Getting Started Guide

Last Modified on 15/04/2025 4:54 pm EDT

Our team is committed to simplifying the daily management of your event driven rentals. On that note, we've listed a few areas below that you should set up before diving into recording bookings with RentalPoint Software.

RentalPoint is a web-based application that works in your web browser, as such no software installation is needed! You can access RentalPoint from any device with both an internet connection and modern browser support. Simply click (or paste) the link provided into your web browser and log in! For best performance, ensure you are using a mainstream browser (MS Edge, Chrome, FireFox, Safari) with cookies and JavaScript enabled.

Before you start

The following resources are available to assist you in navigating RentalPoint:

- Search our knowledge base to learn how features work. No login required!
- You can also access our knowledge base from the Help link on the top menu bar of RentalPoint Software

📔 RentalPoint Bookings	×	+											
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Rental Point		E vong-manay@gmail.com •											
Dashboard			Reports - Assets - Setup - Others - Help -										
Bookings		Bookings Control panel											
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Products	۲	Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Туре	Progress Status	Show name
1 Venues		FISK00005	Fisker Automotive Corporate Office & Headquarters	Tue	26/01/2015	0800	Mon	31/12/2079	0900	LT hire Quarterly		Confirmed	

- Reach a member of the **Rental**Point Team :
 - Via the Contact Support link on https://rentalpoint3.knowledgeowl.com/help

Rental Point				rentp.com Contact Support
	Rent	alPoint3 Documenta	ution	
		to RentalPoint? Check out our Getting Started G		
	Setup & Preferences	Inventory Management	Booking Management	
	Accounts	Reports & Templates	Other Features	

- Via email: support@rentp.com
- Via phone:
 - North America (EST): +1 (613) 377-7444 (or +1 888-591-1962)
 - United Kingdom (GMT) Toll Free: 0808-134-8403 (or use the North America phone options after 2pm GMT)
 - Australia (AEST): 0407-541-290

Account Access

On completion of your enrolment, you will be provided with login credentials and a web link to access your account.

Simply click the link (or paste it into your browser) and follow the prompts to log into your account. You can customize your profile from the dropdown under your username. See Fig 1.1 below.

Access to the various software options is driven by Operator Privileges as set out by your RentalPoint System Administrator (i.e. the person in your company that decides who has access to what in RentalPoint). As a System Administrator, you can opt to tackle operator privileges and user accounts at a later stage, once the system is set up and ready for use <more information on Operator Privileges>

Fig 1.1

📔 RentalPoint Bookings	×	+											
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Rental Point												ipiy@gi	mail.com -
Dashboard		Report Profile							ofile				
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Products	<	Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Туре	Progress Status	Show name
		FISK00005	Fisker Automotive Corporate Office & Headquarters	Tue	26/01/2015	0800	Mon	31/12/2079	0900	LT hire Quarterly		Confirmed	
 Schedule Purchase Orders 		FISK00007	Fisker Automotive Corporate Office & Headquarters	Tue	26/01/2015	0800	Mon	31/12/2079	0900	LT hire Quarterly		Confirmed	

Pricing Schemes

RentalPoint uses <u>Pricing Parameters</u> to offer various rental inventory pricing options. Our Implementation Specialists are available to assist in will assist in setting up your pricing parameters tailored to how you currently price your products for rental. Please contact support@rentp.com for assistance.

Locations

Locations are useful to track inventory, revenue and bookings moving in and out of different warehouse locations. An upgraded license is required to use this feature. *Here's how it works....*

Inventory Tree

When you first subscribe to RentalPoint, our Implementation Specialist will assist with importing your inventory from Excel if desired. Our detailed *Inventory Setup Guide* will explain inventory structure, manual setup and maintenance of your inventory.

Tax Authorities

The Tax Authorities section of RentalPoint helps you maintain all the taxes used throughout the system.



Payment Terms

Payment Terms identify the payment intervals for customer accounts. Once created, payment terms can be used for any customer or booking. RentalPoint offers a default setup of 4 account types:

- Cash on delivery
- Cash on return
- 7/14 day account
- 30 day account

If these terms are not to your requirements, click the Payment Terms option in the setup menu to add your own custom terms.

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	Tax Authorities
	Regions
	Locations
	Divisions
	Freight
	Trucks
	Rooms
Ĵ	Currencies
1	Public Holidays
J	Payment Terms
1	Expense Codes
J	Cancellation Reasons
	Fast Reports
]	Activity Types
)]	Save instRec to Database
J	Settings and Preferences

	Setup Payment Terms		
Show 1	0 v entries	Search:	
#	Payment Term Name	Days Net	Action
1	Cash on delivery	0	
2	Cash on return	0	
3	7/14 day account	7	
4	30 day account	30	
5	90 Day	90	
Showing	1 to 5 of 5 entries		Previous 1 Next
€Add	New		0

E Add Net	Add new payment terms
ď	Edit existing terms (Existing payment terms you can be modified but not deleted - since they may be in use on current customer accounts/bookings
	Toggle ON for Cash Only terms - the line will turn green
Î	Toggle ON for Account terms - the line will stay black

The payment term is used against the customer account type when setting up customer details

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le	Waterloo Business So	alutions			
	2255 Dundas Street V			:	
	Mississauga		State	Ontario	
ountry	Canada		Post code	L5K 1R6	
nail & Web					
Customer Type	Customer	Vendor	,		
Currency	USD - American Dollar	\$	Tax Details		
Rental Price Set	Standard price	+	Tax Exempt		
	Standard price Retail price	¢ \$	Tax Exempt CHI No.		
Rental Price Set Sales Price Customer Pays	Standard price	¢ ¢	Tax Exempt	NYC Sales CHi Tay	÷
Rental Price Set Sales Price Customer Pays Insurance Account Manager	Standard price Retail price	¢ \$	Tax Exempt CHI No. Tax Authority #1	NYC Sales CHi Tax	¢ •
Rental Price Set Sales Price Customer Pays Insurance	Standard price Retail price	¢ ¢	Tax Exempt CHI No. Tax Authority #1		
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Payment Terms can also be set on a per booking basis if required.

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≜ ≣	Payment		
=	Payment Terms		
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血	Prompt for Payment on Invoicing		\$
ρ	Payment method	Surcharge %	2
= 🔶			2
<i>®</i> ≡	Authorised by		

Customers

When you first subscribe to RentalPoint, our Implementation Specialist will assist with importing your customers and contacts from Excel if desired. However, should you decide to set up your customers from scratch, see our detailed **Customer Setup Guide** for more information.

Venues

Rental Point	= Rental <i>Point</i> 3 ₪	0B [12.0.11.0] Rev [3510]		
Dashboard				
Bookings	Venues Control par	nel		
Markages	search text 🛛 🛪	e		
💄 Card file	Work			
📜 Products 🗸		ne	Contact	Address
🏛 Venues 🦊	+ Add		Contact	Address
🗰 Schedule	C Edit	e		200 Christopher Drive Cambridge Ontario N1R4S4
	Delete			Niagara falls
E Action Lists	Directions			
J Contacts	Heritage House			770 Main Street Milton ON L9T 3L9

Details Notes Contact Venue name CENTRE IN THE SQUARE Address	ts Floorplan					
CENTRE IN THE SQUARE						
Address						
1	01 Queen Street North					
	litchener			State	ON	
Country	CANADA		Zip Code		NNN 111	
Nebsite	ttps://centreinthesquare.com/					
Phone 1	34	212	445-3675			Ext.
Phone 2	34	889	234 4567			Ext.
ax C	Country	Area	Number			,
Cell	Country	Area	Number			

Venues are used on the venue tab of a booking



Venue / Delivery address				
New	O Venue	O Delivery Address	C	Additional Room Information
Venue Name	Heritage House		8 ti	Floor Number
Room				Max Capacity
Address	770 Main Street		وع	Ceiling Height
Line 2				
Suburb/Area	Milton	State	ON	Venue Notes
Country		Post Code	L9T 3L9	Venue Notes
Web				
	Country Code Area Cod	e Number		
Phone 1				
Phone 2				
Fax				
	Find and link Contact Search text	i ጰ 🕂 Add 🗁 Ed	it	
Venue Contact Cell			¢	Å

Operators & Privileges

Access to the various software options is driven by Operator Privileges as set out by your RentalPoint System Administrator. Contact support@rentp.com for more details.