V12 New Features

Last Modified on 03/06/2022 11:51 am EDT

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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

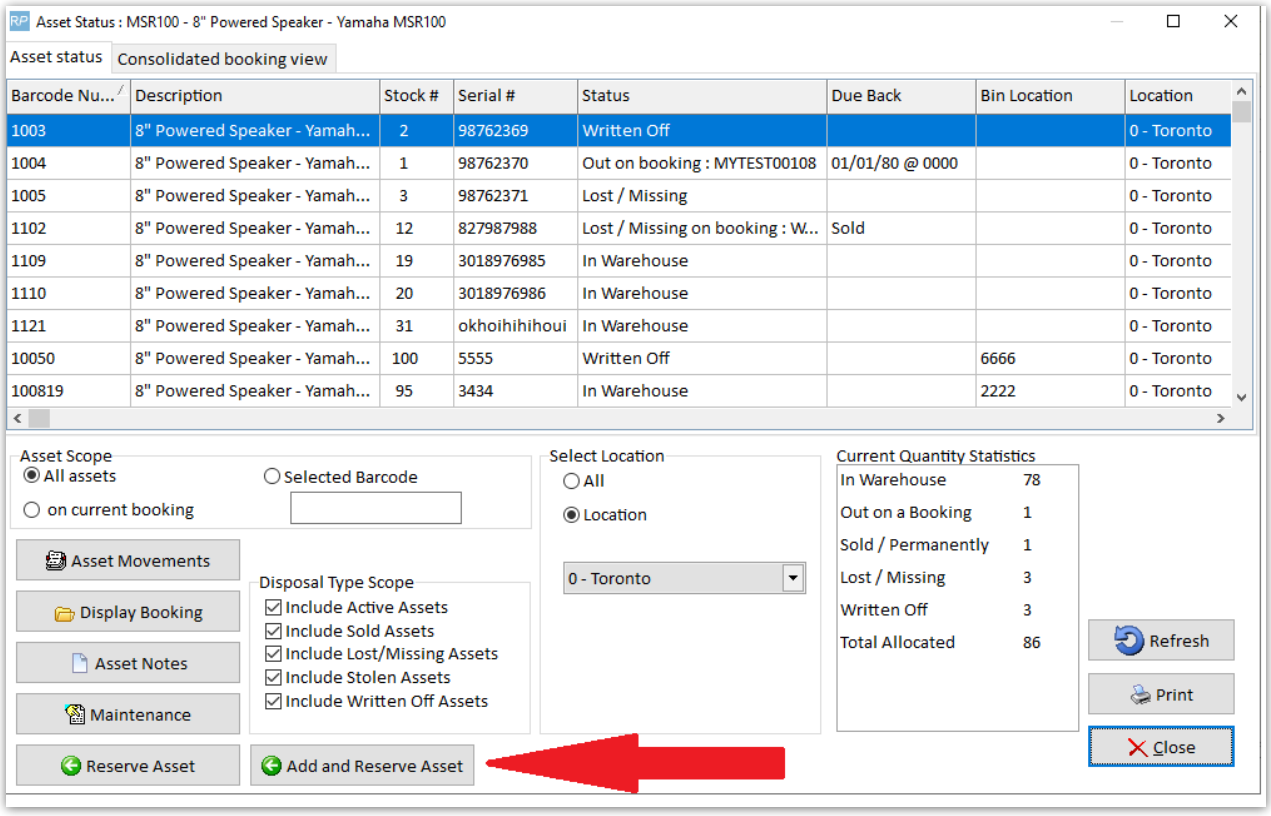
- Prompt clients and prospects to sign-off on proposals online. Receive and display e-signatures in RentalPoint. <more information>

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>

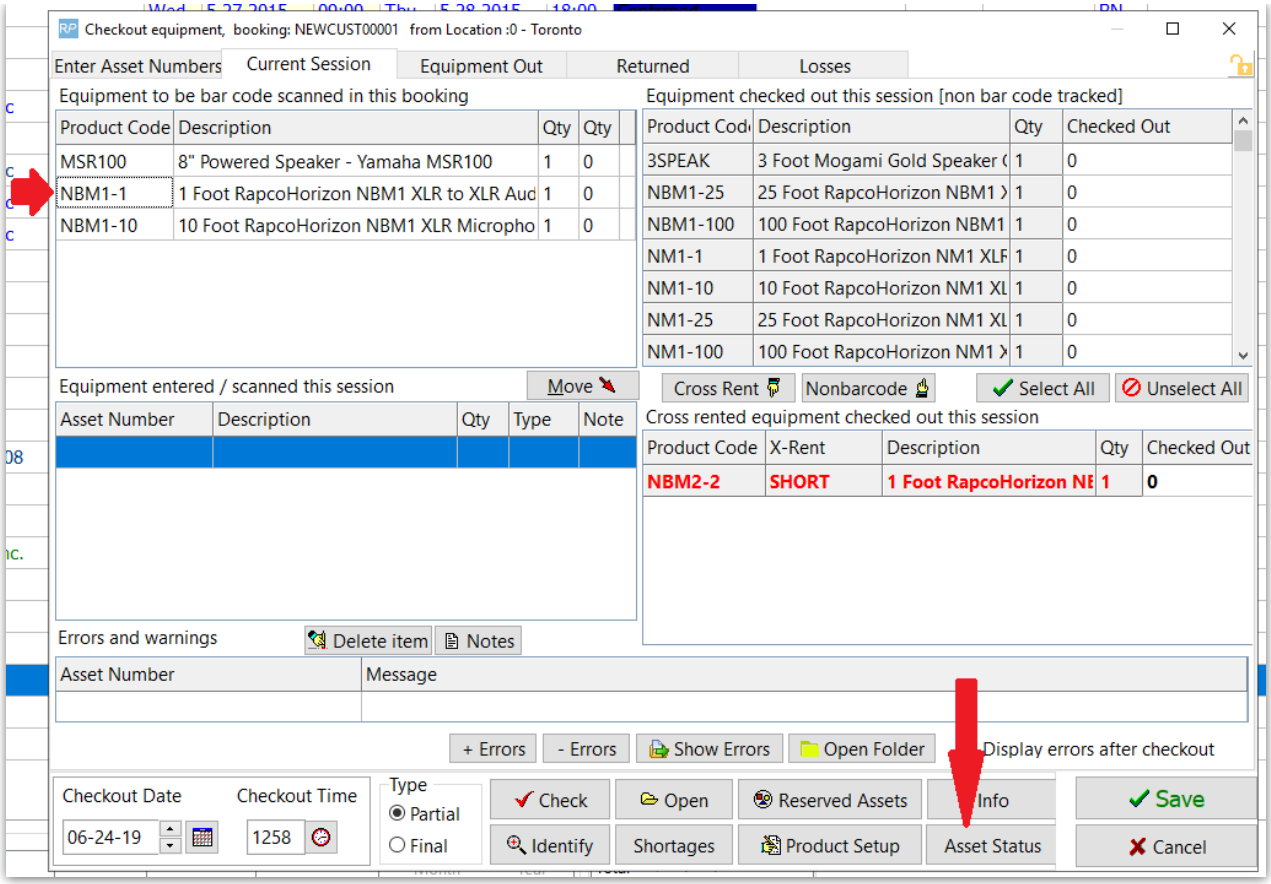
Asset Reservations

New options to Reserve Assets from within the Asset Status Window



- <full documentation on how to reserve assets>

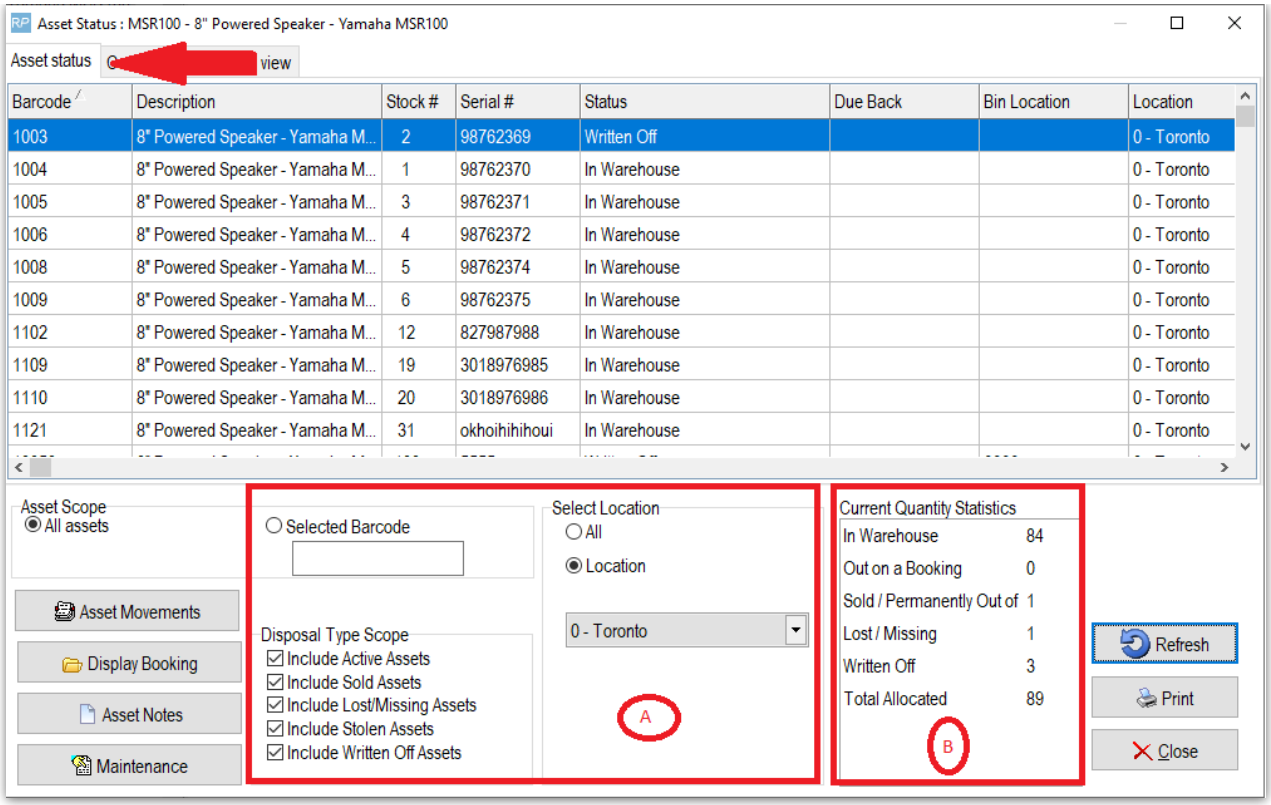
Asset Status now available in checkout window so as to quickly identify asset allocation and availability



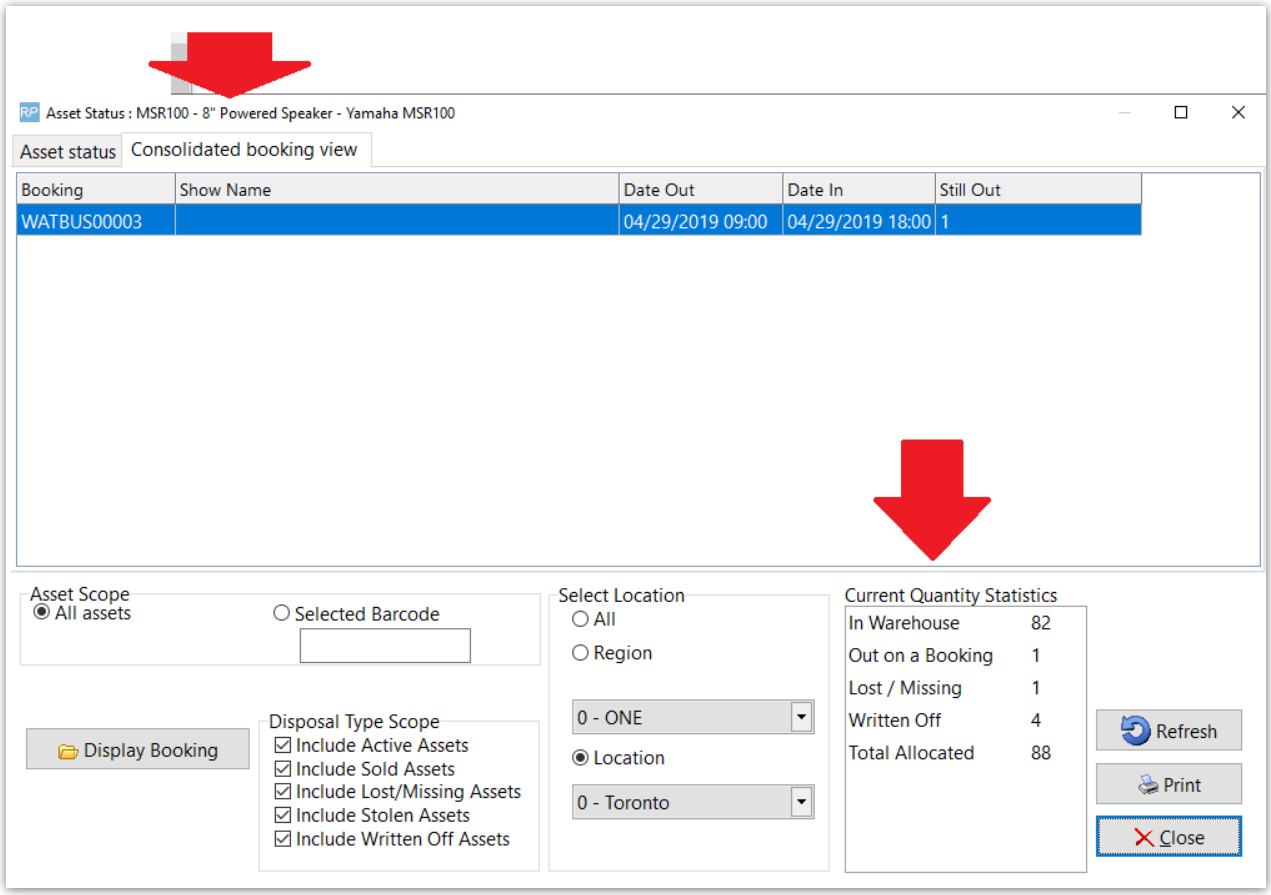
Consolidated Asset Status View

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.



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.



- <Full Documentation>

General

New Booking Grid Search

- <More details here>

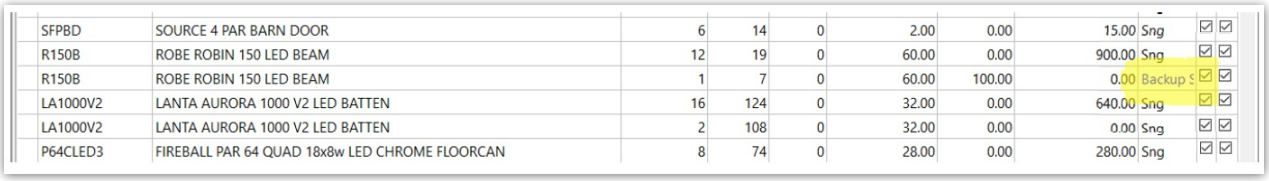
New Insert Field to Identify Backup Equipment

[More Information on Insert fields here]

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

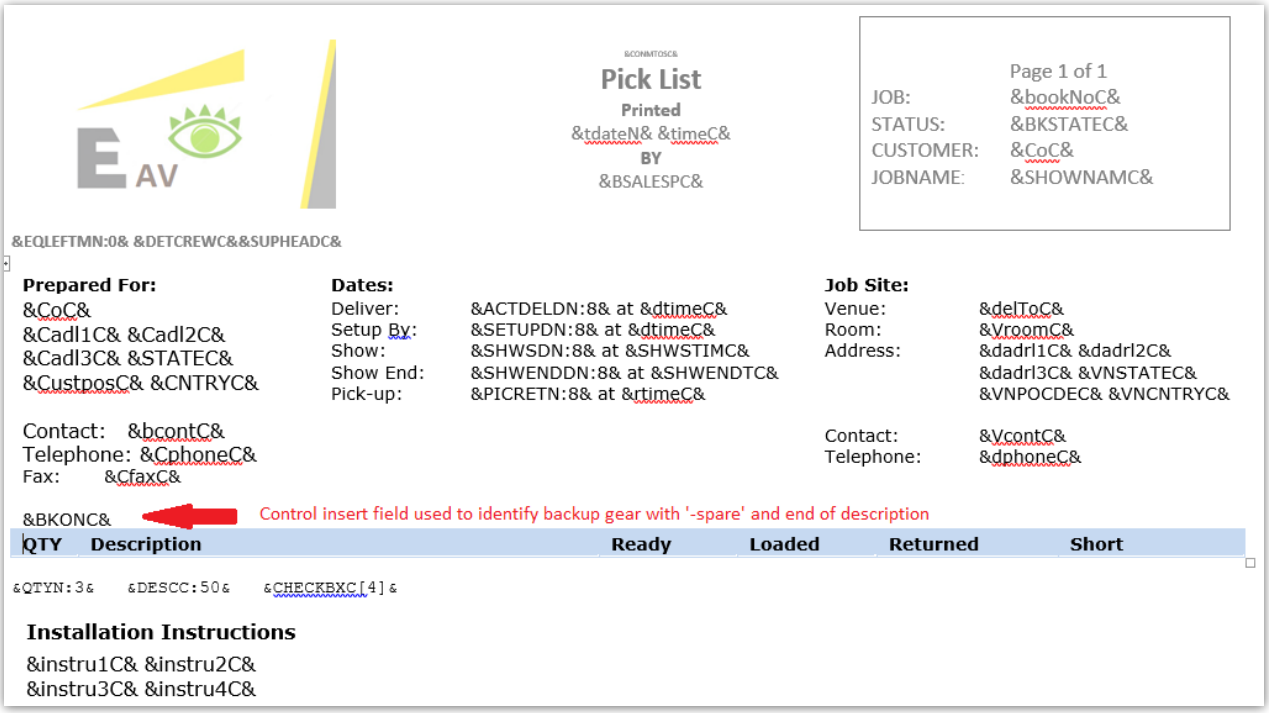
Example:

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	
R150B	ROBE ROBIN 150 LED BEAM	12	19	0	60.00	0.00	900.00	Sng	
R150B	ROBE ROBIN 150 LED BEAM	1	7	0	60.00	100.00	0.00	Backup S	
LA1000V2	LANTA AURORA 1000 V2 LED BATTEN	16	124	0	32.00	0.00	640.00	Sng	
LA1000V2	LANTA AURORA 1000 V2 LED BATTEN	2	108	0	32.00	0.00	0.00	Sng	
P64CLED3	FIREBALL PAR 64 QUAD 18x8w LED CHROME FLOORCAN	8	74	0	28.00	0.00	280.00	Sng	

RTF Template



&CONMTOSC&

Pick List

Printed
&tdateN& &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 &dtimeC&
Setup By: &SETUPDN:8& at &dtimeC&
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]&			

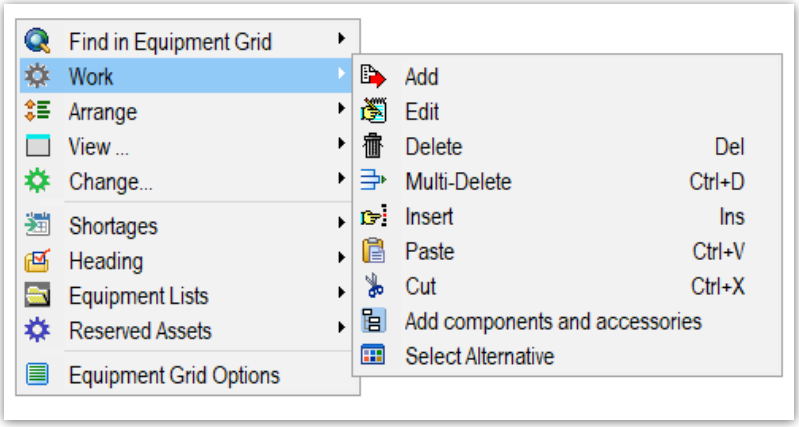
Installation Instructions
&instru1C& &instru2C&
&instru3C& &instru4C&

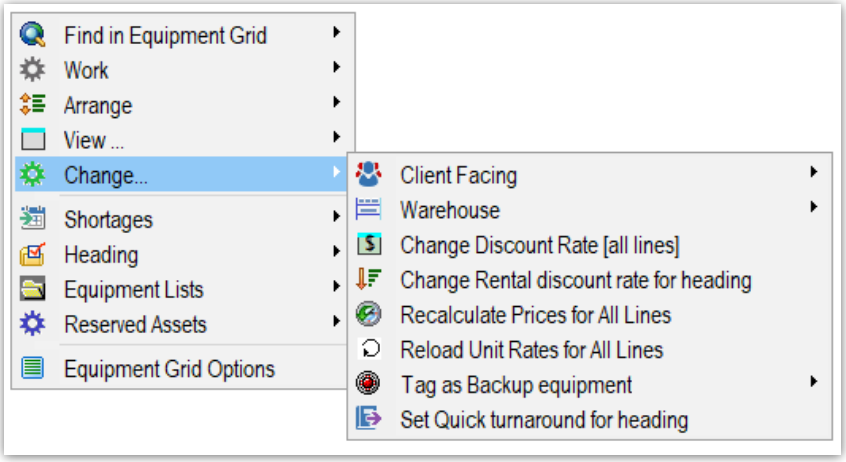
Output Doc

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.

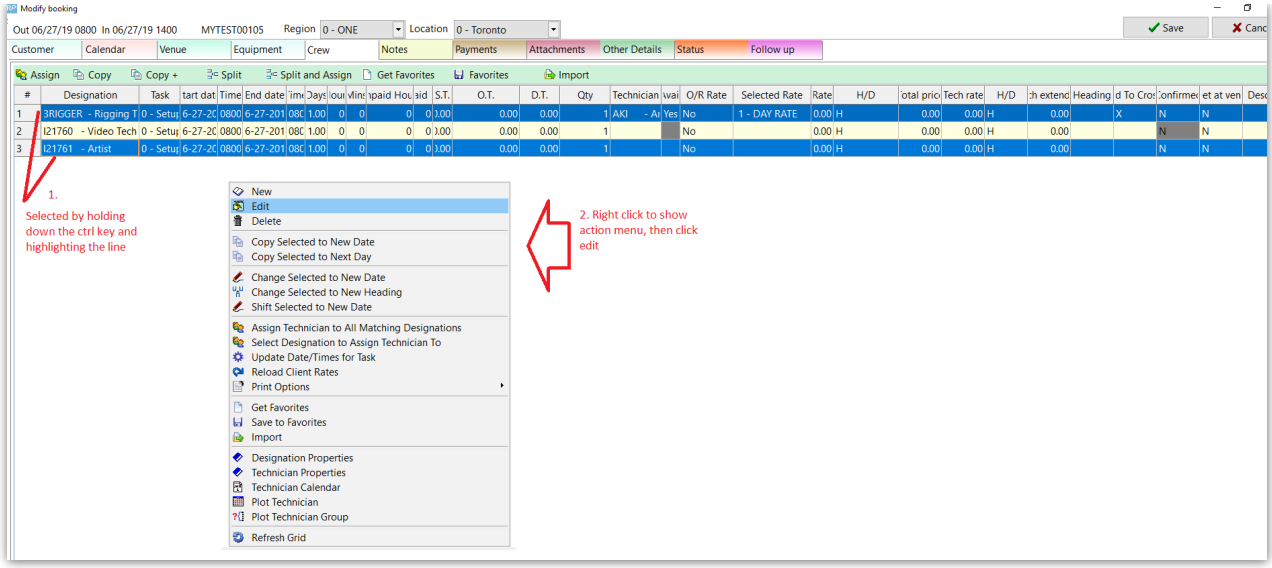




Multi-Edit Labour Entries

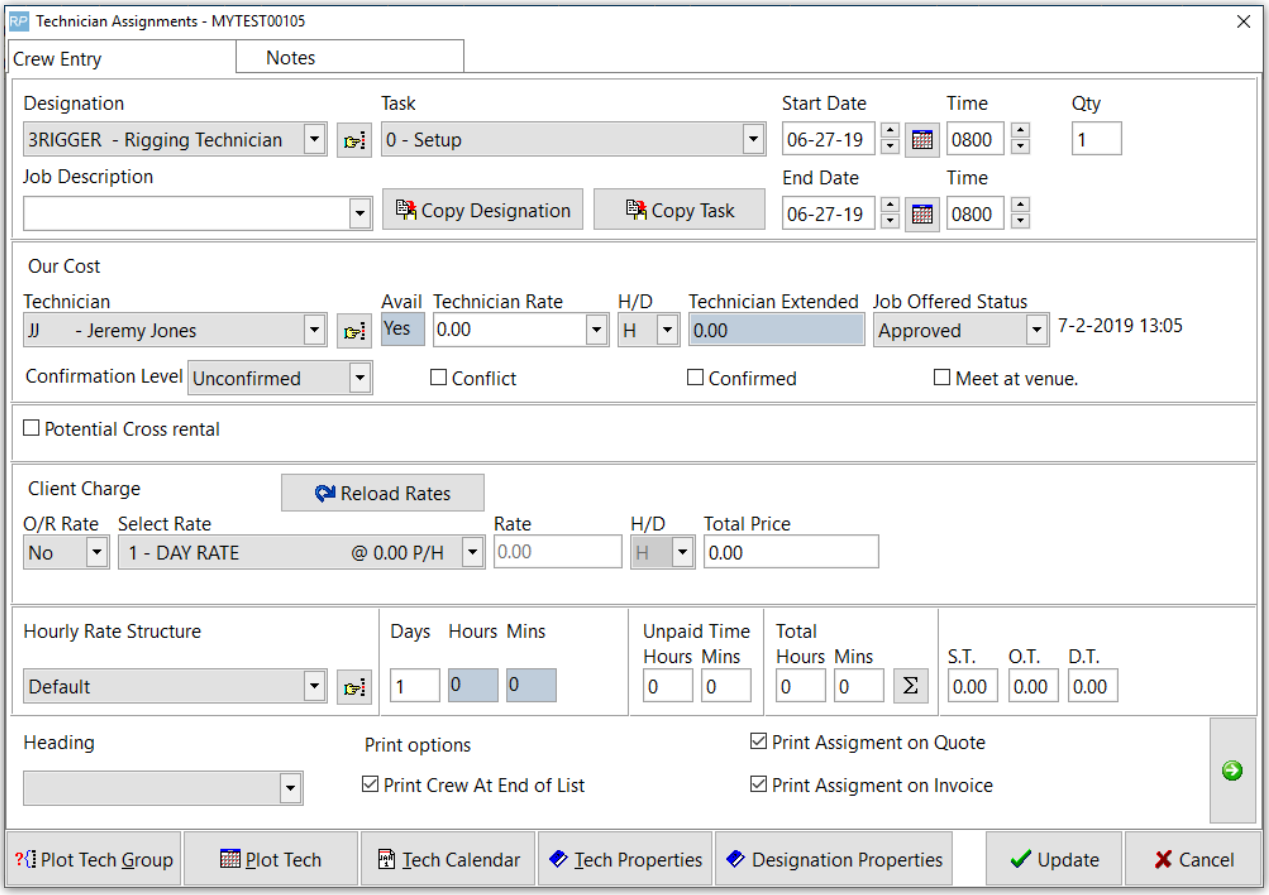
The same technician can be assigned to multiple shifts at the same time using the multi-edit feature!

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

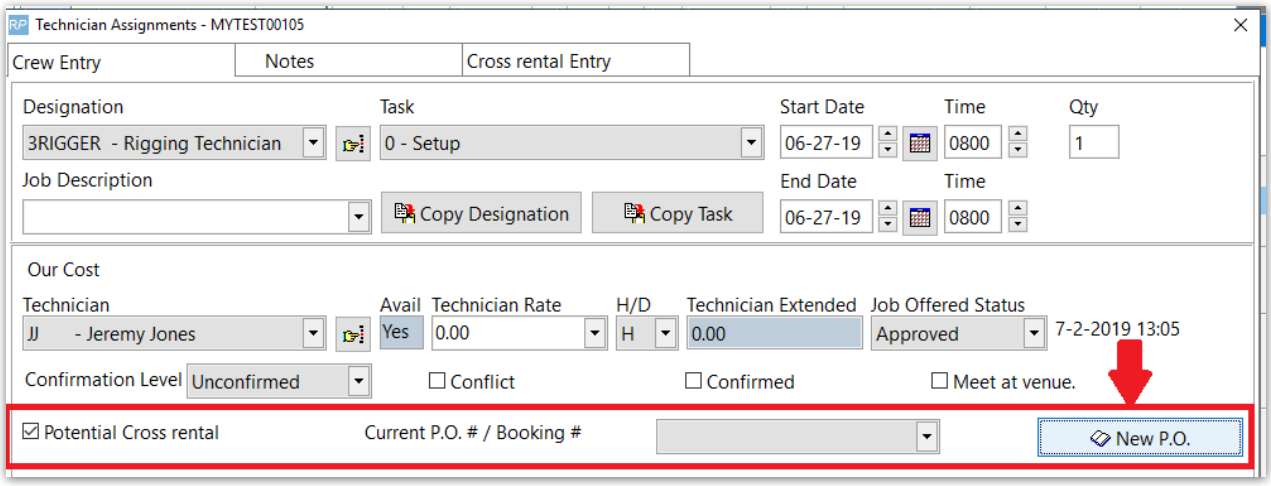


Click **Edit** and the properties for the first selected technician assignment will display.

- 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.

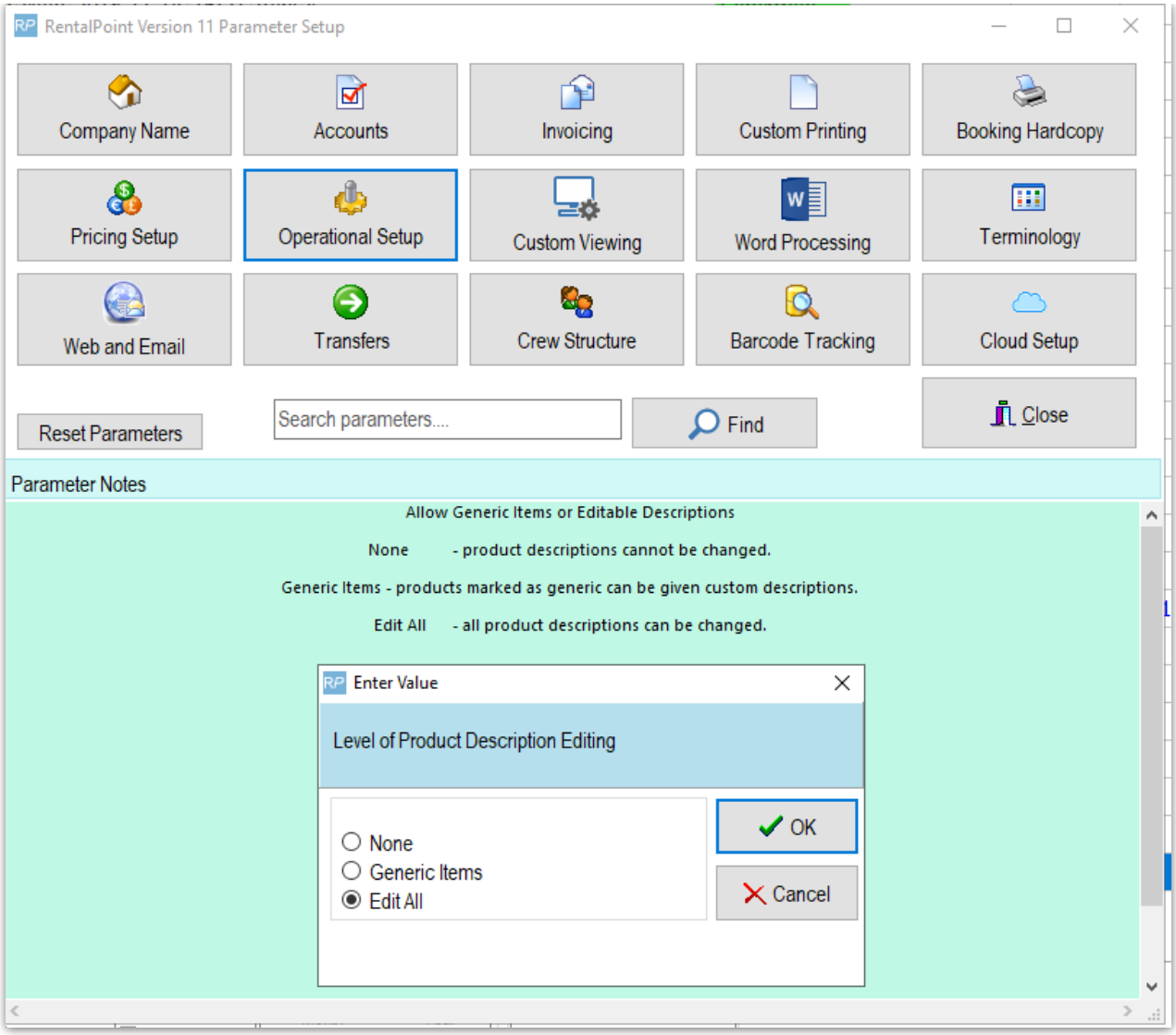


Note: Where a P.O is entered during a multi-edit session, the PO details are applied to all qualified entries

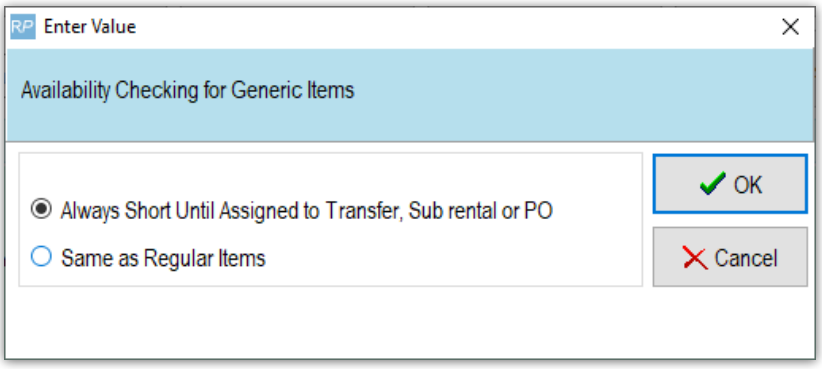


Generic Items

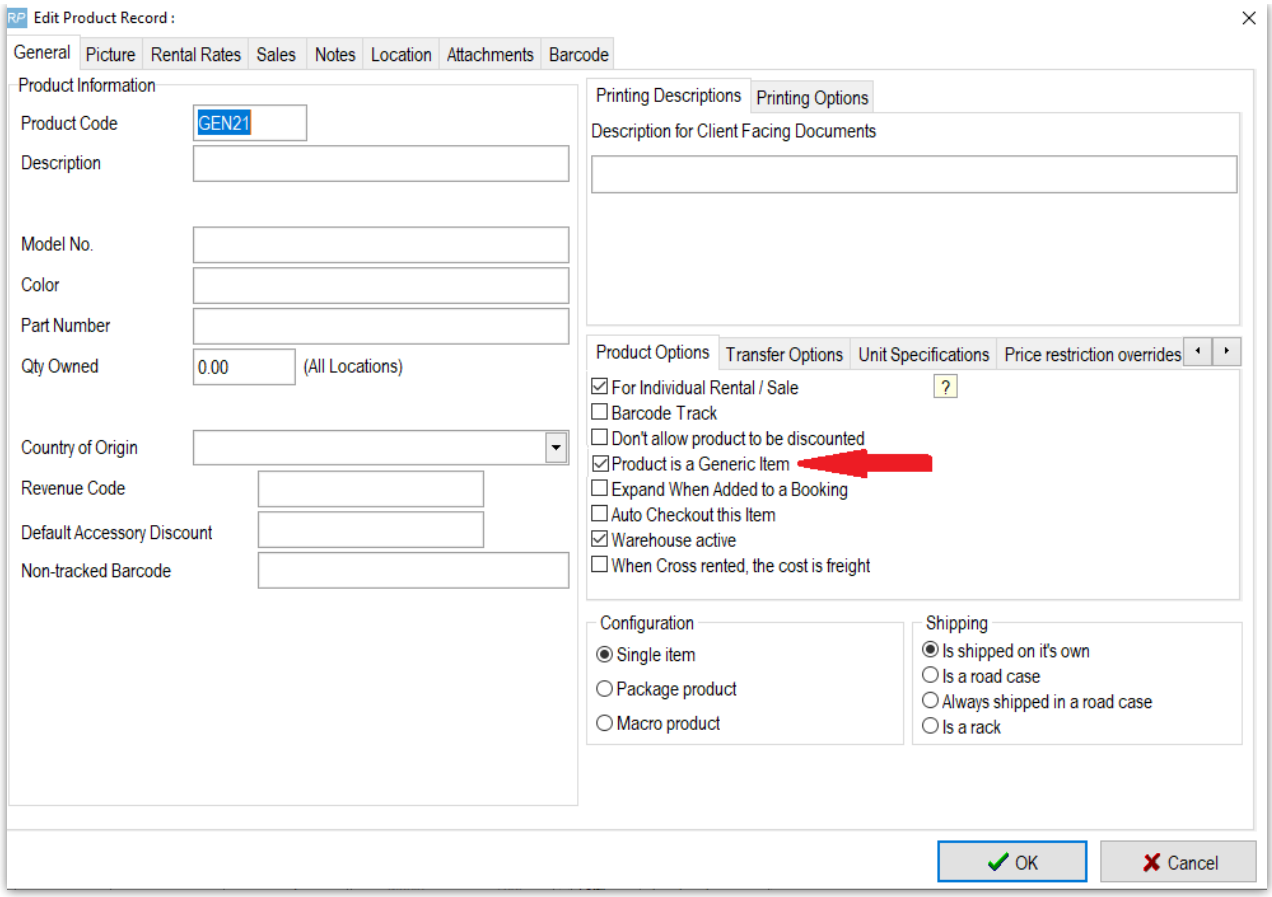
Systems with Operational parameter #127 'Allow Generic Items or Editable Descriptions' set to 'Edit All' can now use generic item and the settings applicable to those products.



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

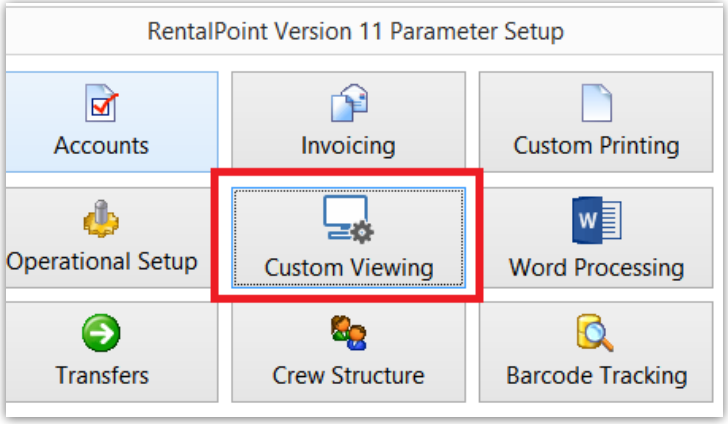


Note: Generic items are identified in Product Setup

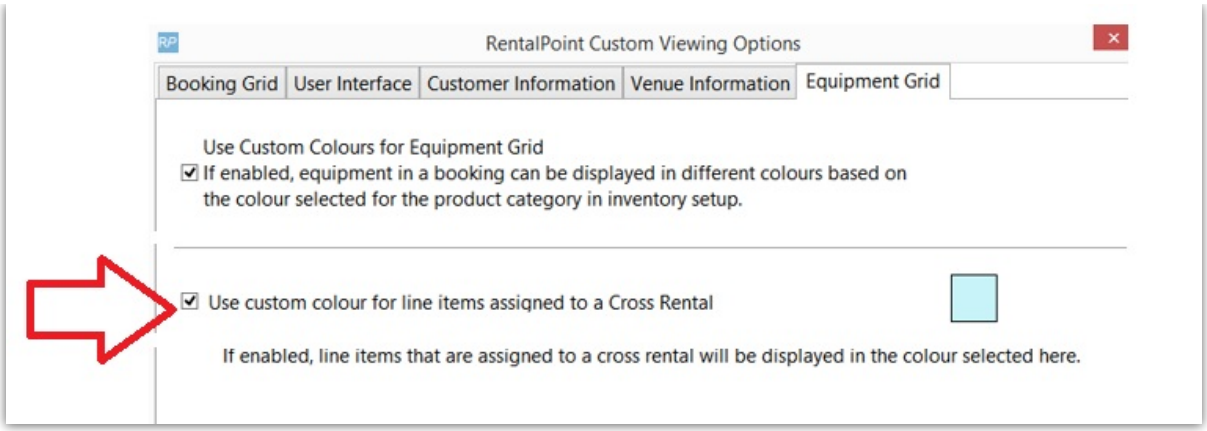


Custom Colours for Assigned Cross Rentals

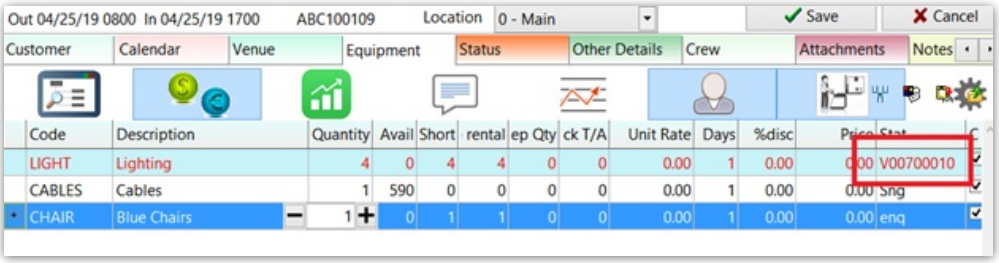
Goto Setup-->Parameters off the main RentalPoint menu, then click 'Custom Viewing'



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



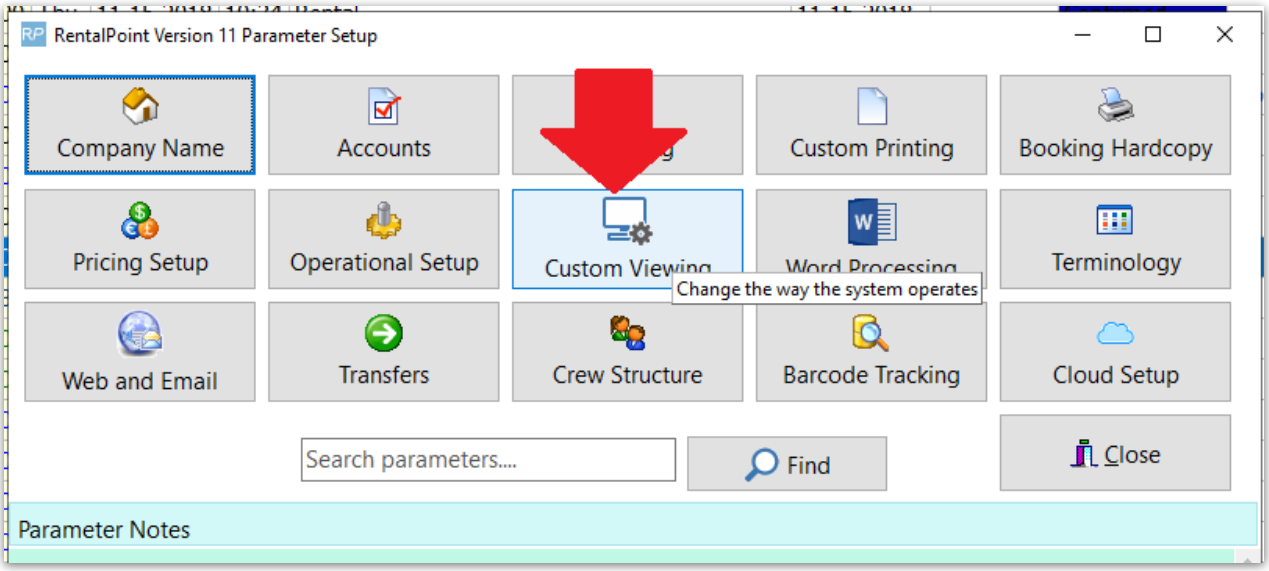
Below is a sample of how a line item with an assigned cross rental would display on the equipment grid of a booking, based on the colour settings in 'Custom Viewing' Equipment Grid Parameters



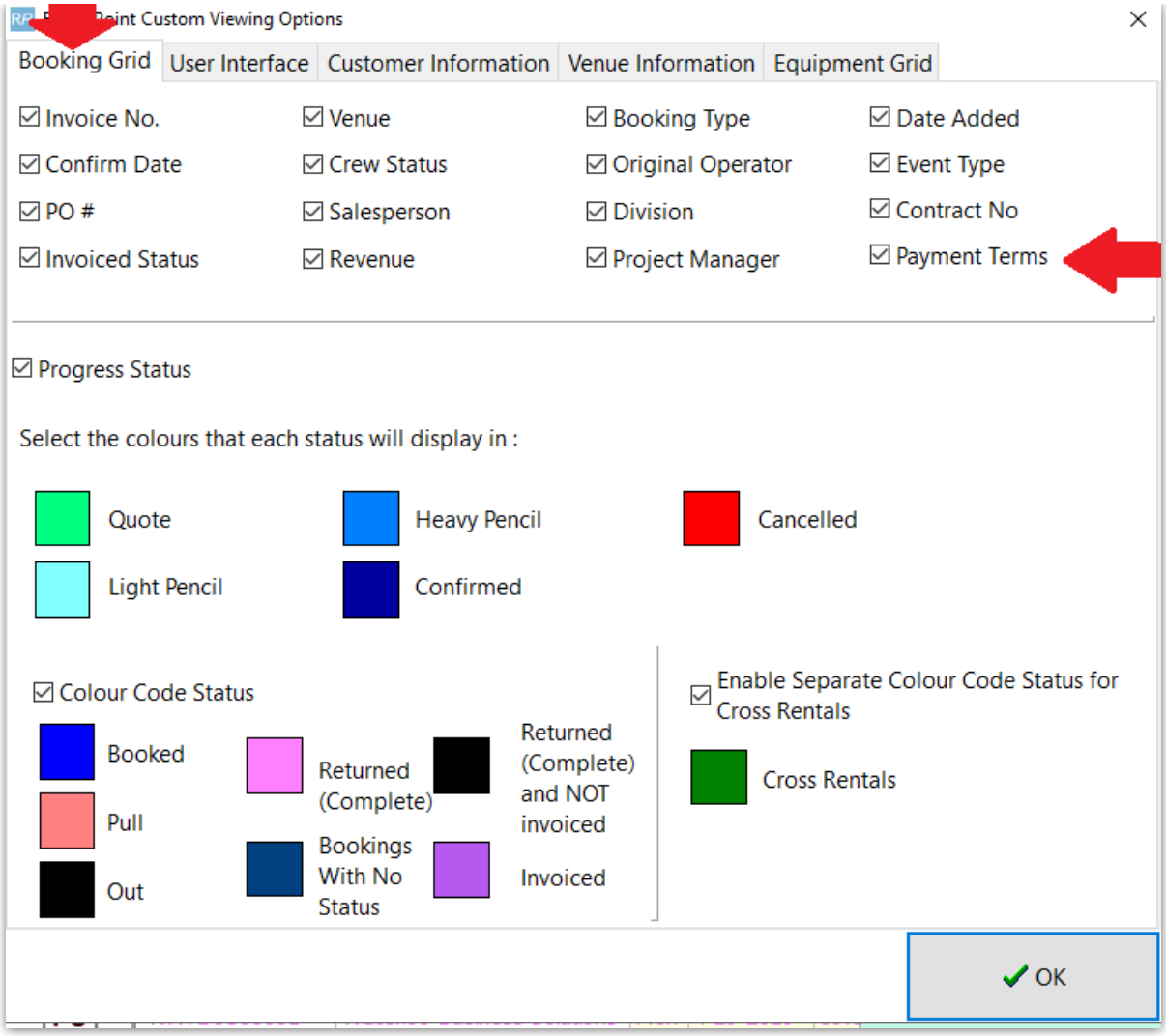
Payment Terms now visible on Booking Grid

[Full details on Booking Grid here]

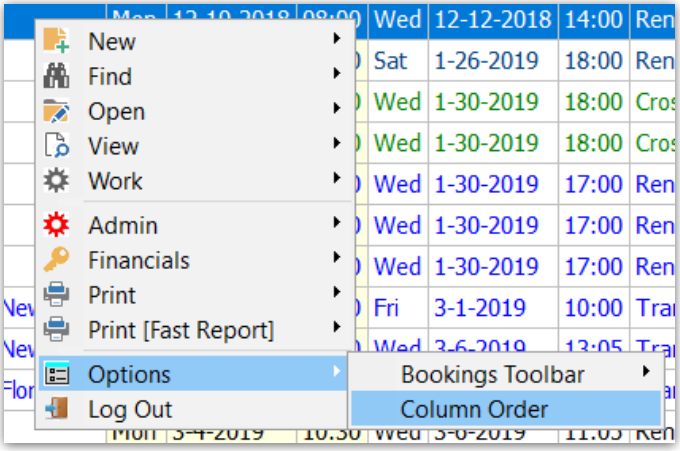
Goto Setup-->Parameters-->Custom Viewing



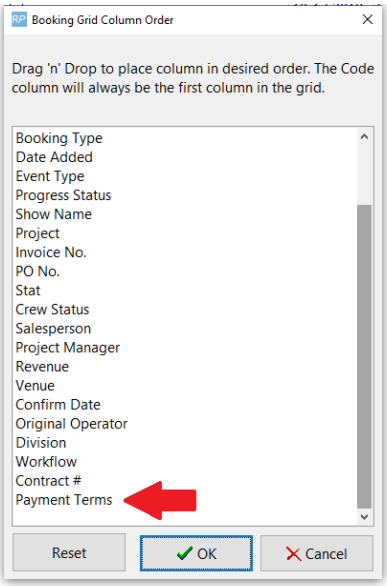
Check the Box for Payment Terms



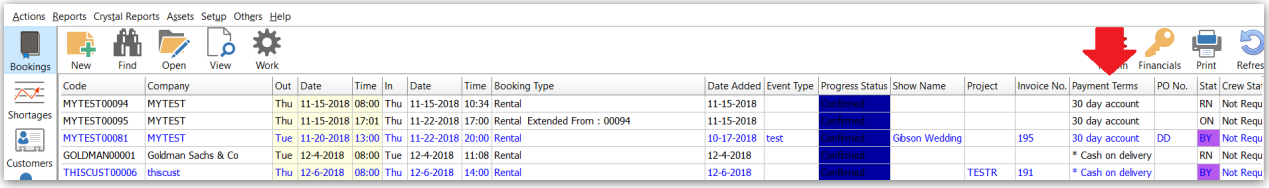
Right Click on the booking Grid-->Options-->Column Order



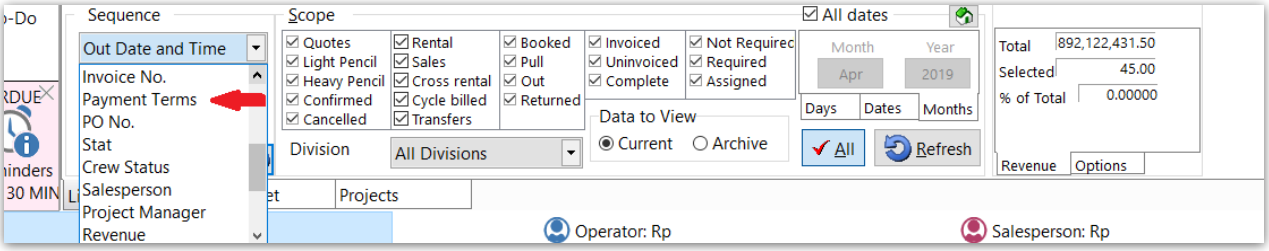
Drag and drop the Payment Terms column to desired order for the grid



See Payment Terms Column on Booking Grid



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>

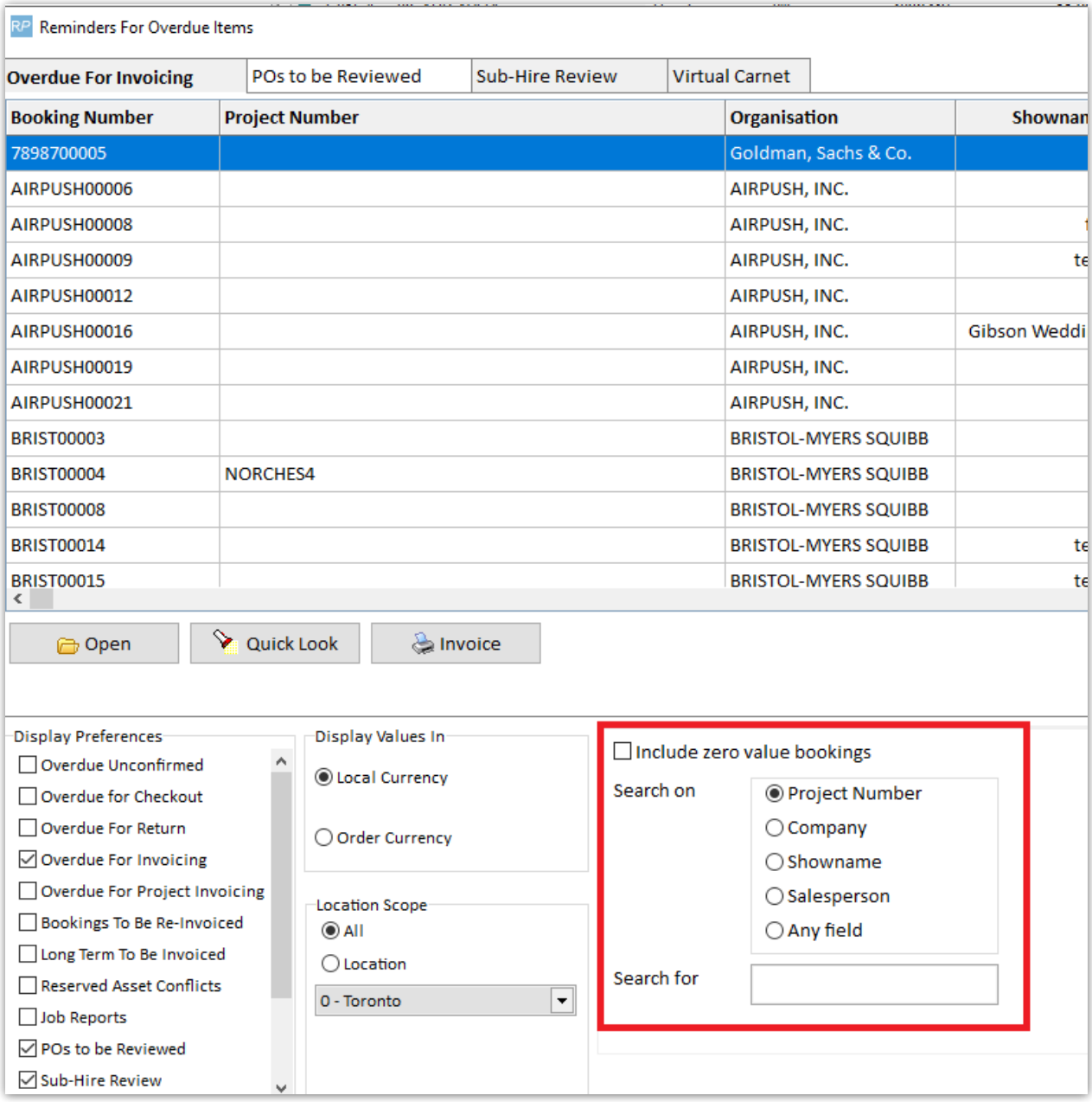
New Auto-email Settings

- 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:

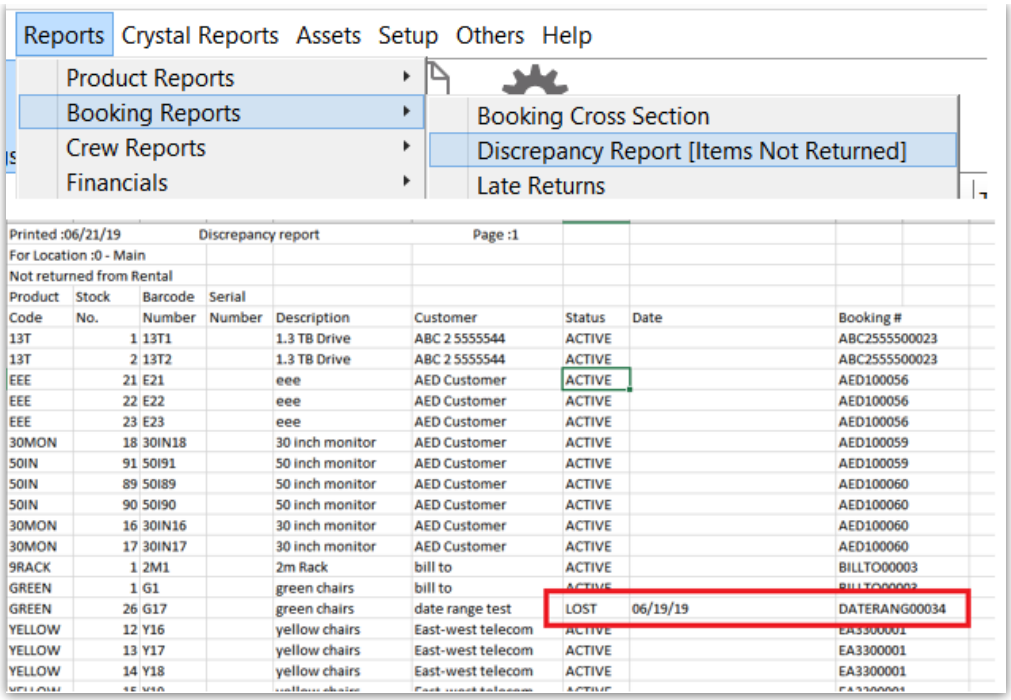
- **Include zero value bookings:** will show or hide bookings with zero values that may not need to be invoiced
- **Search On:** Allows for search scope on a specific field or all fields



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.

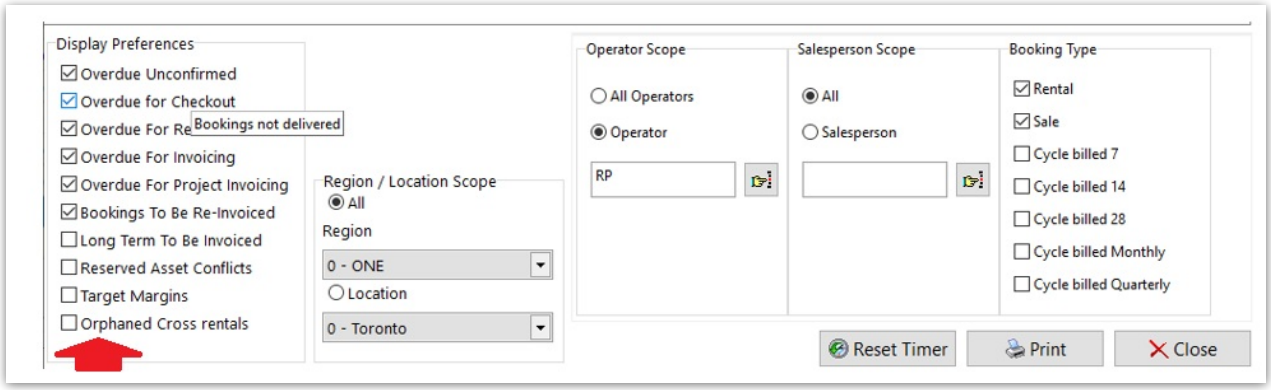


Printed :06/21/19 Discrepancy report Page :1
For Location :0 - Main
Not returned from Rental

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

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



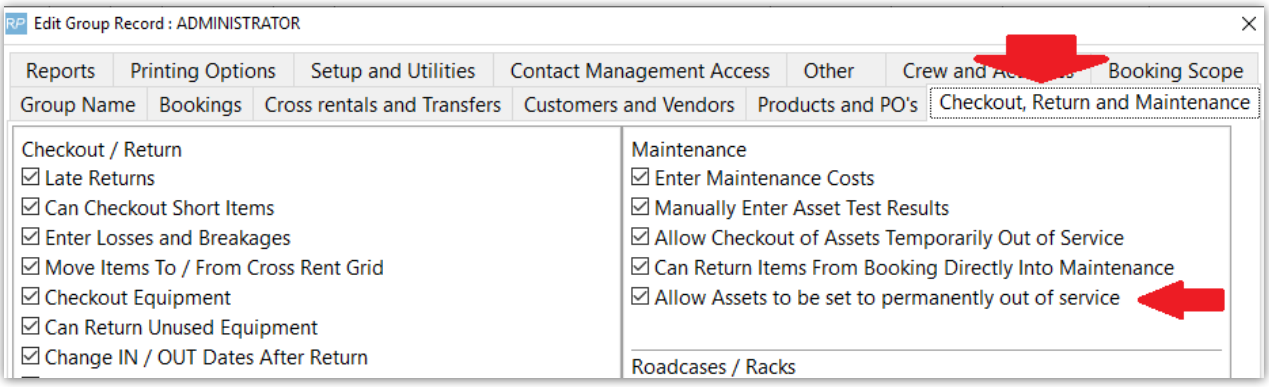
New Asset Maintenance Options

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

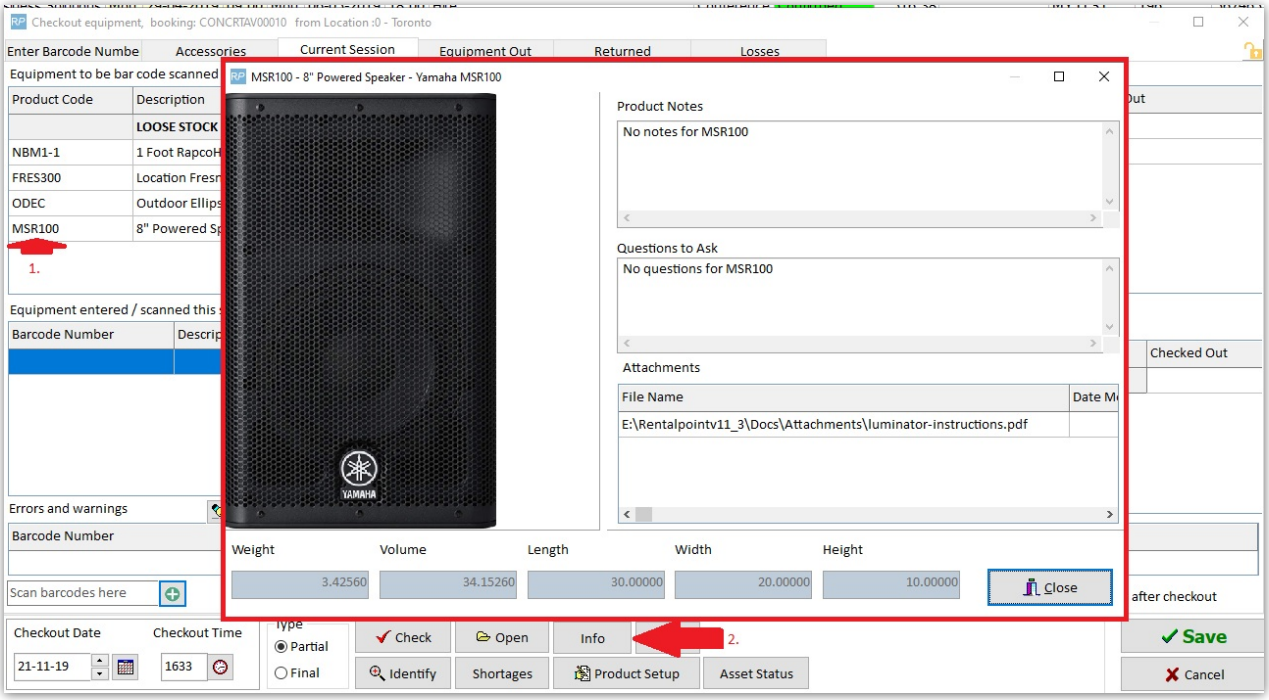
New Operator Privilege - Permanently set asset 'Out of service'

- 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'

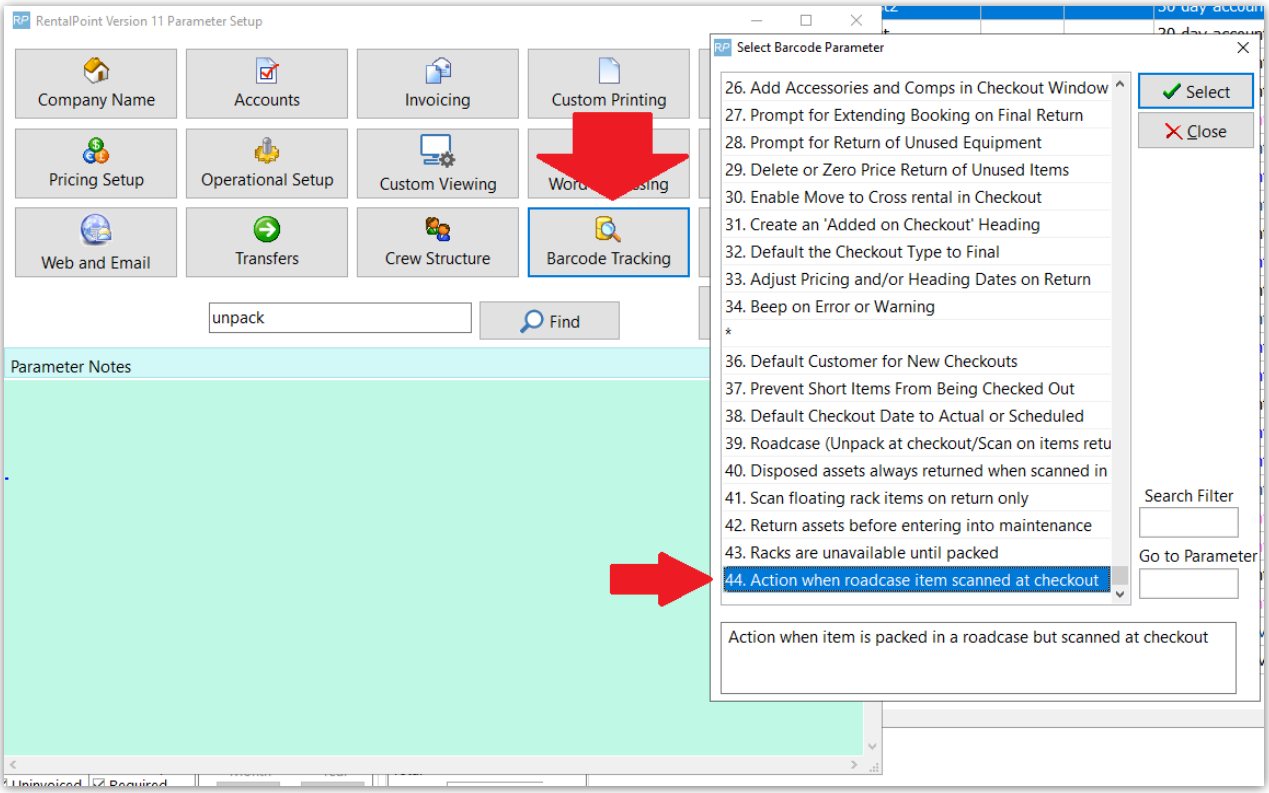
Predetermine how RentalPoint should handle items that are packed in a roadcase, but scanned out as a single item during checked session!

Exceptions:

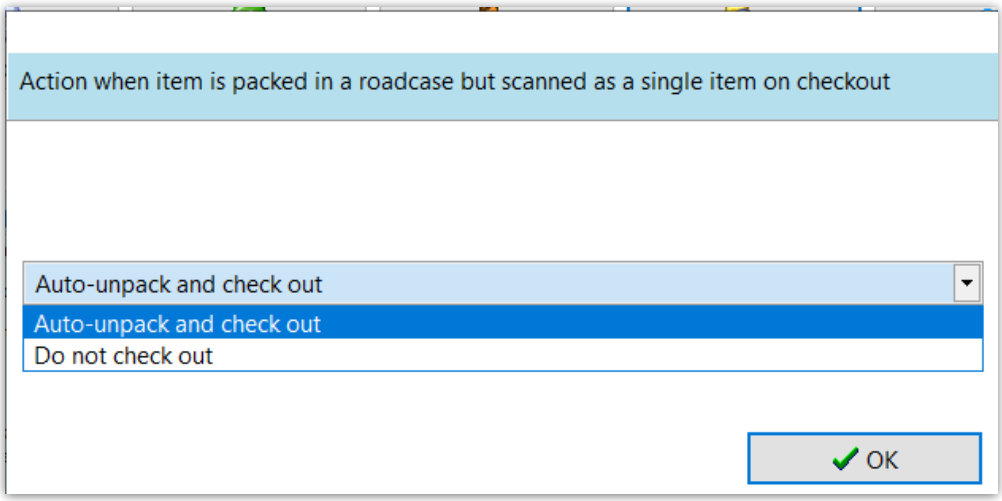
- When RFID is in use, the action is set to 'Do not check out' to ensure that scans of single items by the reader don't unpack the roadcase

- This parameter does not affect racks

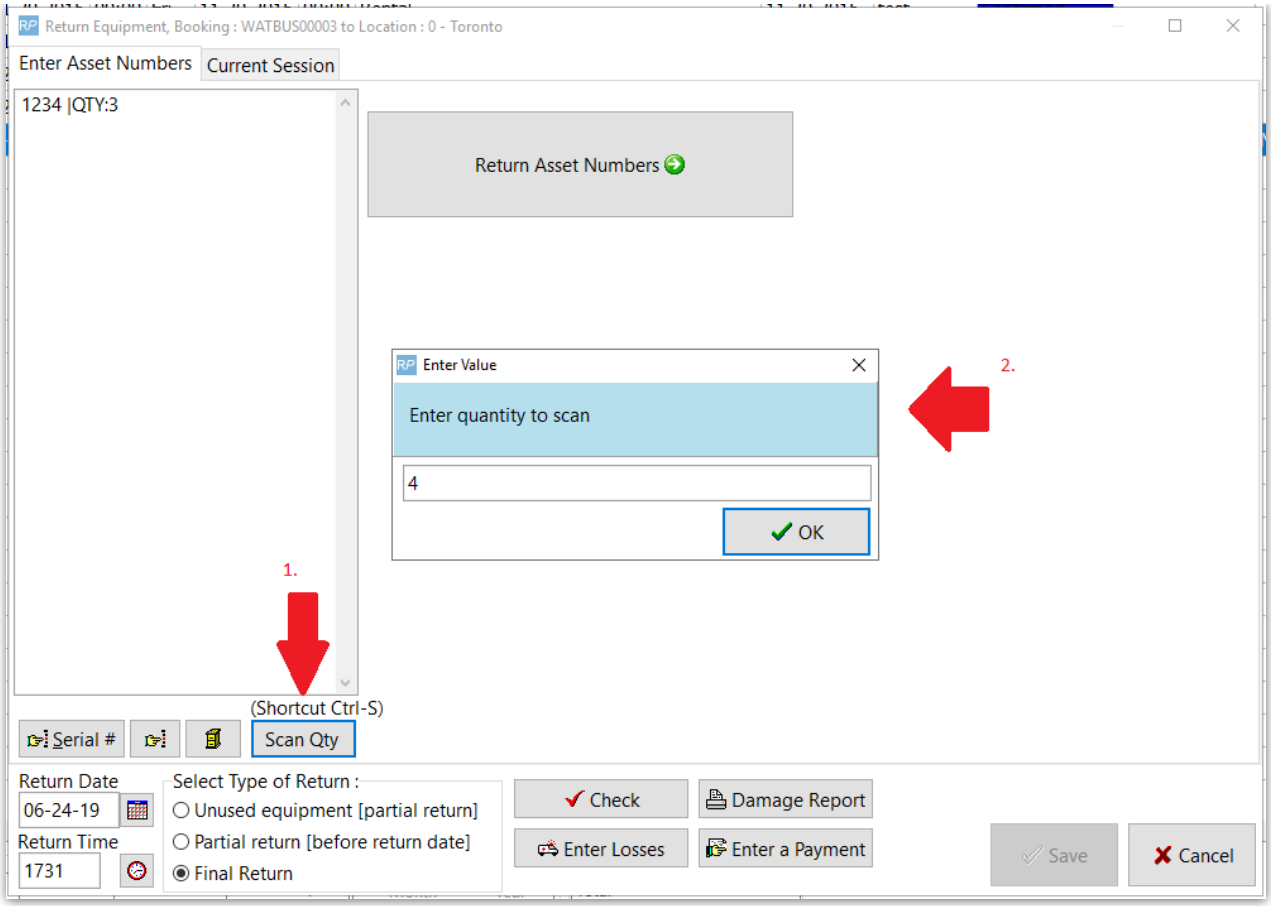
Goto Setup-->Parameters-->Barcode Tracking-->44

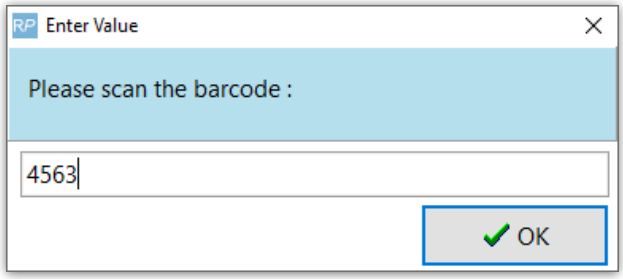


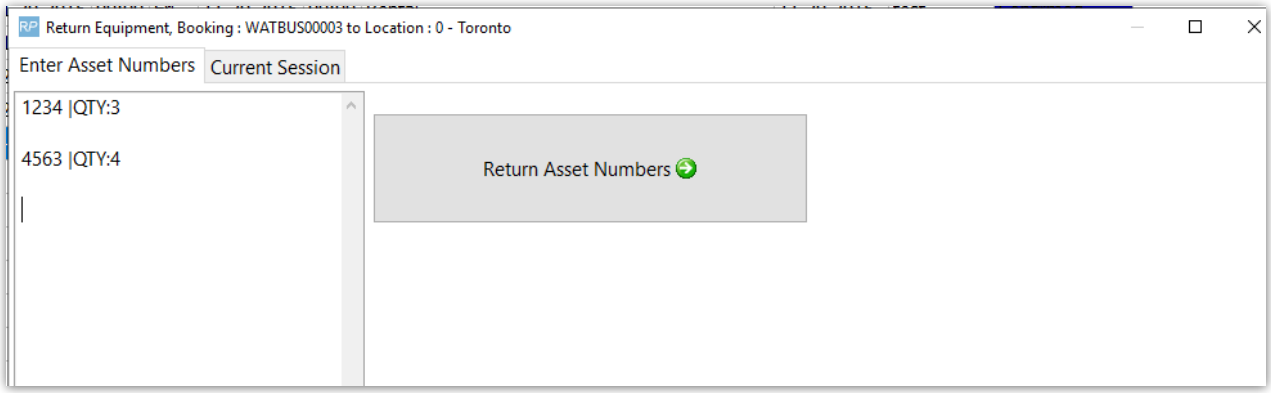
- Auto-unpack and check out: when an item that is packed in a roadcase is scanned as a single item, it is unpacked from the roadcase and checked out
- Do not check out: Shows an error message and prevents the roadcase item from being checked out



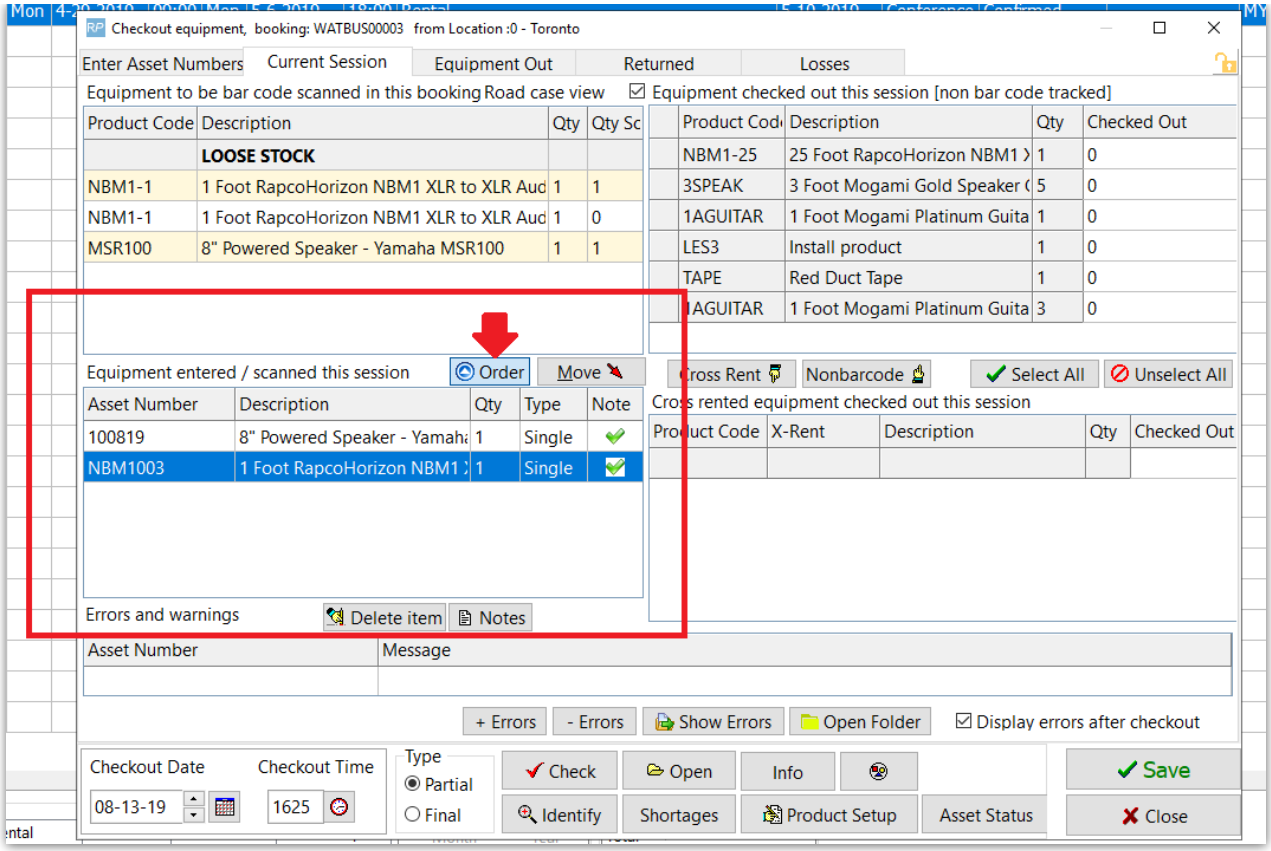
Ability to scan multiple non-barcode tracked items in return window







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

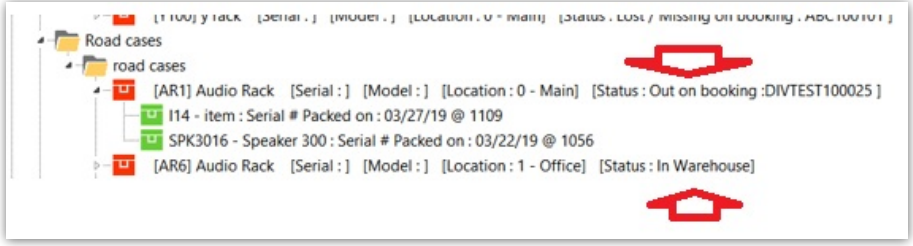
[See Section 7.1 of Help Doc]

Return of Lost/'Written Off' Equipment

<See Section 9 of document at this link>

Racks & Roadcases <full rack documentation>

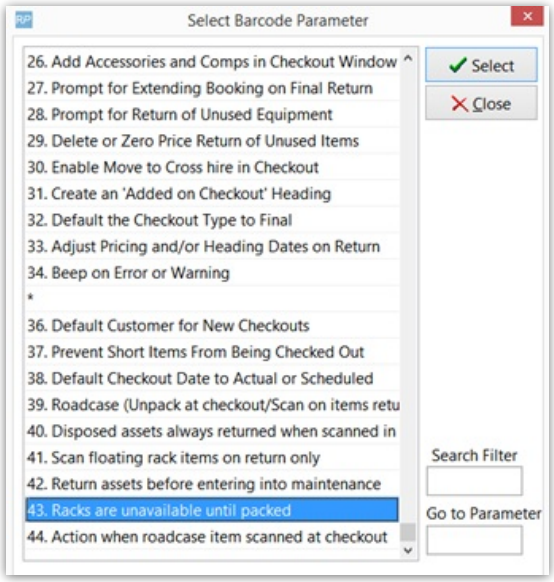
Rack/Roadcase Asset Status now shows in Inventory Setup



Racks can be made unavailable for rental until they are packed

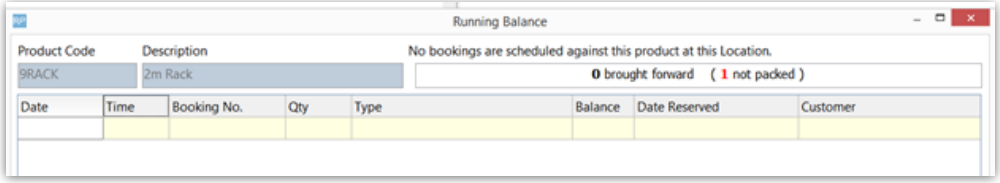
<See full rack documentation >

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

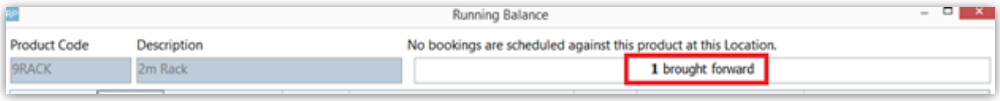


Here a new rack has been added, but is not yet packed

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.

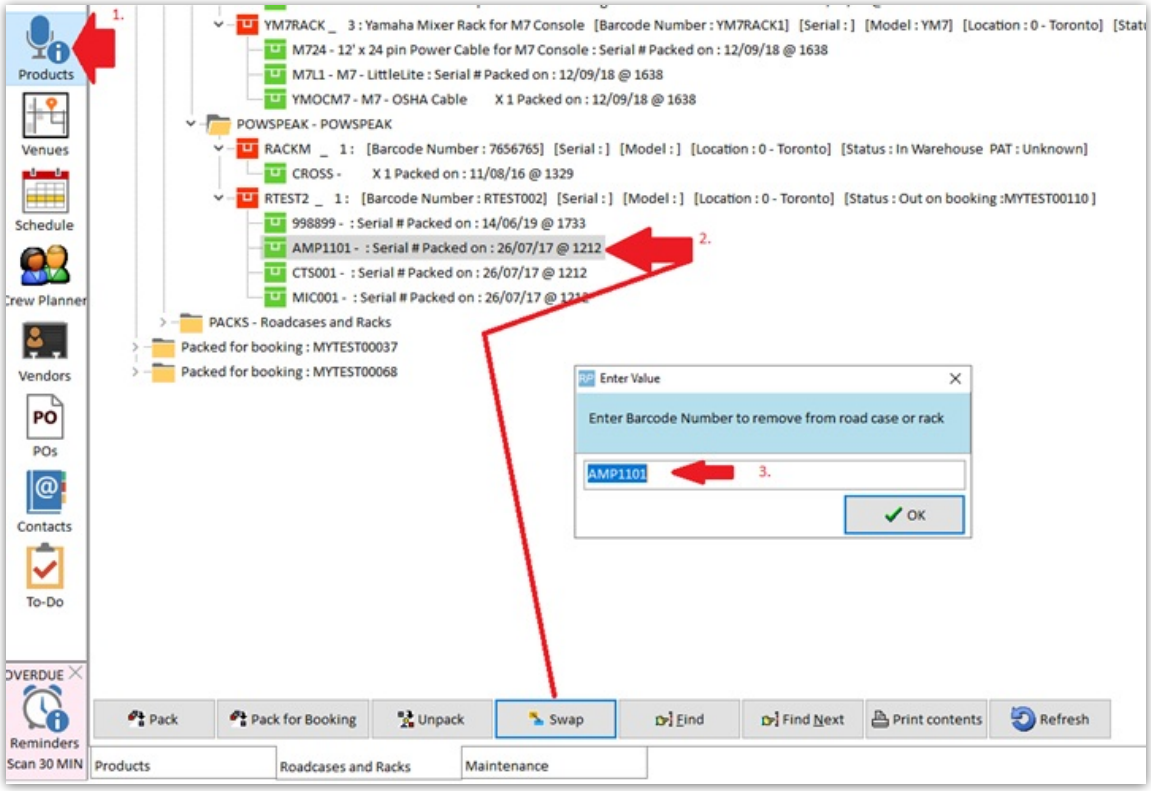
Swap damaged rack items while rack is checked out

<See full rack documentation>

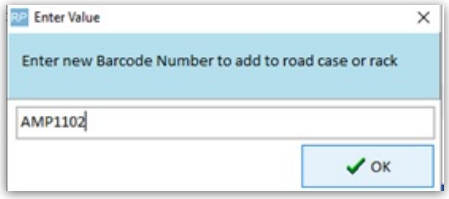
If an item in a rack or road case needs to be swapped with another due to fault or damage, use

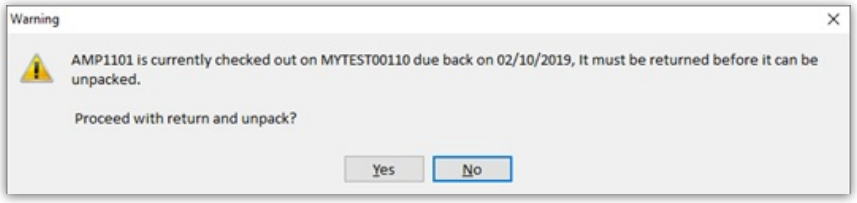
the **swap** option on the **Roadcases and Racks** tab. This option can be used even if the rack is checked out to a booking

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.

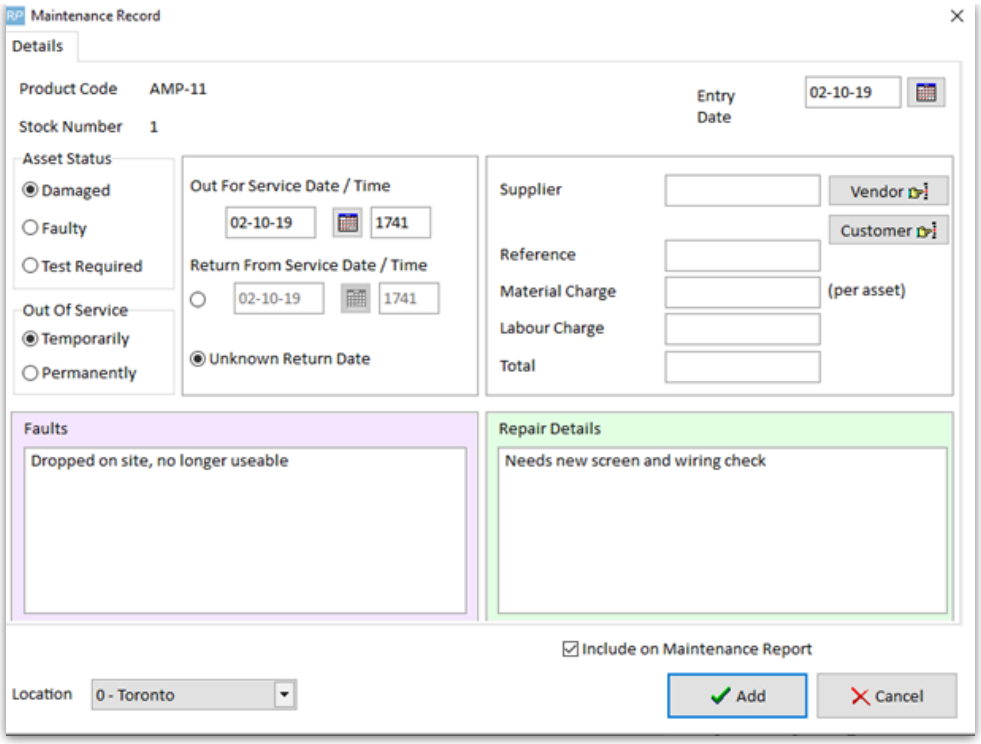




Barcoding parameter #42 'Return assets before entering into maintenance'

- 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:

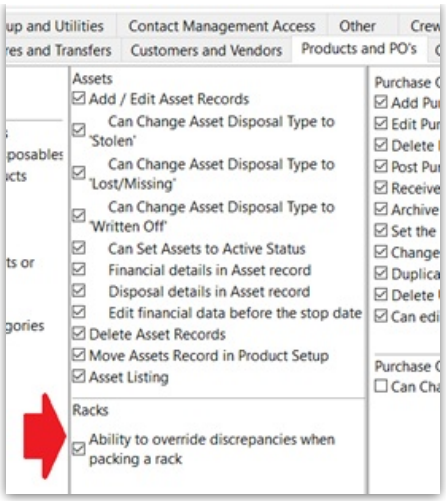
- If the original asset has a sold/disposed status it will be unpacked but not returned.
- If the new asset is sold/disposed the swap will not be allowed
- If both the original and new asset are out on the same booking the old asset will be returned (as needed) but the new asset will remain on the booking 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

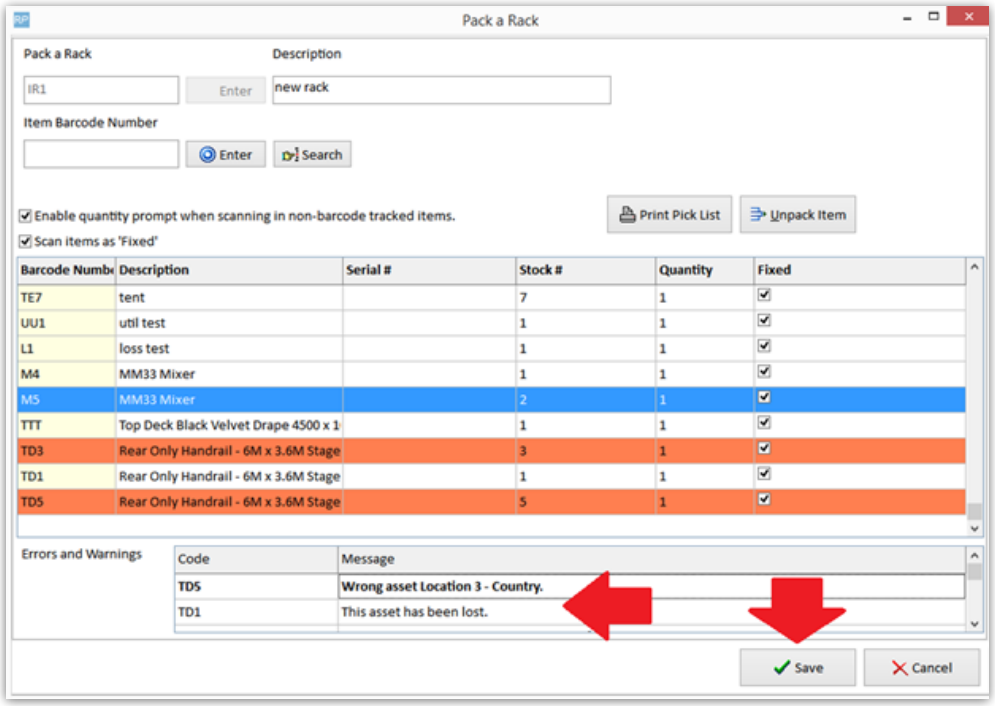
<See full rack documentation>

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.

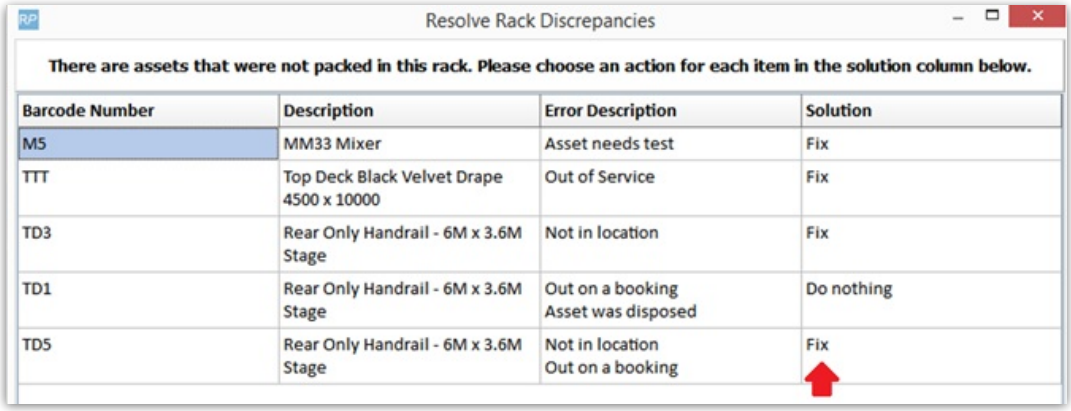
Access the operator privilege on the Products and PO's tab of the Operator Group or contact your system administrator for access.



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).



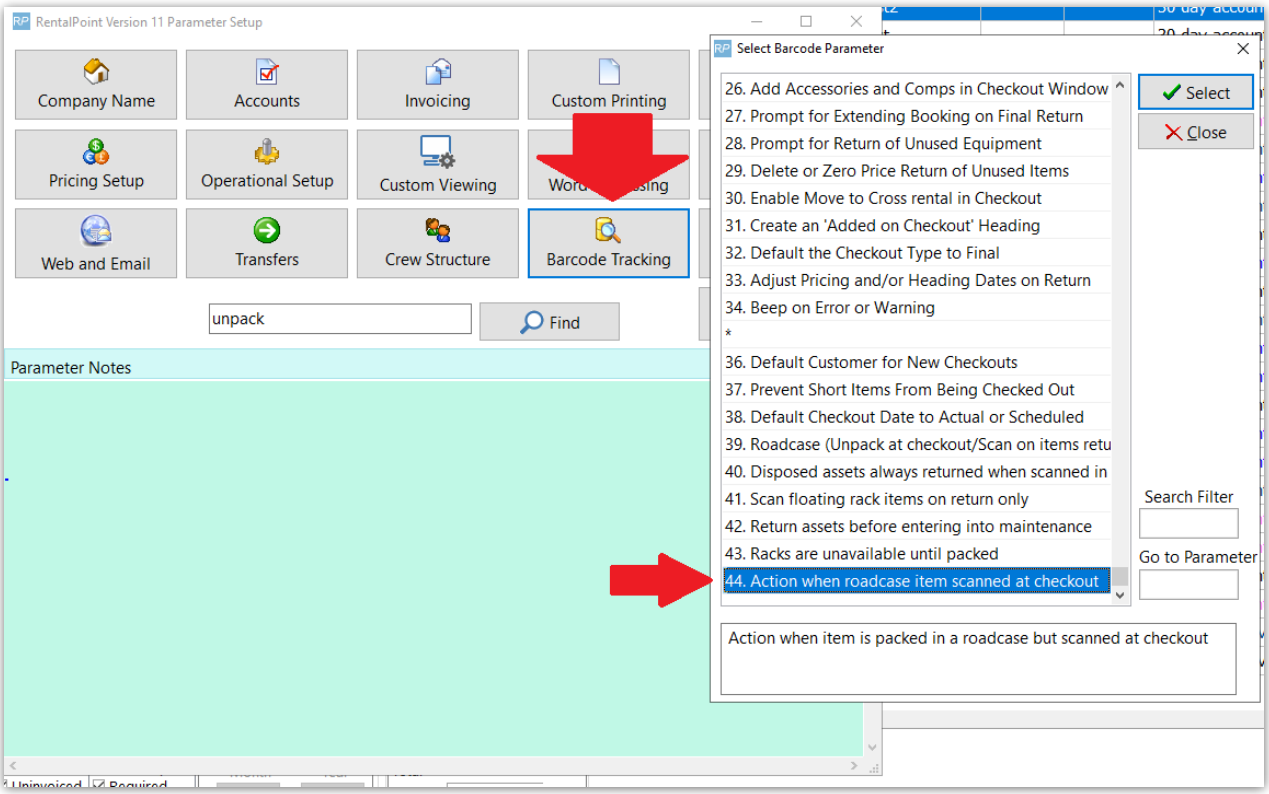
New Parameter - 'Action when roadcase item scanned at checkout'

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

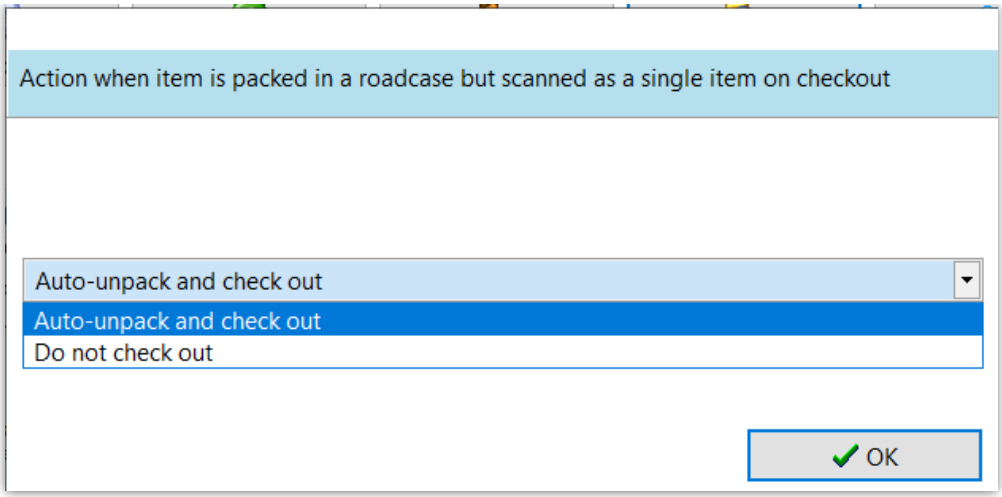
Exceptions:

- 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

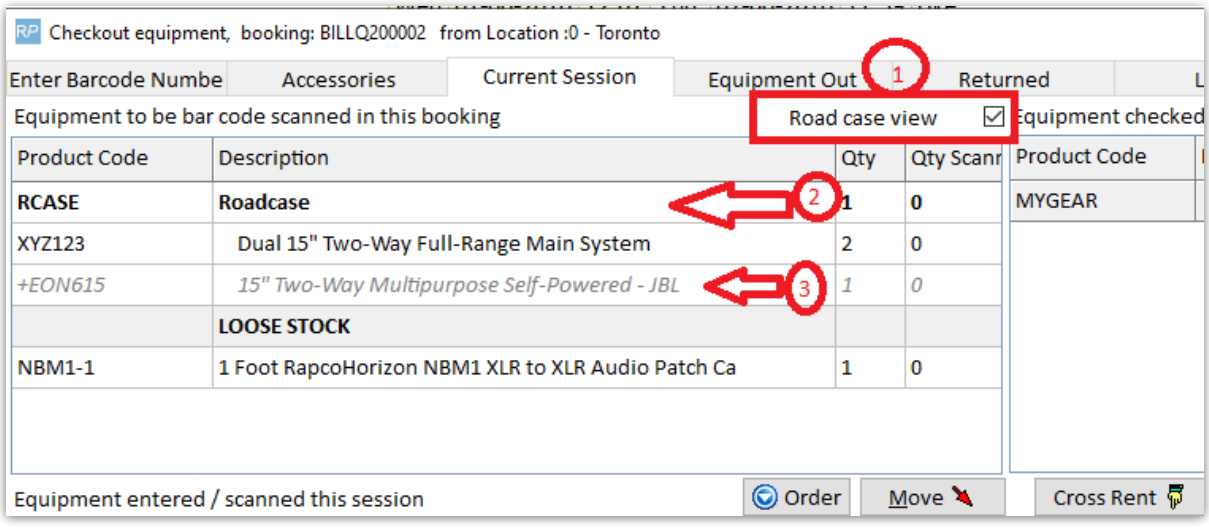


Road Case View

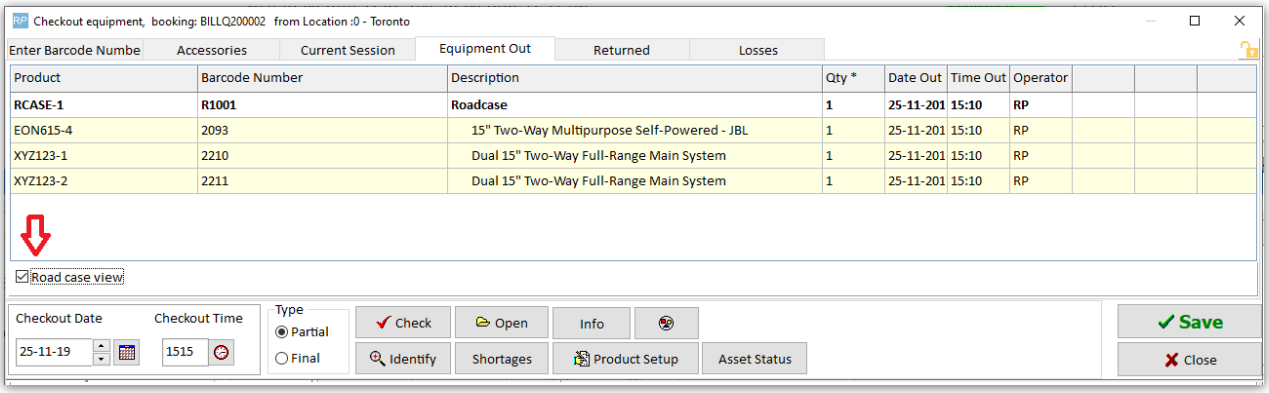
In Checkout Window

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.

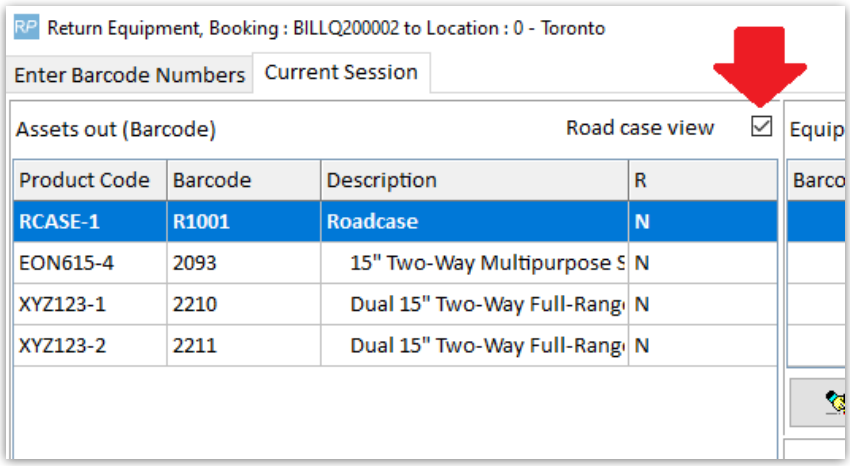
1. Enable the option by clicking the **Road case view** checkbox above the grid.
2. Once enabled the road case or rack product displays in bold and the packed items display under it.
3. If there are additional items packed that haven't yet been placed on the booking these will display in gray italics with a + sign before the product code.
    - 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.
    - 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.



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.

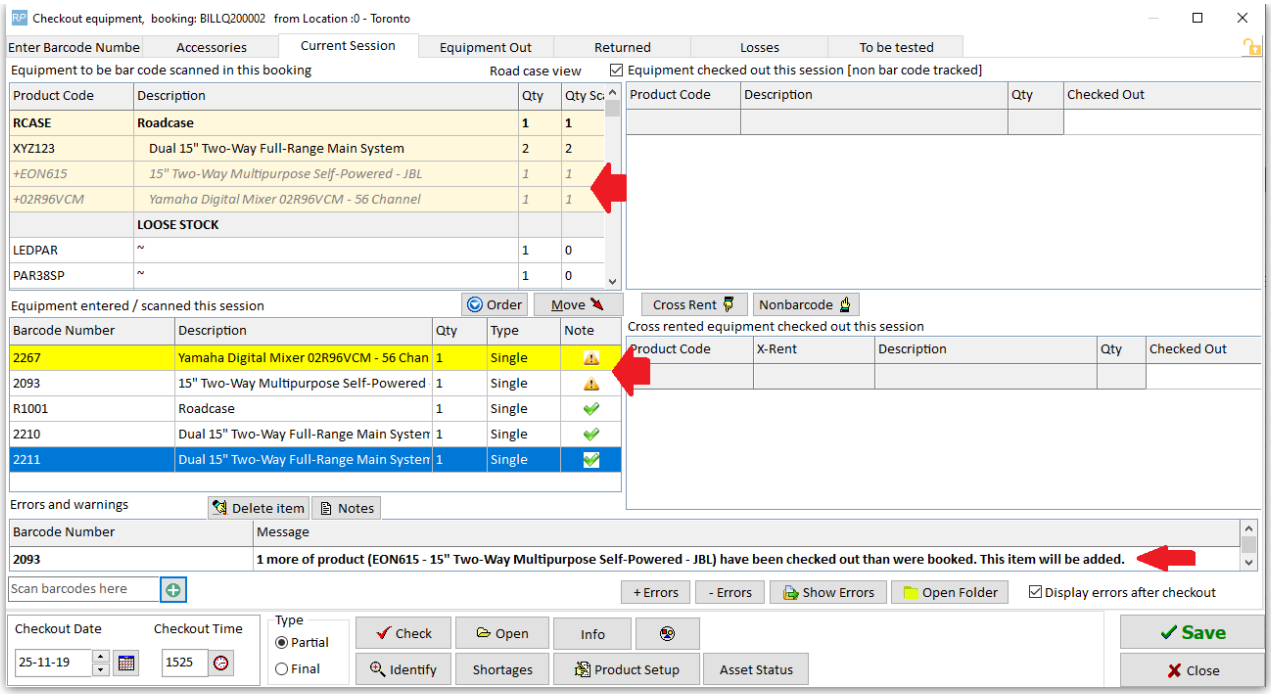


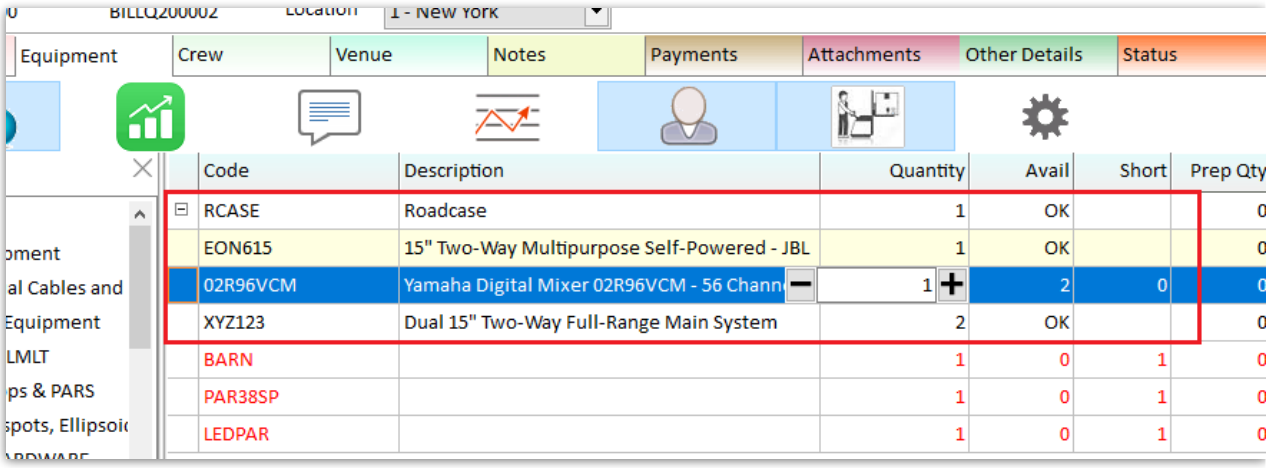
Return Window...



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


Checkout equipment, booking: BILLQ200002 from Location :0 - Toronto
Enter Barcode Numbe
Accessories
Current Session
Equipment Out
Returned
Losses
To be tested
Equipment to be bar code scanned in this booking
Road case view
Equipment checked out this session [non bar code tracked]
Product Code
Description
Qty
Qty Sc
RCASE
Roadcase
XYZ123
Dual 15" Two-Way Full-Range Main System
+EON615
15" Two-Way Multipurpose Self-Powered - JBL
+02R96VCM
Yamaha Digital Mixer 02R96VCM - 56 Channel
LOOSE STOCK
LEDPAR
PAR38SP
Checked Out
Equipment entered / scanned this session
Order
Move
Cross Rent
Nonbarcode
Barcode Number
Type
Note
2267
Yamaha Digital Mixer 02R96VCM - 56 Chan
Single
2093
15" Two-Way Multipurpose Self-Powered
R1001
Roadcase
2210
Dual 15" Two-Way Full-Range Main Systen
2211
Dual 15" Two-Way Full-Range Main Systen
Cross rented equipment checked out this session
X-Rent
Errors and warnings
Delete item
Notes
Message
2093
1 more of product (EON615 - 15" Two-Way Multipurpose Self-Powered - JBL) have been checked out than were booked. This item will be added.
Scan barcodes here
+ Errors
- Errors
Show Errors
Open Folder
Display errors after checkout
Checkout Date
Checkout Time
25-11-19
1525
Type
Partial
Final
Check
Open
Info
Identify
Shortages
Product Setup
Asset Status
Save
Close


BILLQ200002
Location
1 - New York
Equipment
Crew
Venue
Notes
Payments
Attachments
Other Details
Status
Code
Description
Quantity
Avail
Short
Prep Qty
RCASE
Roadcase
1
OK
EON615
15" Two-Way Multipurpose Self-Powered - JBL
02R96VCM
Yamaha Digital Mixer 02R96VCM - 56 Chann
2
XYZ123
Dual 15" Two-Way Full-Range Main System
BARN
PAR38SP
LEDPAR