

# Set up Rental/Sale Inventory

Last Modified on 30/03/2026 3:03 pm EDT

RentalPoint uses an **INVENTORY TREEVIEW** structure to organize and manage the inventory your company will make available for Rental/ Sale. Please take a few minutes to understand the treeview concept above before proceeding with set up.

## Group

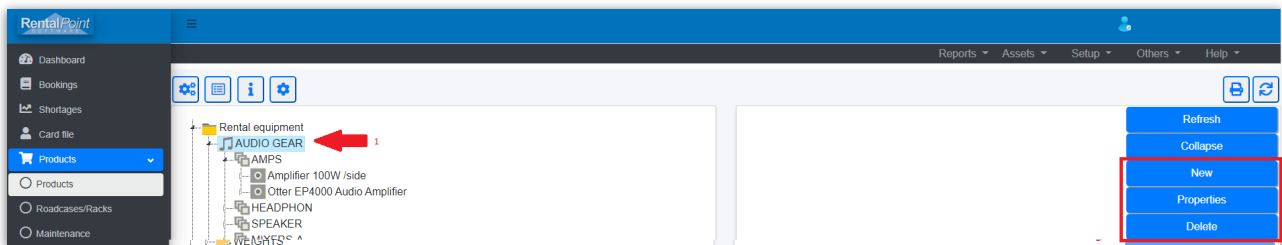
First Access Inventory Setup, then....

Create a new Rental group via **New** option when the **Rental equipment** icon is highlighted

Create a new Sales group via **New** option when the **Sales and Disposables** icon is highlighted

Open existing group properties via **Properties** option when the existing group is highlighted

Delete an empty group via **Delete** option when the empty group is highlighted



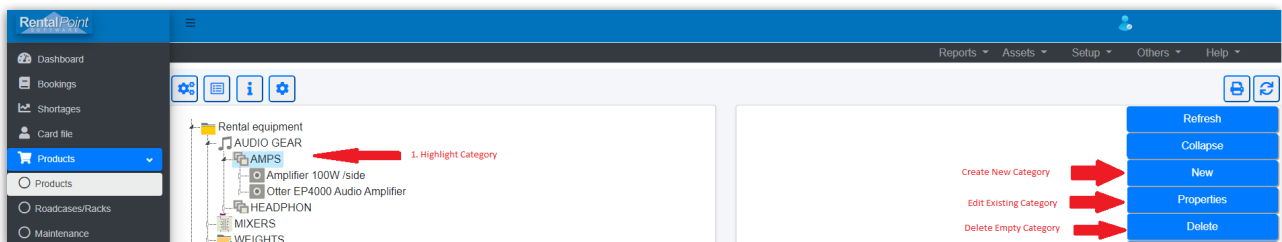
## Category

First Access Inventory Setup, then....

Create a new category via **New** option when any existing category is highlighted

Open existing category properties via **Properties** option when the existing category is highlighted

Delete an empty category via **Delete** option when the empty category is highlighted



# Product

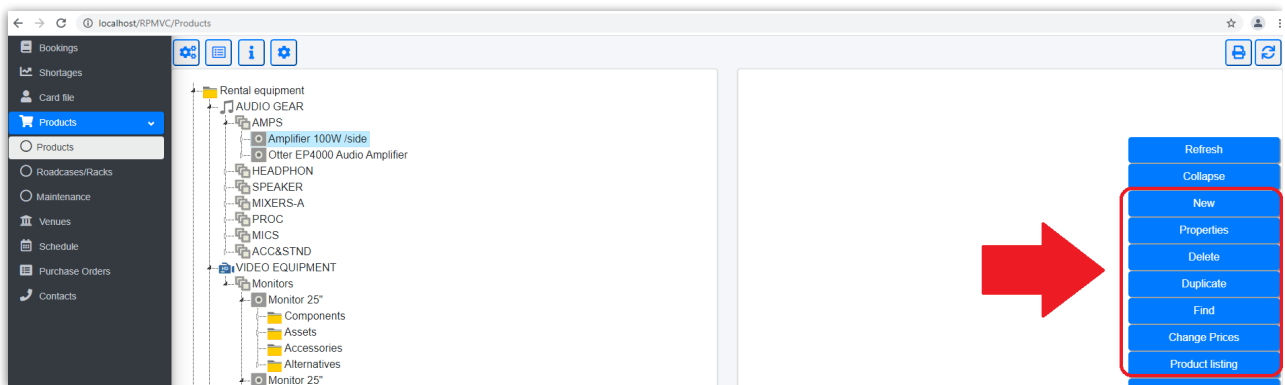
First Access Inventory Setup, then....

Create a new product via **New** option when any existing Product is highlighted

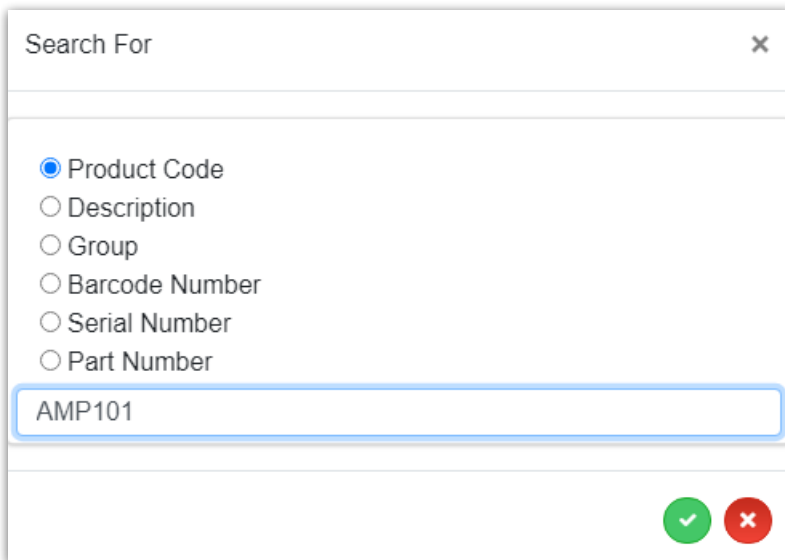
Open existing product properties via **Properties** option when the existing product is highlighted

Delete a product via **Delete** option when the existing Product is highlighted (*all assets, components, accessories and alternatives must be deleted first before the product can be deleted.*)

Duplicate an existing product via **Duplicate** option when the existing product is highlighted



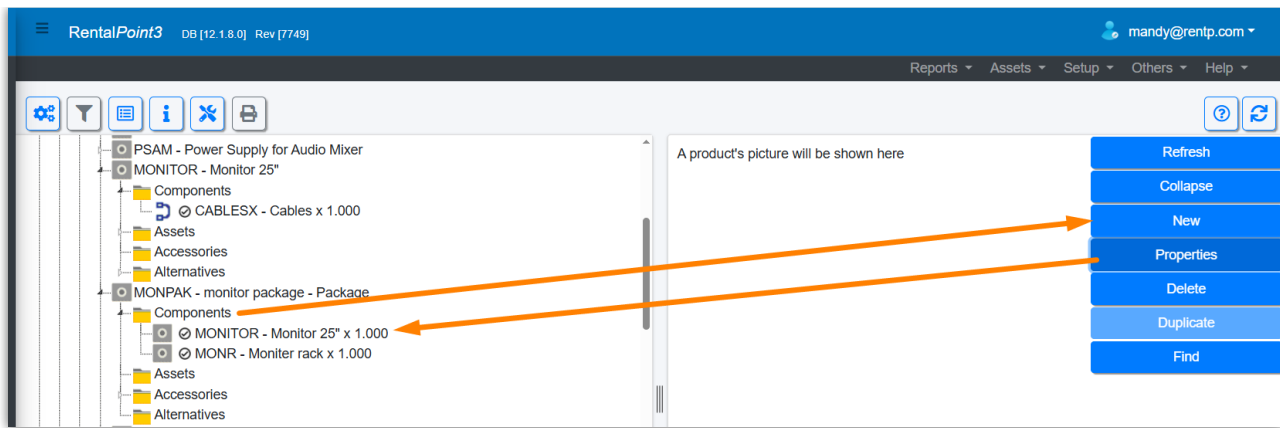
Use the **Find** option to search for an existing Group/Product/Asset per screenshot below



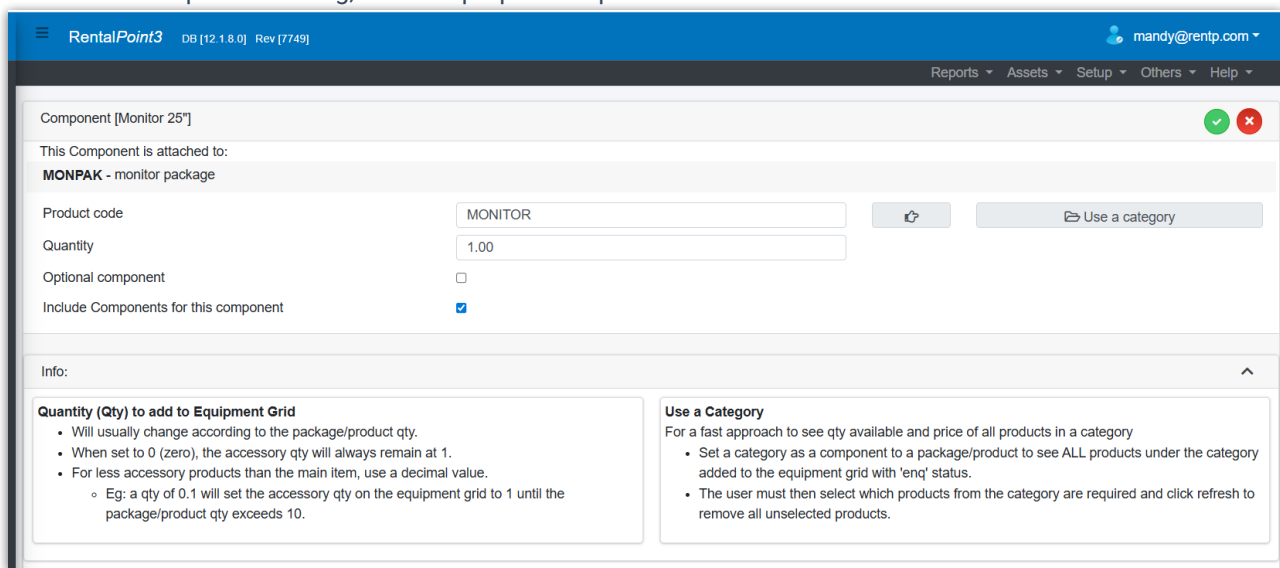
# Components

Components are parts that go out with the product in question. There is no extra cost associated with these items since they are deemed to be part of the main product being shipped.

To add a component to a product you can either cut and paste or drag and drop an EXISTING product to the Components folder of the product you are setting up.



To edit the component setting, click the properties option



## Quantity

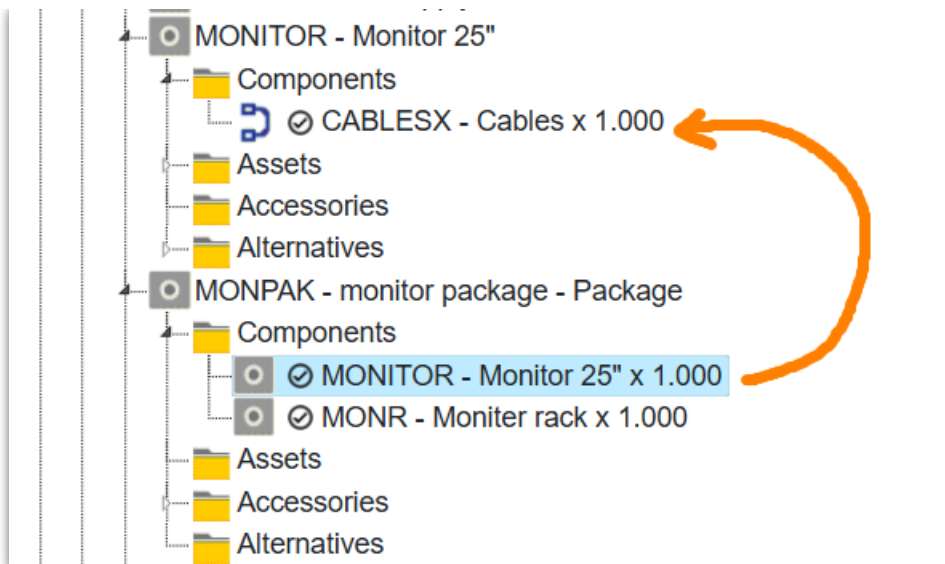
- Will usually change according to the package/main product quantity
- When set to 0 (zero), the component quantity will always remain at 1
- For less component products than the main item, use a decimal value.
  - Eg: a quantity of 0.1 will set the component quantity on the equipment grid to 1 until the package/main product quantity exceeds 10. (see further illustrations under accessories below)

## Components can be set up as optional or mandatory

- Optional components will be offered when the main product is being added to the booking.
- Mandatory components and selected optional components are added to the equipment grid the same time as the main product.

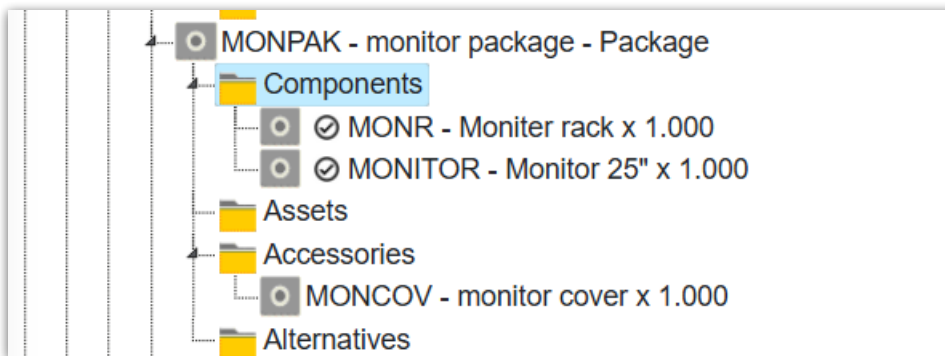
## Include components for this component

- Enable this option to add the item's components as part of the product.
- For example, the monitor has a cable component. To ensure it's included as part of the package the 'include components for this component' is checked
-



## Accessories

Accessories are products that may be shipped with your main product that are NOT included in the price of the main product; i.e. they are charged separately.



To add an accessory to a product you can cut and paste or drag and drop an EXISTING product to the Accessories folder of the product you are setting up.

RentalPoint3 DB [12.1.8.0] Rev [7749]
mandy@rentp.com

Reports Assets Setup Others Help

Accessory [monitor cover] ✓ ✗

This Accessory is attached to:  
**MONPAK - monitor package**

Product code	<input type="text" value="MONCOV"/>	<input type="button" value="↶"/>	<input type="button" value="⇒ Use a category"/>
Quantity	<input type="text" value="1.00"/>		
Include Accessories for the Accessory	<input checked="" type="checkbox"/>		
Discount	<input type="text" value="0.00"/>		

Info: ^

**Quantity (Qty) to add to Equipment Grid**

- Will usually change according to the package/product qty.
- When set to 0 (zero), the accessory qty will always remain at 1.
- For less accessory products than the main item, use a decimal value.
  - Eg: a qty of 0.1 will set the accessory qty on the equipment grid to 1 until the package/product qty exceeds 10.

**Use a Category**

For a fast approach to see qty available and price of all products in a category

- Set a category as a component to a package/product to see ALL products under the category added to the equipment grid with 'enq' status.
- The user must then select which products from the category are required and click refresh to remove all unselected products.

**Discount**

The discount specified applies to the product only when selected as an accessory to this package/product.

## Quantity

- For a 'one time only' accessory, set the accessory quantity to 0. The accessory quantity will remain as 1 even when the main product quantity is increased
- For a 1:1 ratio with the main product, set the accessory quantity to 1. The accessory quantity will equal the main quantity when added to the equipment grid
- For a 20:1 ratio for example, set the accessory quantity to .05 (where  $.05 \times 20 = 1$ ). The accessory quantity will then be set as a multiple of the main quantity.
  - Main Product Qty 1-20 --> Accessory Qty 1
  - Main Product Qty 21-40 --> Accessory Qty 2
  - Main Product Qty 41-60 --> Accessory Qty 3

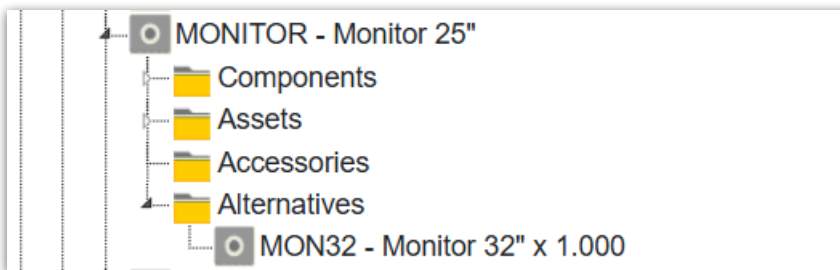
## Include accessories for the accessory

- Enable this option to add the item's components as part of the product
- When checked if the product MONCOV has components they will be included as part of the accessory

## Alternatives

Alternatives are suggested to the user when the main product is short. For example, when adding a product to a booking, the software anticipates a shortage for that item, the alternatives list will display allowing the user to select an approved alternative in its place.

To add an alternative to a product you can either cut and paste or drag and drop an EXISTING product to the Alternatives folder of the product you are setting up. Below, when the 25" monitor is short the user will have the option to use MON32 in it's place.



## Parameters affecting Alternatives

- Operational #18 'Alternative Pricing Default'
- Operational #54 'List Category as Alternative'

## Alternative Product Popup

To see alternatives to the product highlighted on your equipment grid, click on the 'Select Alternative' option from the work menu.

WH Out: 2026/02/25 08:00 In: 2026/02/26 17:00

Find Work View Change Arrange Shortages Lists Assets Heading

- Edit F4
- Delete Alt-Delete
- Copy
- Cut
- Paste
- Select Alternative
- Add Components and accessories

**Add**

- + Add Product Alt-A
- + Add and Sell rental product
- H Add Heading Alt-H
- + Add Sundry Alt-S
- + Add Comments Alt-C Alt-S

**Add and Sort**

- + Add below selected line ✓
- ↑ Insert above selected line

### Select Alternative - Select an Alternative for the: MONITOR

Alternative Product	Description	Qty	Avail	Short	Unit Rate	Price	Select Qty
MON32	Monitor 32"	1	4	0	123.89	123.89	<input type="text" value="1"/>

Region

Location

Use alternative product rate
  Keep product rate
  Include items from Sub Categories

Show products at All Locations

# Asset

First Access Inventory Setup, then

Create a new asset for Rental products via **New** option when any existing Asset is highlighted (or highlight the asset folder)

Open existing asset properties via **Properties** option when the existing Asset is highlighted

Delete existing assets via **Delete** option when the existing Asset is highlighted

