  All  
 Region  
 0 - ONE  
 Location  
 0 - Toronto

Current Quantity Statistics:
 In Warehouse: 82  
 Out on a Booking: 1  
 Lost / Missing: 1  
 Written Off: 4  
 Total Allocated: 88

Refresh, Print, Close

- [<Full Documentation>](#)

# General

## New Booking Grid Search

- [<More details here>](#)

## New Insert Field to Identify Backup Equipment

[More Information on Insert fields here]

Insert field **&BKONC&** placed above the detail line will cause backup lines to display ' - SPARE' in the description

Example:

Item identified as backup equipment on equipment grid of booking

SFPBD	SOURCE 4 PAR BARN DOOR	6	14	0	2.00	0.00	15.00	Sng	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
R150B	ROBE ROBIN 150 LED BEAM	12	19	0	60.00	0.00	900.00	Sng	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
R150B	ROBE ROBIN 150 LED BEAM	1	7	0	60.00	100.00	0.00	Backup :	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LA1000V2	LANTA AURORA 1000 V2 LED BATTEN	16	124	0	32.00	0.00	640.00	Sng	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LA1000V2	LANTA AURORA 1000 V2 LED BATTEN	2	108	0	32.00	0.00	0.00	Sng	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
P64CLED3	FIREBALL PAR 64 QUAD 18x8w LED CHROME FLOORCAN	8	74	0	28.00	0.00	280.00	Sng	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## RTF Template



SC08MT05C8

### Pick List

Printed  
&tdatN& &timeC&  
BY  
&BSALESPC&

Page 1 of 1

JOB: &bookNoC&  
STATUS: &BKSTATEC&  
CUSTOMER: &CoC&  
JOBNAME: &SHOWNAMC&

&EQLEFTMN:0& &DETCREWC&&SUPHEADC&

**Prepared For:**  
&CoC&  
&Cadl1C& &Cadl2C&  
&Cadl3C& &STATEC&  
&CustposC& &CNTRYC&

Contact: &bcontC&  
Telephone: &CphoneC&  
Fax: &CfaxC&

**Dates:**  
Deliver: &ACTDELDN:8& at &dttimeC&  
Setup By: &SETUPDN:8& at &dttimeC&  
Show: &SHWSDN:8& at &SHWSTIMC&  
Show End: &SHWENDDN:8& at &SHWENDTC&  
Pick-up: &PICRETN:8& at &rtimeC&

**Job Site:**  
Venue: &delToC&  
Room: &VroomC&  
Address: &dadrl1C& &dadrl2C&  
&dadrl3C& &VNSTATEC&  
&VNPOCDEC& &VNCNTRYC&

Contact: &VcontC&  
Telephone: &dphoneC&

&BKONC& ← Control insert field used to identify backup gear with '-spare' and end of description

QTY	Description	Ready	Loaded	Returned	Short
&QTYN:3&	&DESCC:50& &CHECKBXC[4]&				

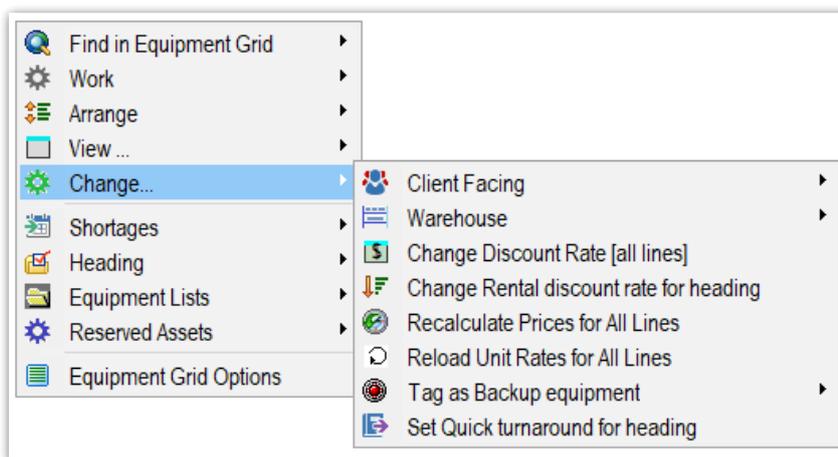
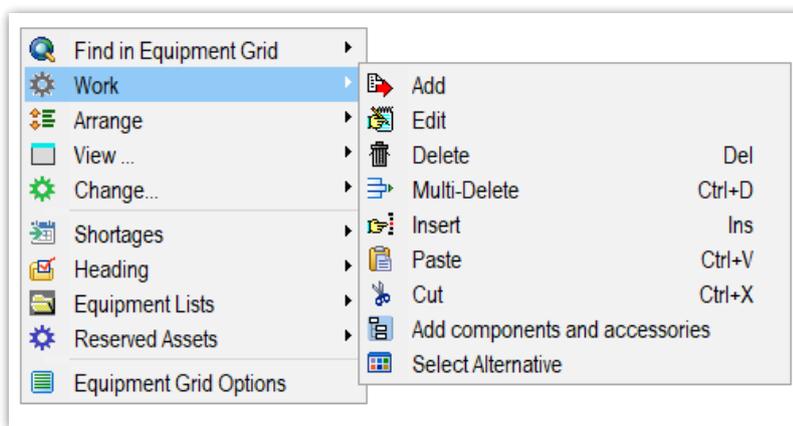
**Installation Instructions**  
&instru1C& &instru2C&  
&instru3C& &instru4C&

## Output Doc

LED FIXTURES			
R150B	ROBE ROBIN 150 LED BEAM		12
R150B	ROBE ROBIN 150 LED BEAM - SPARE		1
LA1000V2	LANTA AURORA 1000 V2 LED BATTEN		16
LA1000V2	LANTA AURORA 1000 V2 LED BATTEN		2
P64CLED3	FIREBALL PAR 64 QUAD 18x8w LED CHROME FLOORCAN		8
P64CLED3	FIREBALL PAR 64 QUAD 18x8w LED CHROME FLOORCAN		1
EFFECTS			

## Revised Equipment Grid Menu

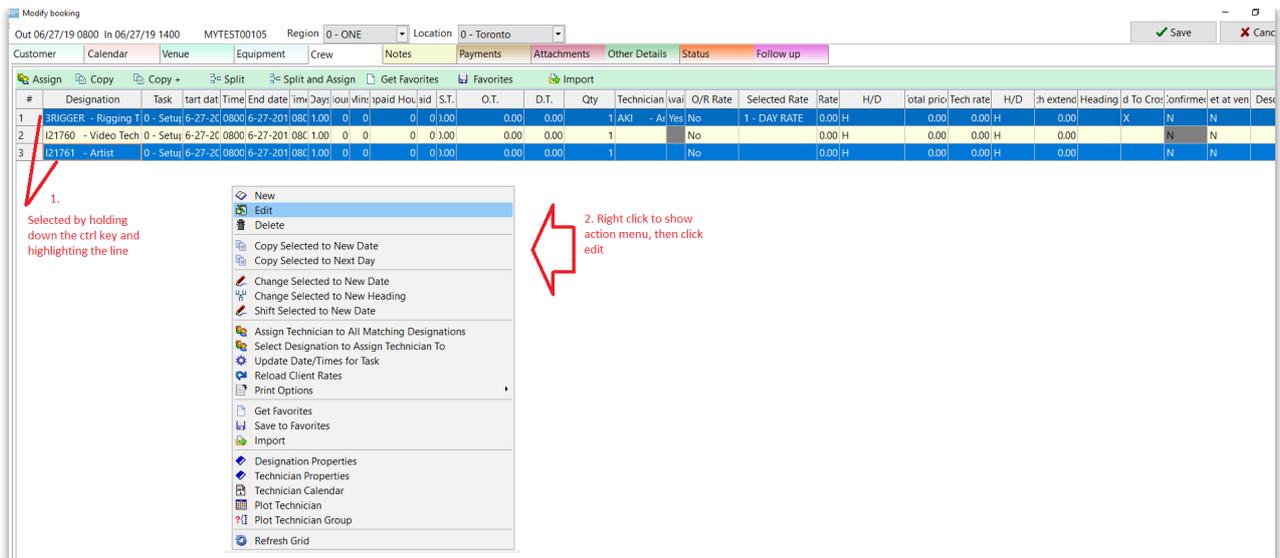
While all options are still available, the Equipment Grid right click menu has been re-organized for improved display.



## Multi-Edit Labour Entries

The same technician can be assigned to multiple shifts at the same time using the multi-edit feature!

First select the required lines by holding down **shift** (or **ctrl** for non consecutive lines).



Click **Edit** and the properties for the first selected technician assignment will display.

- Select the technician required and click **Update**.
- A prompt will appear asking if you want to update all the lines.
- The technician and rate information will be applied to all the selected lines as long as the selected technician is qualified for the designation. Where the technician is not qualified for a designation, the line will be skipped.
- If the crew designations are different, the appropriate technician rate for that designation will be loaded.

Technician Assignments - MYTEST00105

Crew Entry      Notes

Designation: 3RIGGER - Rigging Technician      Task: 0 - Setup      Start Date: 06-27-19      Time: 0800      Qty: 1

Job Description:      End Date: 06-27-19      Time: 0800

Our Cost

Technician: JJ - Jeremy Jones      Avail: Yes      Technician Rate: 0.00      H/D: H      Technician Extended: 0.00      Job Offered Status: Approved      7-2-2019 13:05

Confirmation Level: Unconfirmed       Conflict       Confirmed       Meet at venue.

Potential Cross rental

Client Charge      Reload Rates

O/R Rate: No      Select Rate: 1 - DAY RATE      Rate: @ 0.00 P/H      0.00      H/D: H      Total Price: 0.00

Hourly Rate Structure: Default      Days: 1      Hours: 0      Mins: 0      Unpaid Time: Hours: 0      Mins: 0      Total: Hours: 0      Mins: 0      S.T.: 0.00      O.T.: 0.00      D.T.: 0.00

Heading:      Print options:  Print Assignment on Quote       Print Crew At End of List       Print Assignment on Invoice

Plot Tech Group      Plot Tech      Tech Calendar      Tech Properties      Designation Properties      Update      Cancel

Note: Where a P.O is entered during a multi-edit session, the PO details are applied to all qualified entries

Technician Assignments - MYTEST00105

Crew Entry    Notes    Cross rental Entry

Designation: 3RIGGER - Rigging Technician    Task: 0 - Setup    Start Date: 06-27-19    Time: 0800    Qty: 1

Job Description:    End Date: 06-27-19    Time: 0800

Our Cost

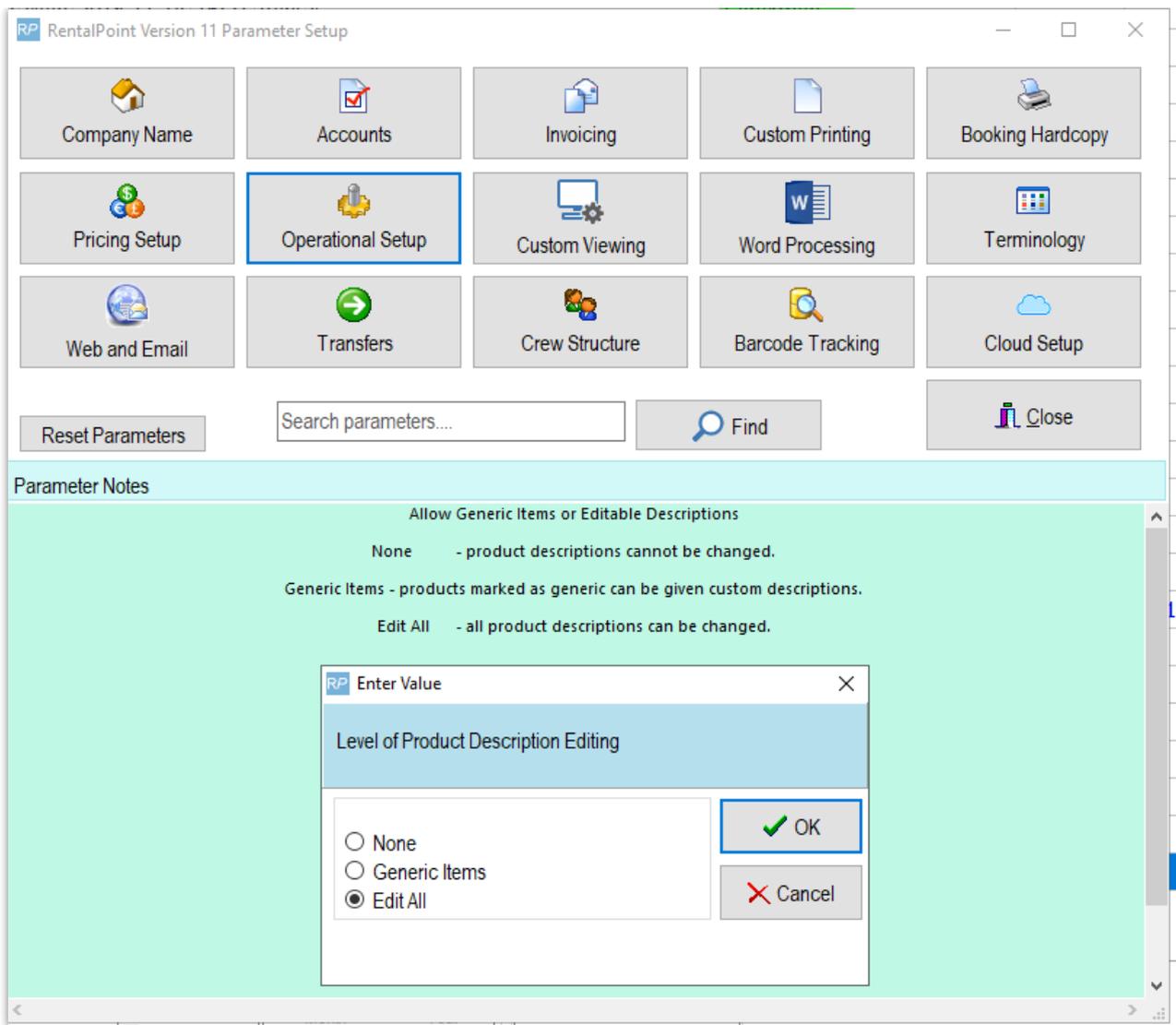
Technician: JJ - Jeremy Jones    Avail: Yes    Technician Rate: 0.00    H/D: H    Technician Extended: 0.00    Job Offered Status: Approved    7-2-2019 13:05

Confirmation Level: Unconfirmed     Conflict     Confirmed     Meet at venue.

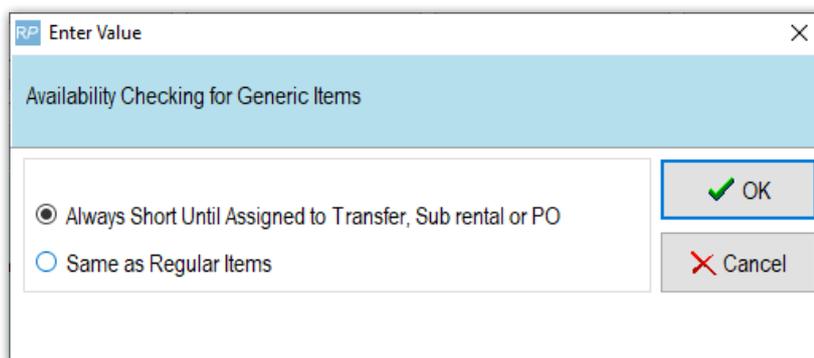
Potential Cross rental    Current P.O. # / Booking #   

## Generic Items

Systems with Operational parameter #127 'Allow Generic Items or Editable Descriptions' set to 'Edit All' can now use generic item and the settings applicable to those products.



Even with 'Edit All' option chosen, the user still has the option to set how availability is calculated for Generic Items.



Note: Generic items are identified in Product Setup

RP Edit Product Record :

General Picture Rental Rates Sales Notes Location Attachments Barcode

Product Information

Product Code: GEN21

Description:

Model No.:

Color:

Part Number:

Qty Owned: 0.00 (All Locations)

Country of Origin:

Revenue Code:

Default Accessory Discount:

Non-tracked Barcode:

Printing Descriptions Printing Options

Description for Client Facing Documents:

Product Options Transfer Options Unit Specifications Price restriction overrides

For Individual Rental / Sale

Barcode Track

Don't allow product to be discounted

Product is a Generic Item

Expand When Added to a Booking

Auto Checkout this Item

Warehouse active

When Cross rented, the cost is freight

Configuration

Single item

Package product

Macro product

Shipping

Is shipped on it's own

Is a road case

Always shipped in a road case

Is a rack

OK Cancel

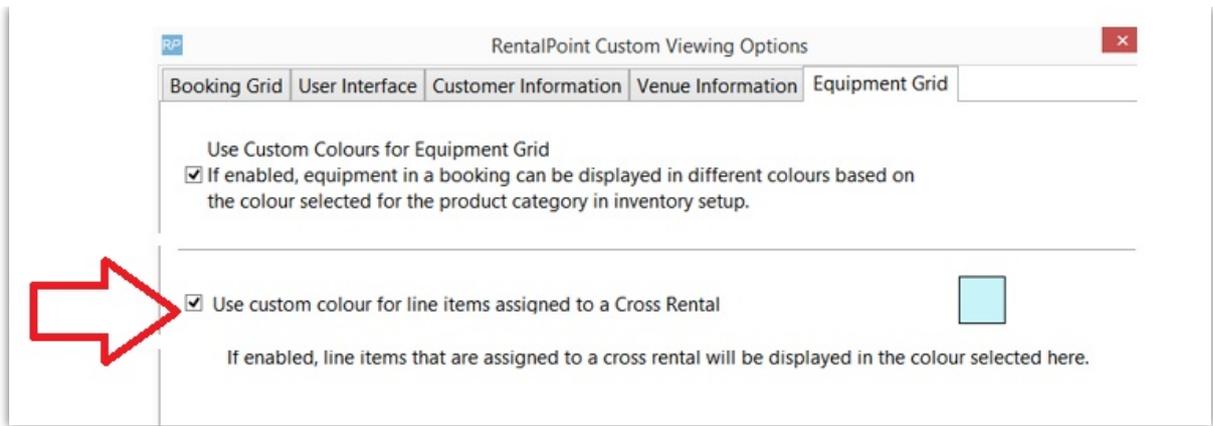
## Custom Colours for Assigned Cross Rentals

Goto Setup-->Parameters off the main RentalPoint menu, then click 'Custom Viewing'

RentalPoint Version 11 Parameter Setup

Accounts	Invoicing	Custom Printing
Operational Setup	Custom Viewing	Word Processing
Transfers	Crew Structure	Barcode Tracking

- Click 'Use Custom Colour for line items assigned to a Cross Rental', to display assigned cross rentals in a different colour



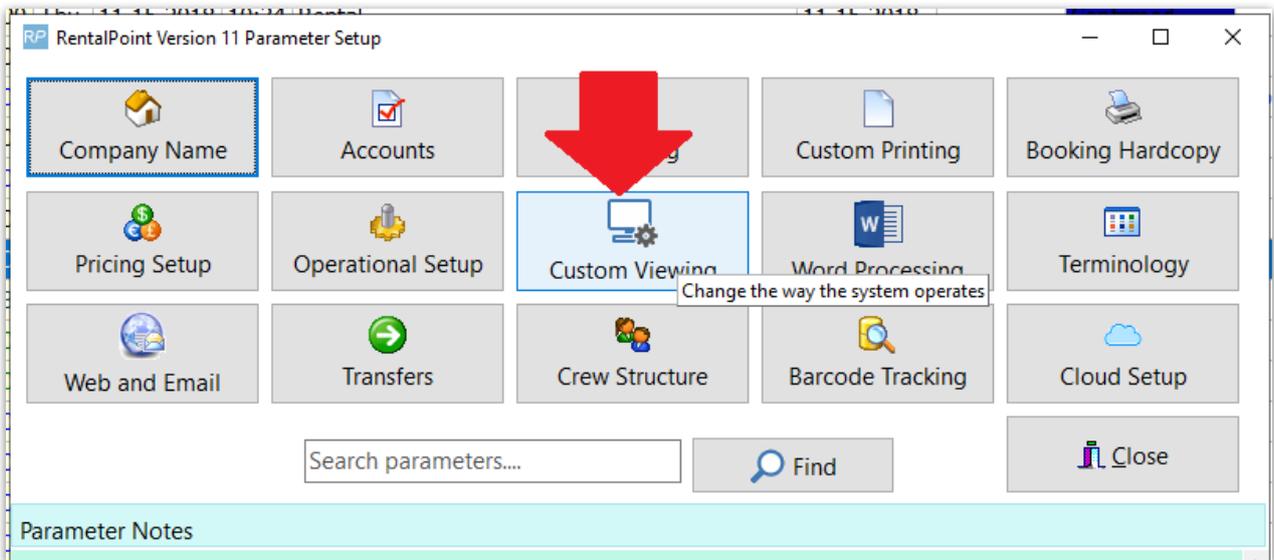
Below is a sample of how a line item with an assigned cross rental would display on the equipment grid of a booking, based on the colour settings in 'Custom Viewing' Equipment Grid Parameters

Code	Description	Quantity	Avail	Short	rental	ep Qty	ck T/A	Unit Rate	Days	%disc	Price/Stat
LIGHT	Lighting	4	0	4	4	0	0	0.00	1	0.00	0.00 V00700010
CABLES	Cables	1	590	0	0	0	0	0.00	1	0.00	0.00 Sng
CHAIR	Blue Chairs	- 1 +	0	1	1	0	0	0.00	1	0.00	0.00 enq

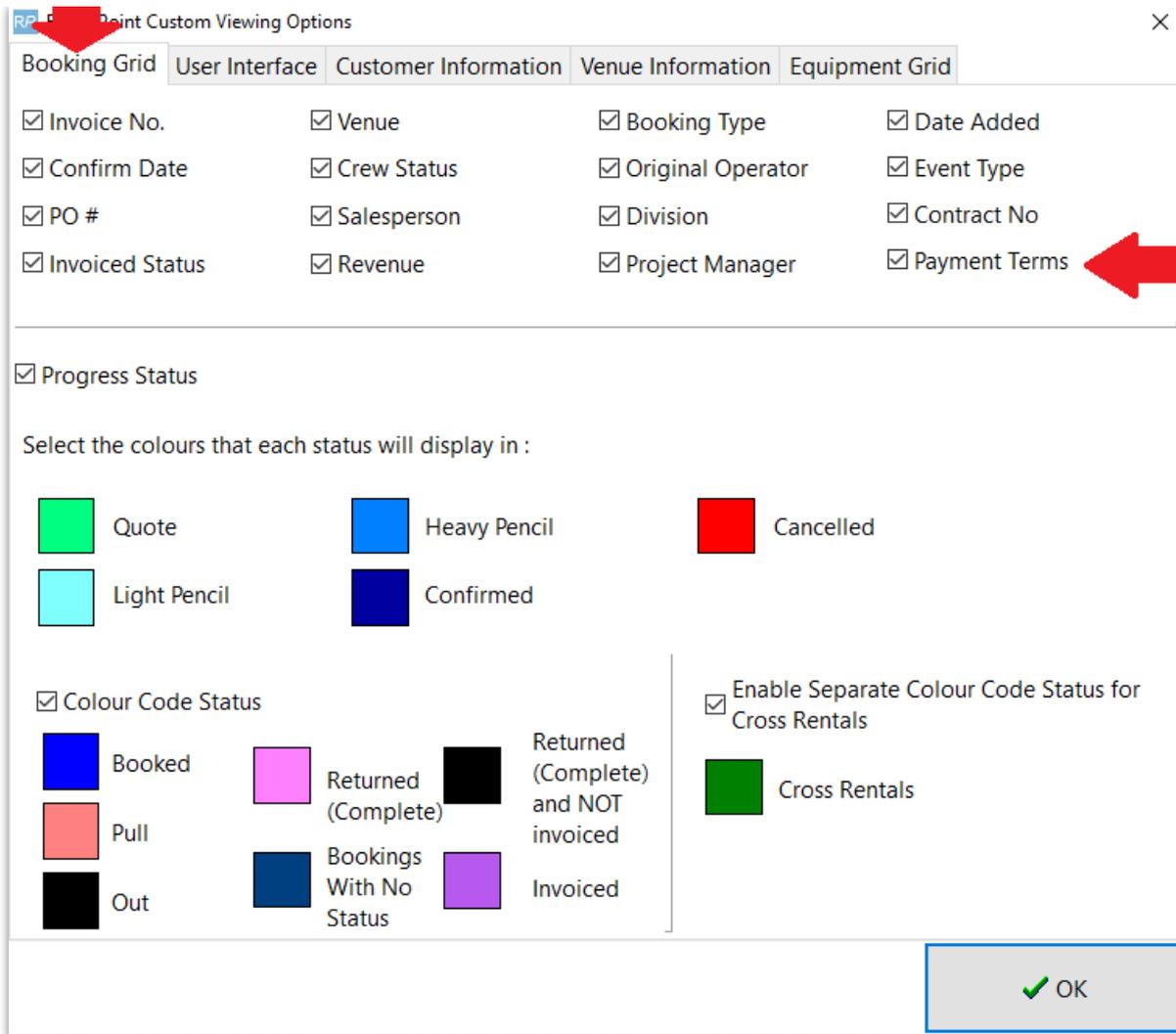
## Payment Terms now visible on Booking Grid

[Full details on Booking Grid here]

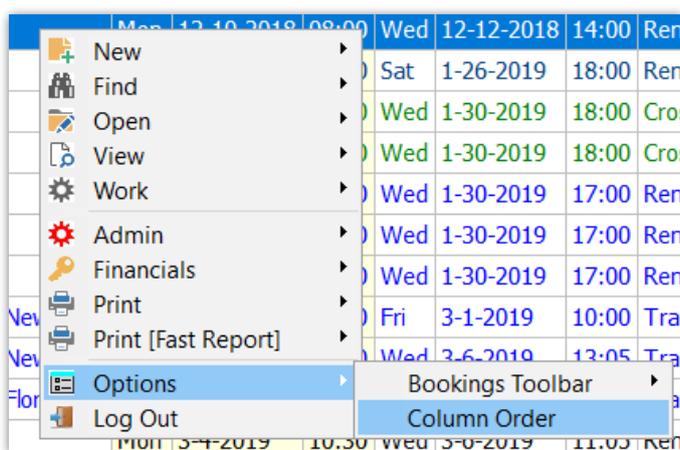
Goto Setup-->Parameters-->Custom Viewing



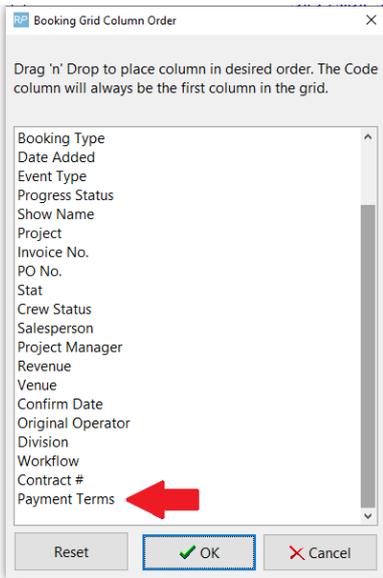
Check the Box for Payment Terms



Right Click on the booking Grid-->Options-->Column Order



Drag and drop the Payment Terms column to desired order for the grid



See Payment Terms Column on Booking Grid

Code	Company	Out Date	In Date	Booking Type	Date Added	Event Type	Progress Status	Show Name	Project	Invoice No.	Payment Terms	PO No.	Stat	Crew Star
MYTEST00094	MYTEST	11-15-2018 08:00	Thu 11-15-2018 10:34	Rental	11-15-2018		Confirmed				30 day account		RN	Not Requ
MYTEST00095	MYTEST	11-15-2018 17:01	Thu 11-22-2018 17:00	Rental Extended From : 00094	11-15-2018		Confirmed				30 day account		ON	Not Requ
MYTEST00081	MYTEST	11-20-2018 13:00	Thu 11-22-2018 20:00	Rental	10-17-2018	test	Confirmed	Gibson Wedding		195	30 day account DD		BY	Not Requ
GOLDMAN00001	Goldman Sachs & Co	12-4-2018 08:00	Tue 12-4-2018 11:08	Rental	12-4-2018		Confirmed				* Cash on delivery		RN	Not Requ
THISCUST00006	thiscust	12-6-2018 08:00	Thu 12-6-2018 14:00	Rental	12-6-2018		Confirmed		TESTR	191	* Cash on delivery		BY	Not Requ

Payment Terms is also available for sort sequence

## Statement of Work

The notes tab of a booking now accepts 'Statement of Work' separate to 'Booking Notes' [<more information>](#)

## RentalPoint Stripe Integration - Strong Customer Authentication

Update to the latest release of RentalPoint Stripe to avail of this feature [<more information>](#)

## New Auto-email Settings

- In order to cut down on notifications that are not relevant to the user, auto-emailing can be restricted to only include the bookings where an operator is the salesperson or project manager on the booking. These restrictions can be set on the Group or Operator Level. [<more information on pages 6-8 of this doc>](#)

## Overdue for Invoicing Scope

New scope for Overdue Invoices:

- **Include zero value bookings:** will show or hide bookings with zero values that may not need to be invoiced
- **Search On:** Allows for search scope on a specific field or all fields

RP Reminders For Overdue Items

Overdue For Invoicing	POs to be Reviewed	Sub-Hire Review	Virtual Carnet
Booking Number	Project Number	Organisation	Showname
7898700005		Goldman, Sachs & Co.	
AIRPUSH00006		AIRPUSH, INC.	
AIRPUSH00008		AIRPUSH, INC.	
AIRPUSH00009		AIRPUSH, INC.	te
AIRPUSH00012		AIRPUSH, INC.	
AIRPUSH00016		AIRPUSH, INC.	Gibson Weddi
AIRPUSH00019		AIRPUSH, INC.	
AIRPUSH00021		AIRPUSH, INC.	
BRIST00003		BRISTOL-MYERS SQUIBB	
BRIST00004	NORCHES4	BRISTOL-MYERS SQUIBB	
BRIST00008		BRISTOL-MYERS SQUIBB	
BRIST00014		BRISTOL-MYERS SQUIBB	te
BRIST00015		BRISTOL-MYERS SQUIBB	te

< | [Open] | [Quick Look] | [Invoice]

Display Preferences

- Overdue Unconfirmed
- Overdue for Checkout
- Overdue For Return
- Overdue For Invoicing
- Overdue For Project Invoicing
- Bookings To Be Re-Invoiced
- Long Term To Be Invoiced
- Reserved Asset Conflicts
- Job Reports
- POs to be Reviewed
- Sub-Hire Review

Display Values In

- Local Currency
- Order Currency

Location Scope

- All
- Location

0 - Toronto

Include zero value bookings

Search on

- Project Number
- Company
- Showname
- Salesperson
- Any field

Search for

## Inventory

### Discrepancy Report Shows 'Items not Returned'

The discrepancy report [Items Not Returned] will now display lost, stolen or written off items and contains the date the item was marked as disposed.

Reports Crystal Reports Assets Setup Others Help

Product Reports  
 Booking Reports  
 Crew Reports  
 Financials

Booking Cross Section  
 Discrepancy Report [Items Not Returned]  
 Late Returns

Printed :06/21/19 Discrepancy report Page :1

For Location :0 - Main  
 Not returned from Rental

Product Code	Stock No.	Barcode Number	Serial Number	Description	Customer	Status	Date	Booking #
13T	1	13T1		1.3 TB Drive	ABC 2 5555544	ACTIVE		ABC2555500023
13T	2	13T2		1.3 TB Drive	ABC 2 5555544	ACTIVE		ABC2555500023
EEE	21	E21		eee	AED Customer	ACTIVE		AED100056
EEE	22	E22		eee	AED Customer	ACTIVE		AED100056
EEE	23	E23		eee	AED Customer	ACTIVE		AED100056
30MON	18	30IN18		30 inch monitor	AED Customer	ACTIVE		AED100059
50IN	91	50I91		50 inch monitor	AED Customer	ACTIVE		AED100059
50IN	89	50I89		50 inch monitor	AED Customer	ACTIVE		AED100060
50IN	90	50I90		50 inch monitor	AED Customer	ACTIVE		AED100060
30MON	16	30IN16		30 inch monitor	AED Customer	ACTIVE		AED100060
30MON	17	30IN17		30 inch monitor	AED Customer	ACTIVE		AED100060
9RACK	1	2M1		2m Rack	bill to	ACTIVE		BILLTO00003
GREEN	1	G1		green chairs	bill to	ACTIVE		BILLTO00003
GREEN	26	G17		green chairs	date range test	LOST	06/19/19	DATERANG00034
YELLOW	12	Y16		yellow chairs	East-west telecom	ACTIVE		EA3300001
YELLOW	13	Y17		yellow chairs	East-west telecom	ACTIVE		EA3300001
YELLOW	14	Y18		yellow chairs	East-west telecom	ACTIVE		EA3300001
YELLOW	15	Y19		yellow chairs	East-west telecom	ACTIVE		EA3300001

## List Orphaned Cross Rentals and Transfers

The 'Reminder for Overdue Items' window now has an option to list items from sub rentals and transfers, that do not have a corresponding item in a booking. This can happen if equipment on a booking is modified after a cross rental or transfer has been created for that equipment, thus rendering the transfer or cross rental unnecessary. The 'List Orphaned Cross Rentals and Transfers' option allows orphaned items to be reviewed and removed as needed, so they aren't sub rented or transferred unnecessarily. [See Full documentation on Reminder For Overdue Items here](#)

Display Preferences

- Overdue Unconfirmed
- Overdue for Checkout
- Overdue For Re-Bookings not delivered
- Overdue For Invoicing
- Overdue For Project Invoicing
- Bookings To Be Re-Invoiced
- Long Term To Be Invoiced
- Reserved Asset Conflicts
- Target Margins
- Orphaned Cross rentals

Region / Location Scope

- All
- Region: 0 - ONE
- Location
- Region: 0 - Toronto

Operator Scope

- All Operators
- Operator
- RP

Salesperson Scope

- All
- Salesperson

Booking Type

- Rental
- Sale
- Cycle billed 7
- Cycle billed 14
- Cycle billed 28
- Cycle billed Monthly
- Cycle billed Quarterly

Reset Timer Print Close

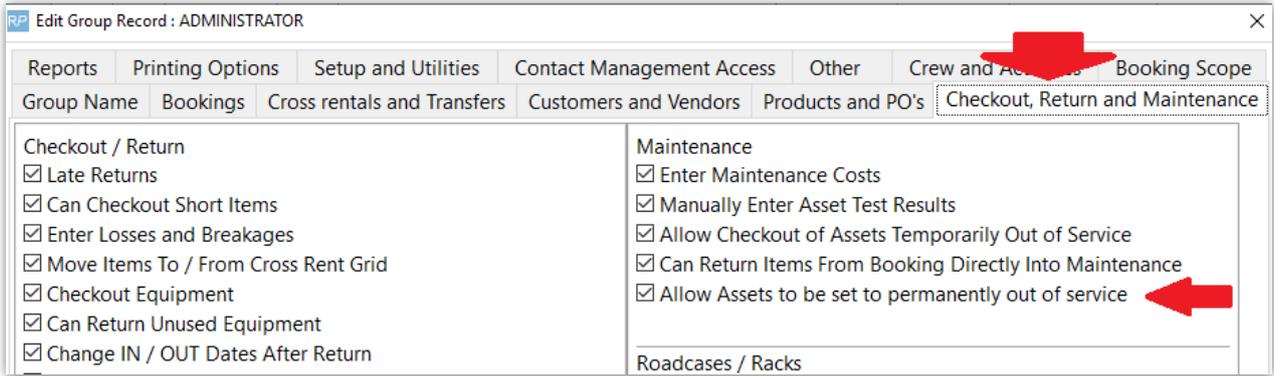
## New Asset Maintenance Options

1. <Find Maintenance Record>
2. <Print Maintenance Record>

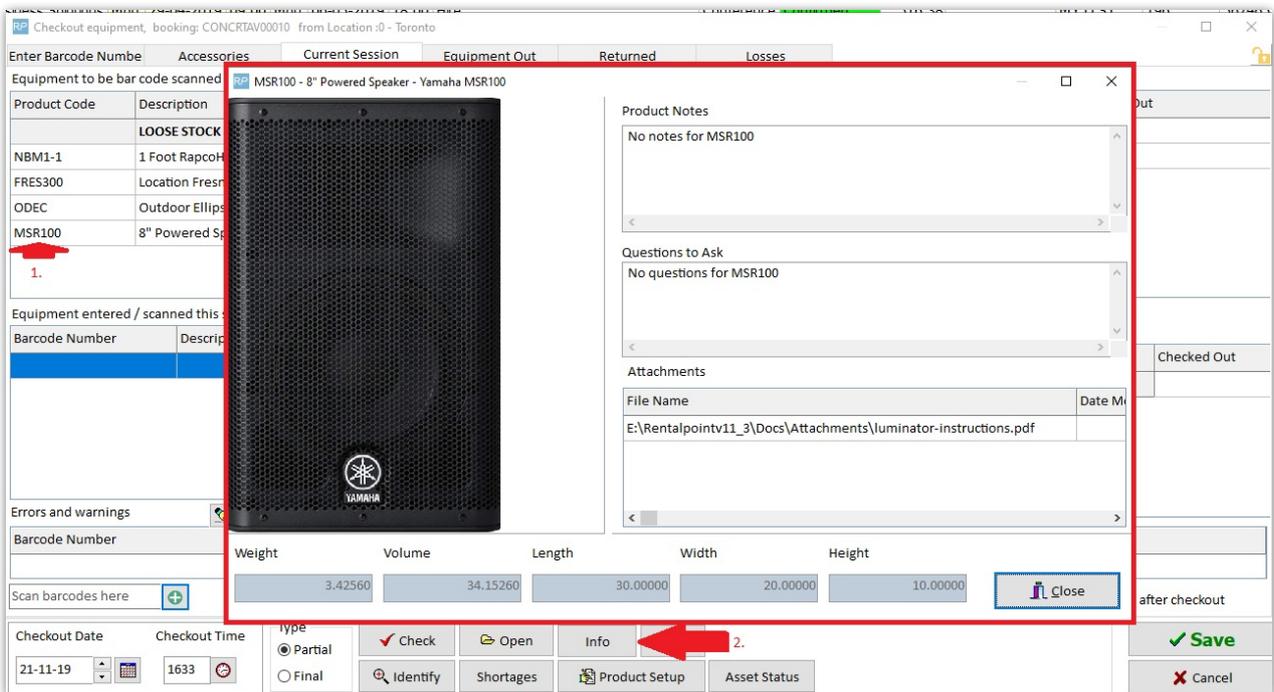
## New Operator Privilege - Permanently set asset 'Out of service'

- Goto Setup-->Operators
- Edit Operator Group

When unchecked, the user will NOT be able to set any asset to 'permanently out of service'



## Product Info Button on Checkout Window



## Checkout/Return & Resolve Discrepancies Windows

### New Parameter - 'Action when roadcase item scanned at checkout'

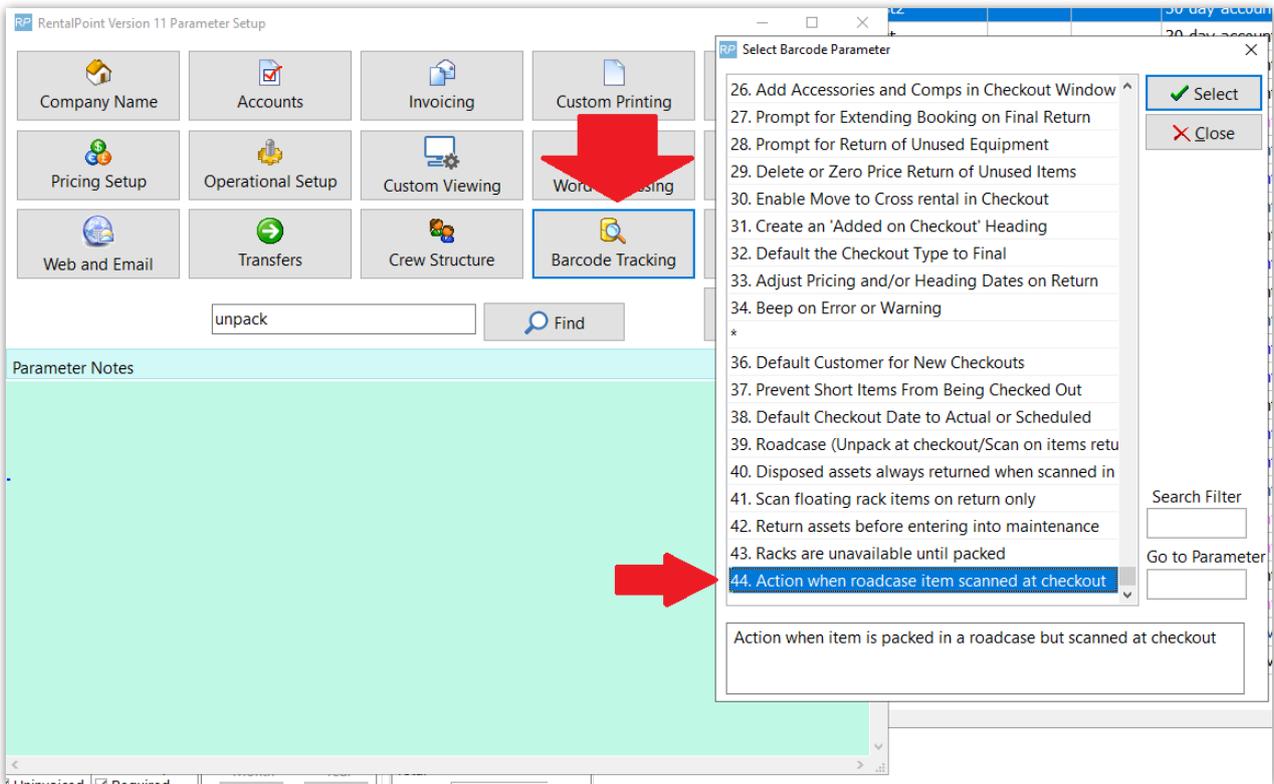
Predetermine how RentalPoint should handle items that are packed in a roadcase, but scanned out as a single item during checked session!

#### Exceptions:

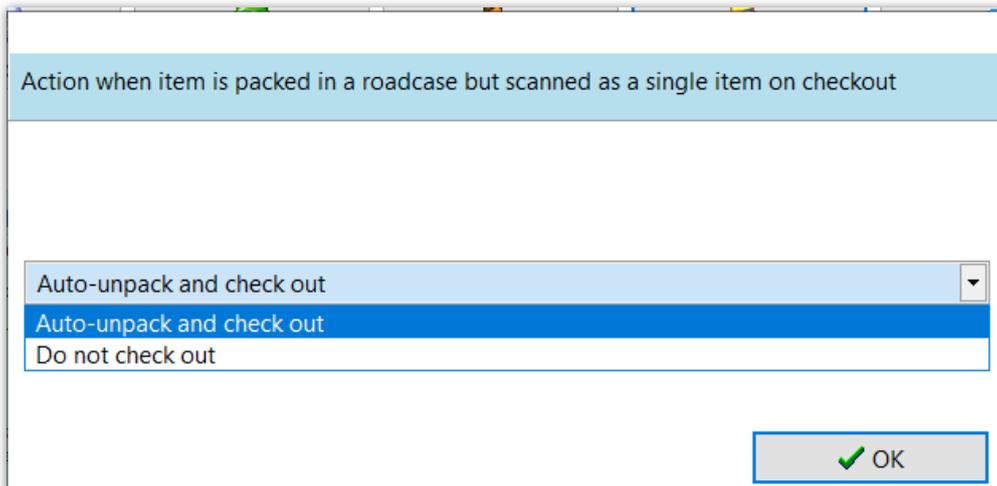
- When RFID is in use, the action is set to 'Do not check out' to ensure that scans of single items by the reader don't unpack the roadcase

- This parameter does not affect racks

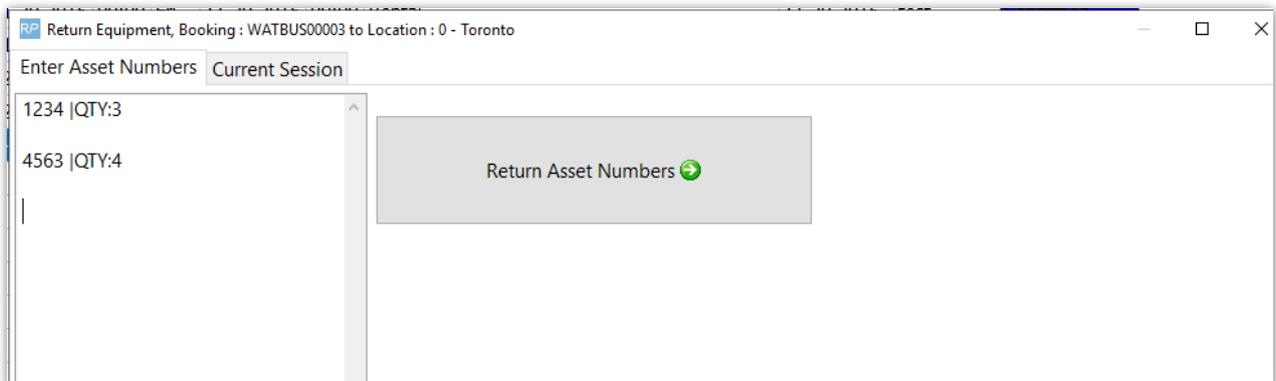
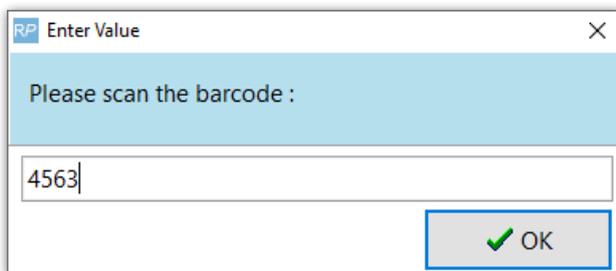
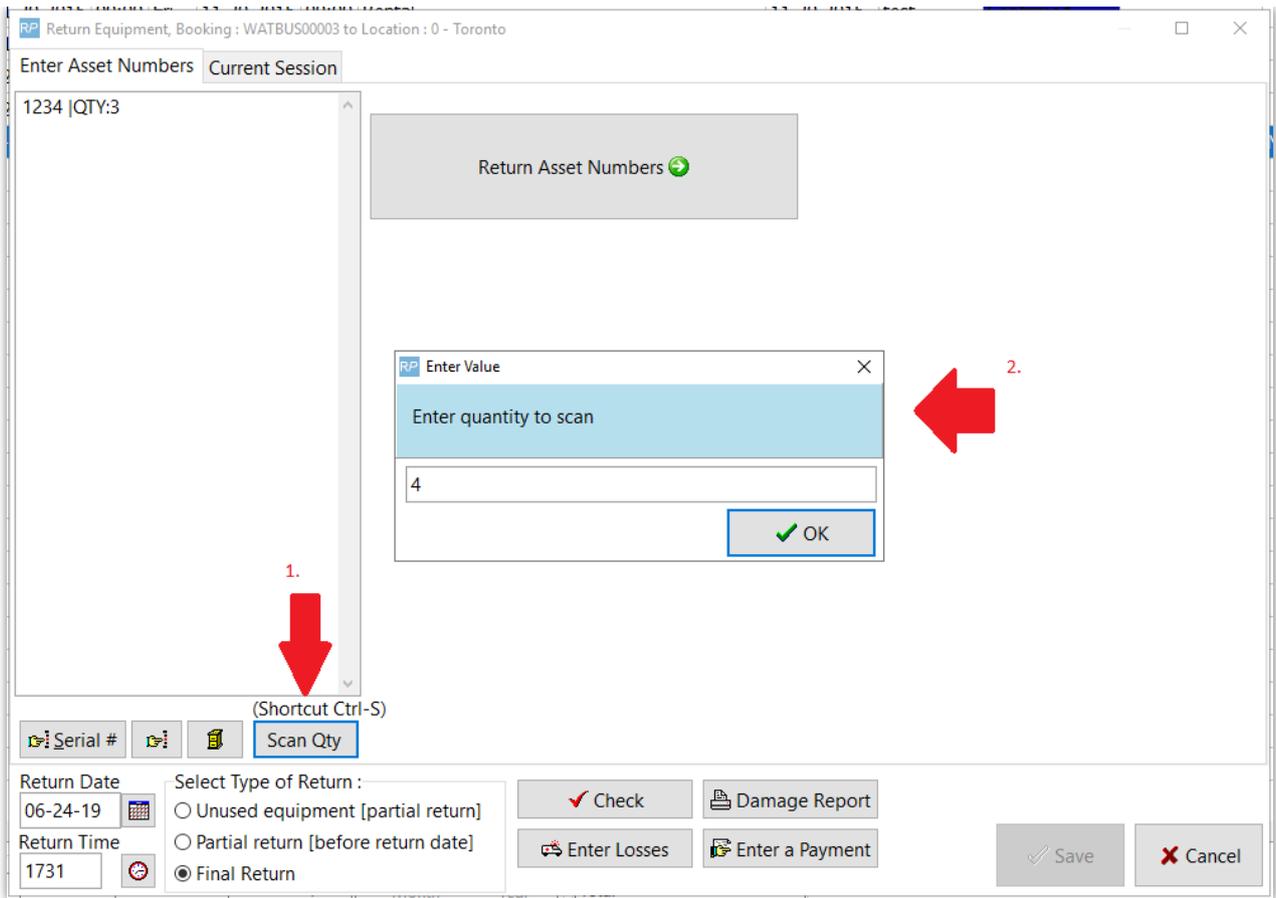
Goto Setup-->Parameters-->Barcode Tracking-->44



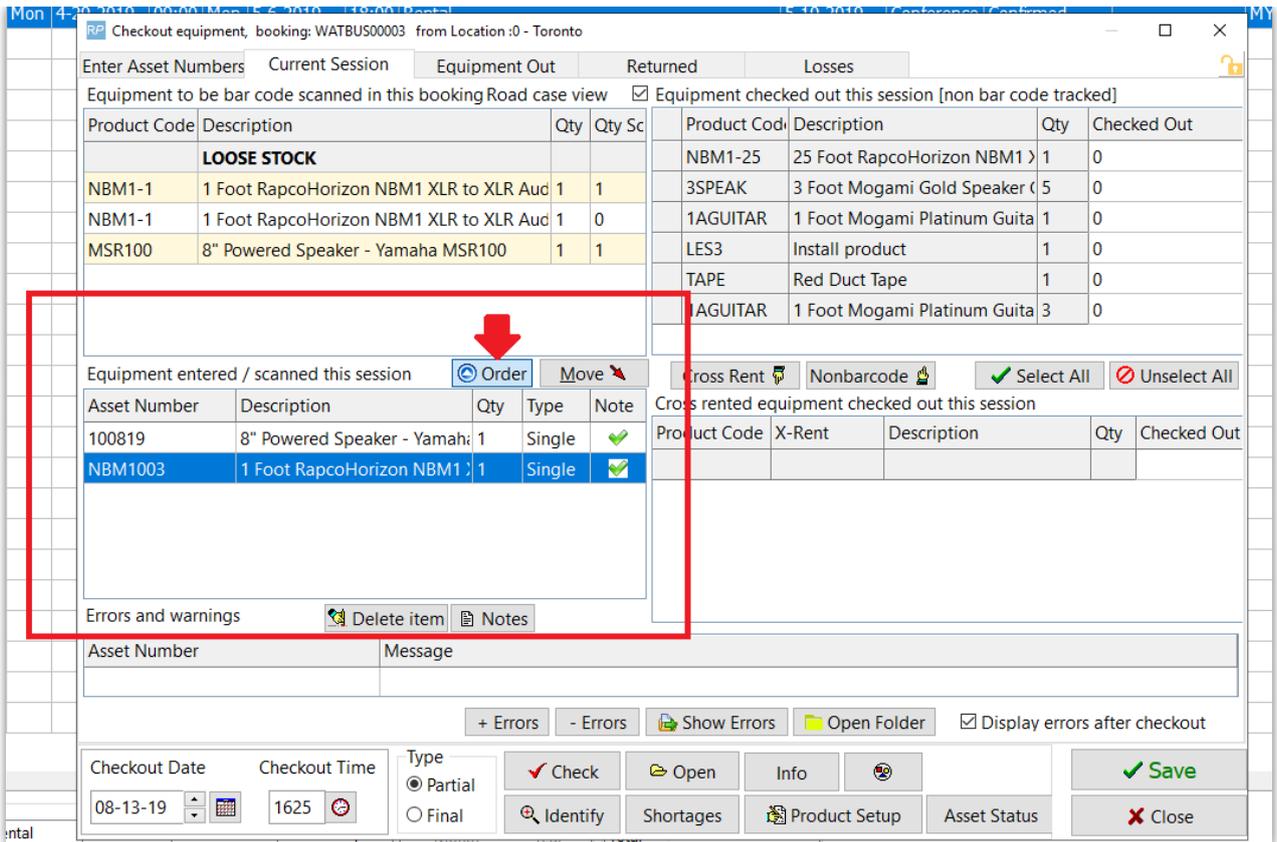
- Auto-unpack and check out: when an item that is packed in a roadcase is scanned as a single item, it is unpacked from the roadcase and checked out
- Do not check out: Shows an error message and prevents the roadcase item from being checked out



Ability to scan multiple non-barcode tracked items in return window



## Change Display Order of Items Scanned at Checkout



## New Options in Resolve Discrepancy Window

[Click here for more information]

## Open Return/Scan Assets to Change Location

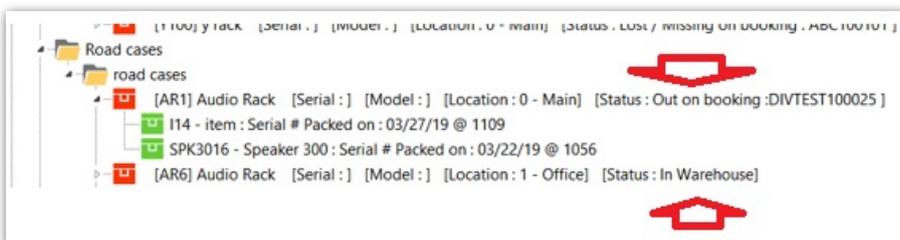
[See Section 7.1 of Help Doc]

## Return of Lost/'Written Off' Equipment

<See Section 9 of document at this link>

## Racks & Roadcases <full rack documentation>

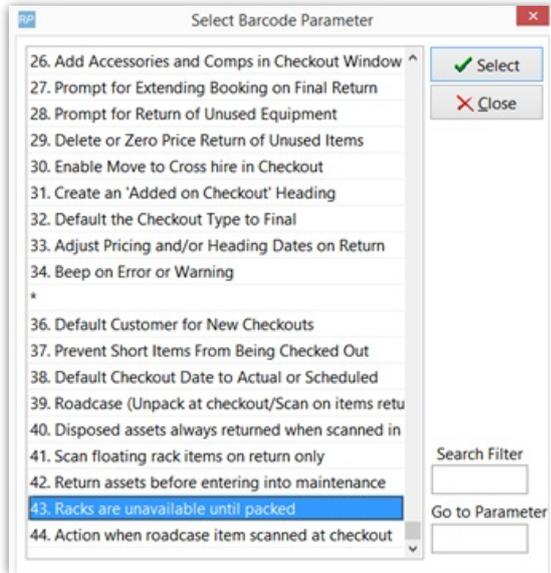
## Rack/Roadcase Asset Status now shows in Inventory Setup



## Racks can be made unavailable for rental until they are packed

<See full rack documentation >

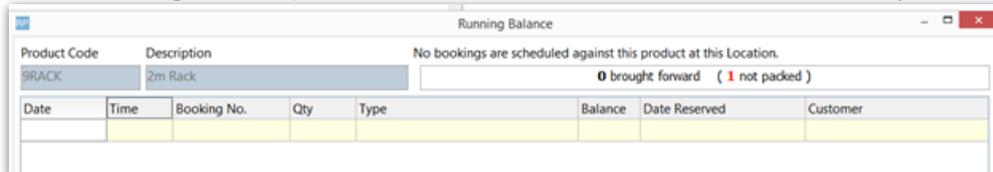
Enable barcode parameter #43 so that empty racks will not show as available for rental.



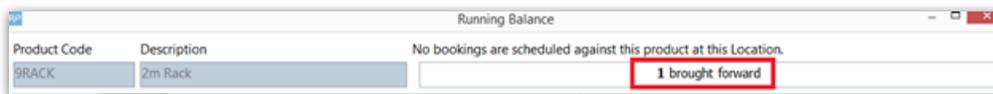
Here a new rack has been added, but is not yet packed



In the running balance, the initial stock shows as 0 with the total not packed displayed in red.



After packing some items into the rack the running balance now displays the rack as being in stock and available for rentals.



The rack will again be removed from available stock when it is unpacked.

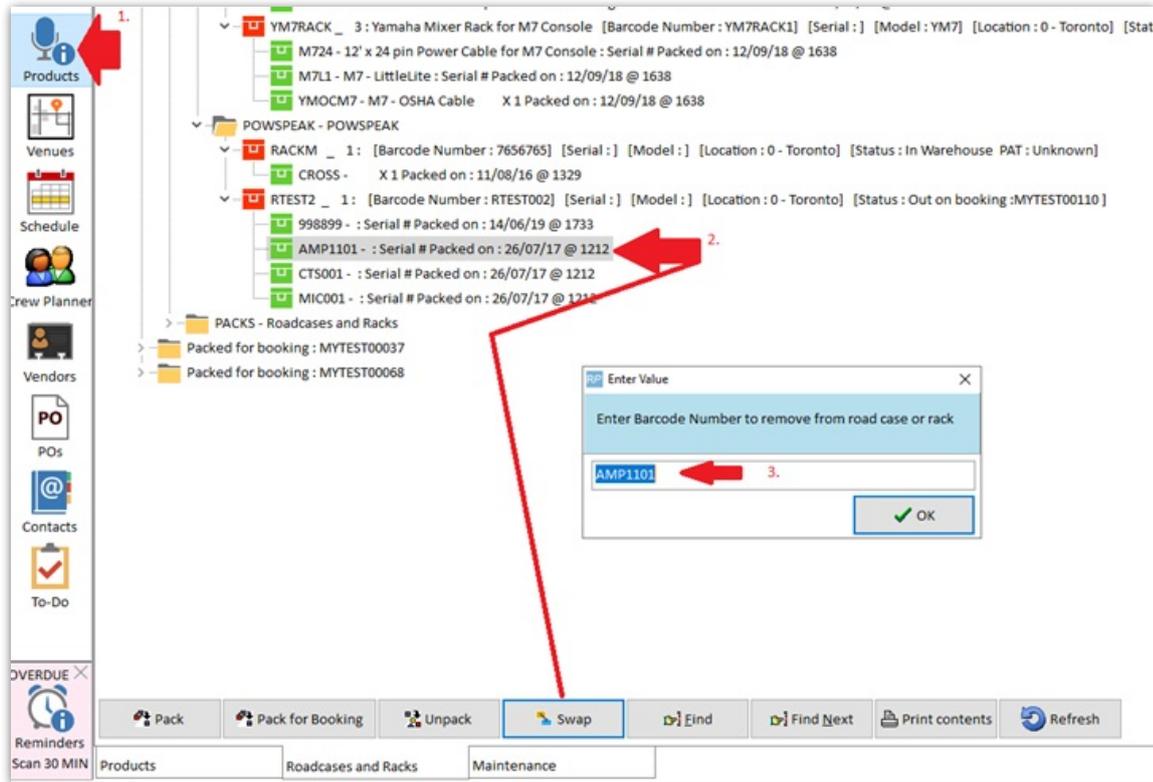
## Swap damaged rack items while rack is checked out

<See full rack documentation>

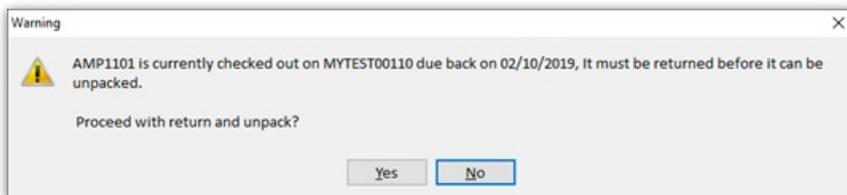
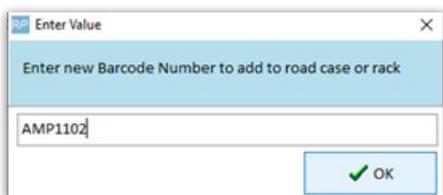
If an item in a rack or road case needs to be swapped with another due to fault or damage, use

the **swap** option on the **Roadcases and Racks** tab. This option can be used even if the rack is checked out to a booking

1. Go to the Products Menu, Roadcases and Racks tab
2. Click **Swap** (or find the asset in the tree and then click the swap button)
3. The first prompt will ask for the item to be unpacked and replaced. If you've selected an asset in the tree, the barcode will be filled in for you.



The second prompt will ask for the replacement barcode of the asset to be added to the rack.



#### **Barcoding parameter #42 'Return assets before entering into maintenance'**

- TRUE - the asset will be returned before it is unpacked.
- FALSE - the asset will not be returned, instead it will be flagged for automatic entry to maintenance when the asset is scanned in the return window [<more details>](#)

Enter a maintenance record for the faulty asset when prompted

Note the asset swapped out in the packed rack



Exceptions:

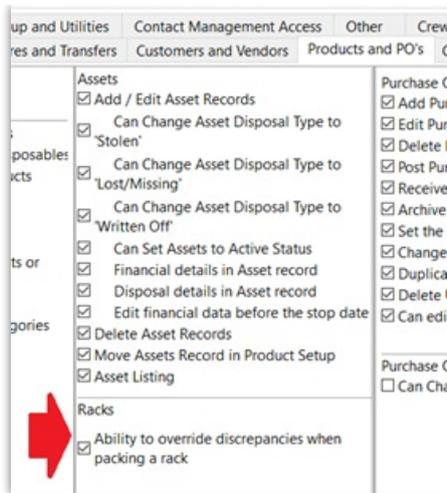
- If the original asset has a sold/disposed status it will be unpacked but not returned.
- If the new asset is sold/disposed the swap will not be allowed
- If both the original and new asset are out on the same booking the old asset will be returned (as needed) but the new asset will remain on the booking so it can be scanned in when the road case/rack is returned.
- If the asset needs to be returned before it can be unpacked (see barcoding #42) then the operator must have rights to return a booking in order to use the swap when the asset is currently out.

## Ability to override discrepancies when packing a Rack

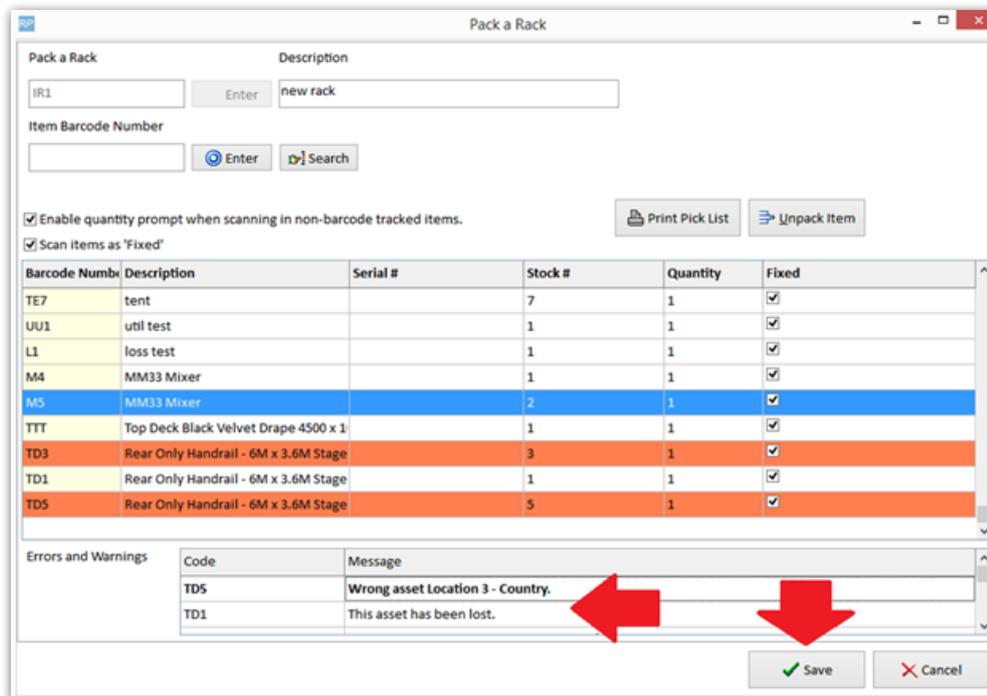
[<See full rack documentation>](#)

When packing road cases or racks, some assets may have errors or warnings that should be resolved before being packed. Enabling the 'Ability to override discrepancies when packing a rack' operator privilege, will allow the user an option to resolve discrepancies during the packing process.

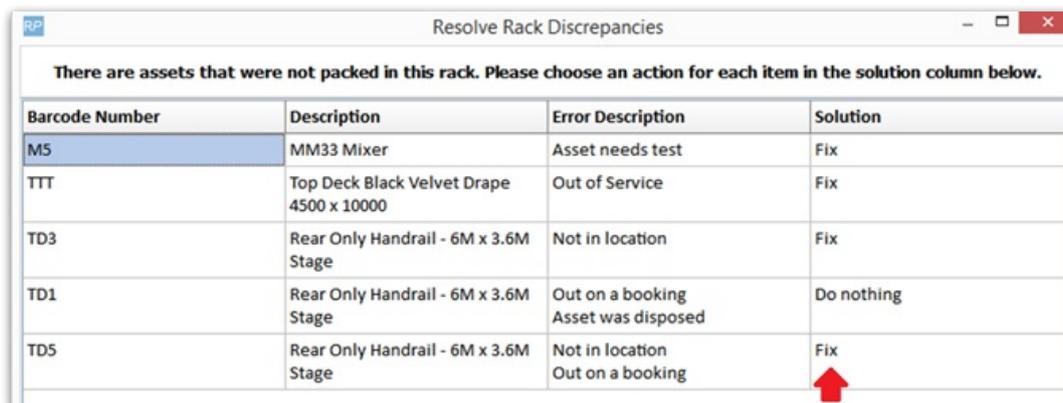
Access the operator privilege on the Products and PO's tab of the Operator Group or contact your system administrator for access.



Errors and warnings that show up during the packing process will have an option to resolve on SAVE.



Any errors or warnings that can be resolved will be listed. Select the action to take in the 'Solution' column. When 'Fix' is selected the error will be resolved (for instance an asset in maintenance will be returned to service, or an asset listed as being at a different warehouse will be moved to the same warehouse as the rack/road case).



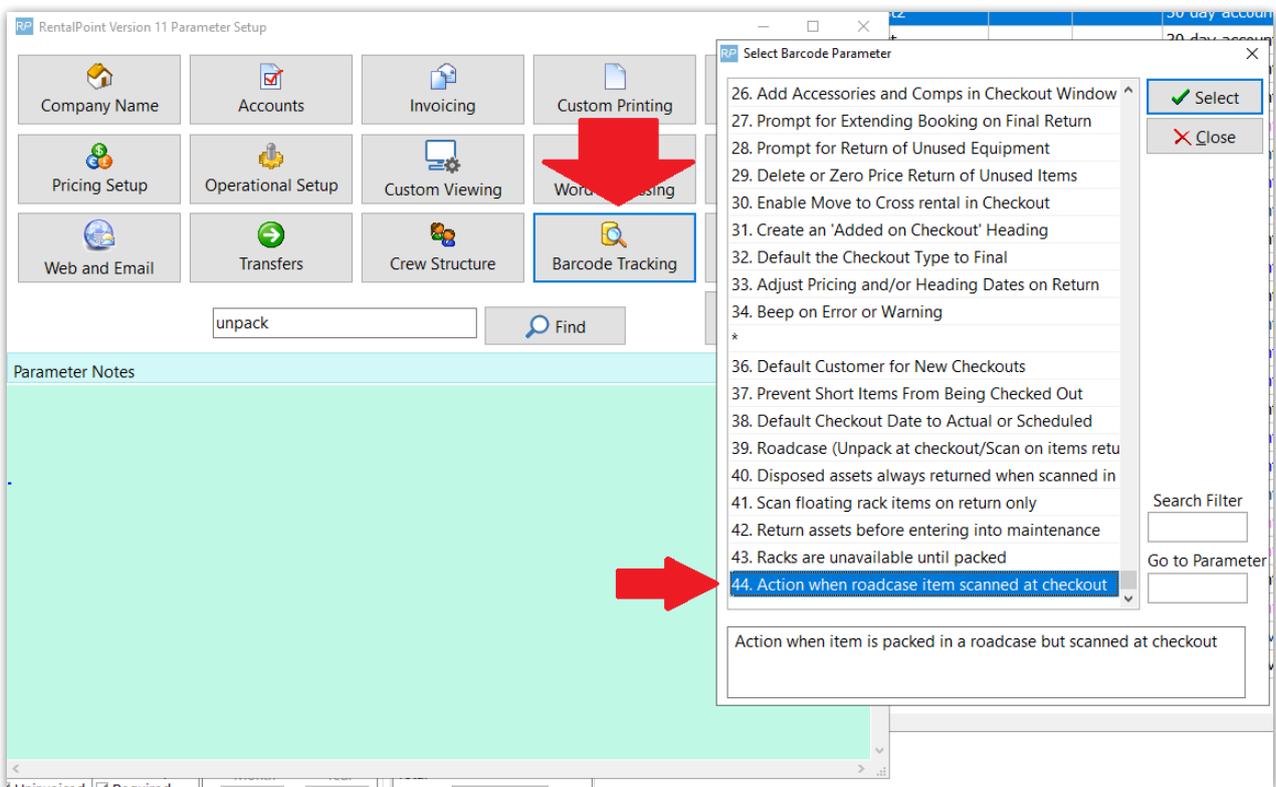
## New Parameter - 'Action when roadcase item scanned at checkout'

Predetermine how RentalPoint should handle items that are packed in a roadcase, but scanned out as a single item during checked session!

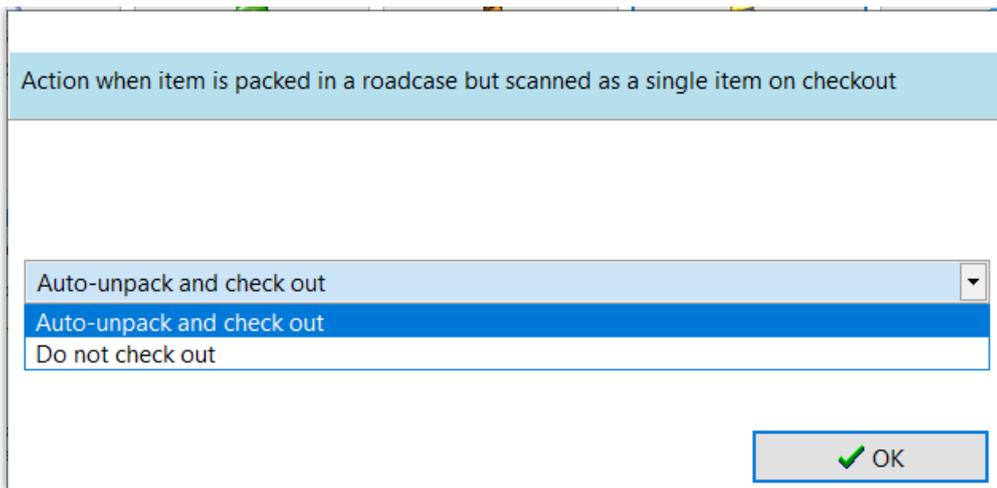
### Exceptions:

- 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



## Road Case View

### In Checkout Window

Road case view in the checkout window allows the list of equipment to be bar code scanned to be listed grouped by road case or rack.

1. Enable the option by clicking the **Road case view** checkbox above the grid.
2. Once enabled the road case or rack product displays in bold and the packed items display under it.
3. If there are additional items packed that haven't yet been placed on the booking these will display in gray italics with a + sign before the product code.
  - o These additional items are only potential additions since at this point an actual roadcase barcode has not been scanned in the checkout window, and it's possible that two road cases of the same product type could be packed differently.
  - o If a road case has been packed specifically for the booking this will be used to determine the items that should be placed under the road case.

RP Checkout equipment, booking: BILLQ200002 from Location :0 - Toronto

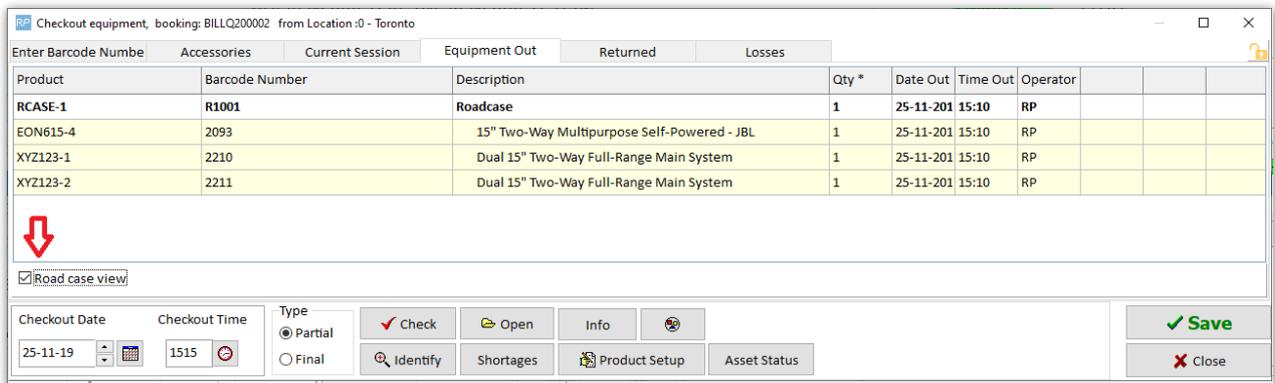
Enter Barcode Number   Accessories   Current Session   **Equipment Out** 1   Returned   L

Equipment to be bar code scanned in this booking   Road case view    Equipment checked

Product Code	Description	Qty	Qty Scanned	Product Code
<b>RCASE</b>	<b>Roadcase</b>	1	0	MYGEAR
XYZ123	Dual 15" Two-Way Full-Range Main System	2	0	
<i>+EON615</i>	<i>15" Two-Way Multipurpose Self-Powered - JBL</i>	1	0	
	<b>LOOSE STOCK</b>			
NBM1-1	1 Foot RapcoHorizon NBM1 XLR to XLR Audio Patch Ca	1	0	

Equipment entered / scanned this session   Order   Move   Cross Rent

Once items have been scanned out the **Equipment Out** and **Returned** grids can also display the items in road case order by enabling the **Road case view** option. This can be viewed by opening the check out window or using **View Checkout Session Information** from the **View** menu.



### Return Window...



### RoadCase Items Added at Checkout

Items that are part of a Roadcase when added at checkout, will be added to the RoadCase on the equipment grid of the booking instead of under an 'added at checkout' heading

