


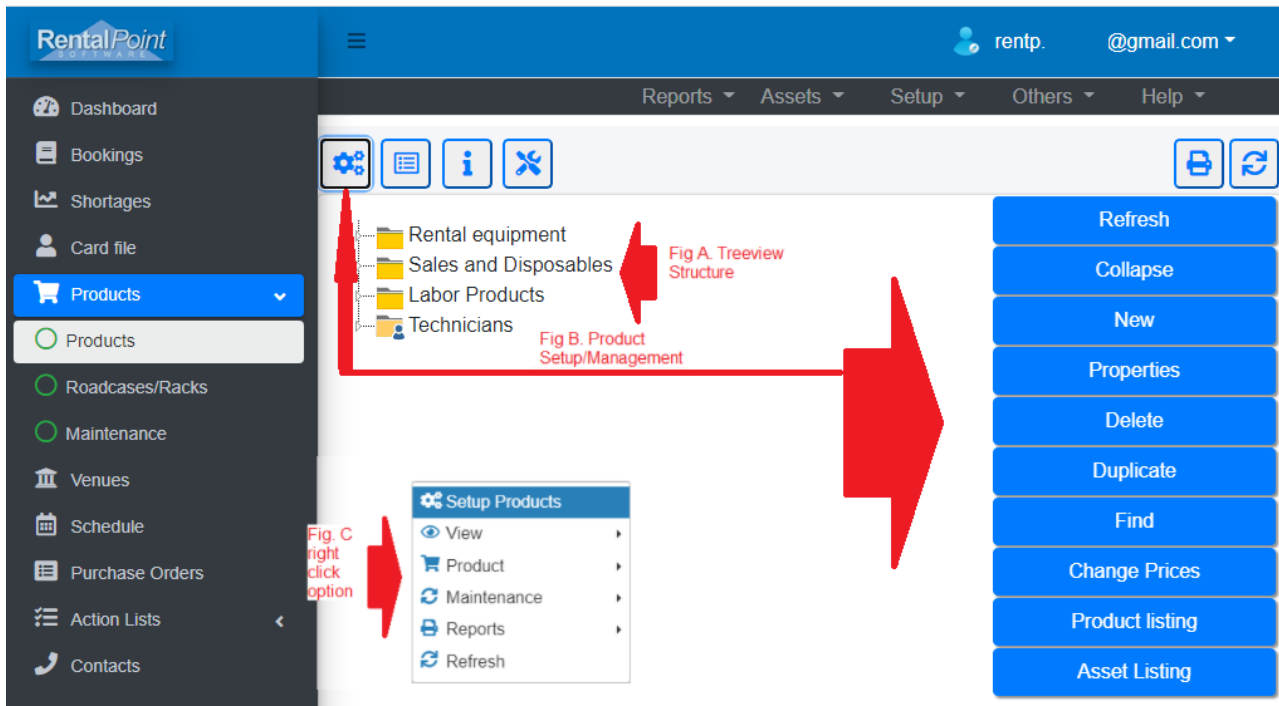
Inventory Treeview

Last Modified on 14/04/2022 1:50 pm EDT

RentalPoint uses a Treeview Structure (Fig A below) to organize and manage the inventory your company will make available for Rental or Sale. Inventory **must be entered here** before it can be added to the equipment grid of a booking.

Please take a few minutes to understand the treeview concept above before proceeding with either manual set up from menu items OR import from csv file (both options outlined below).

Access the Product Setup/Management options via the gear icon  on the products menu (Fig B below) or via right click option on the Products page (Fig C below)



Treeview Structure

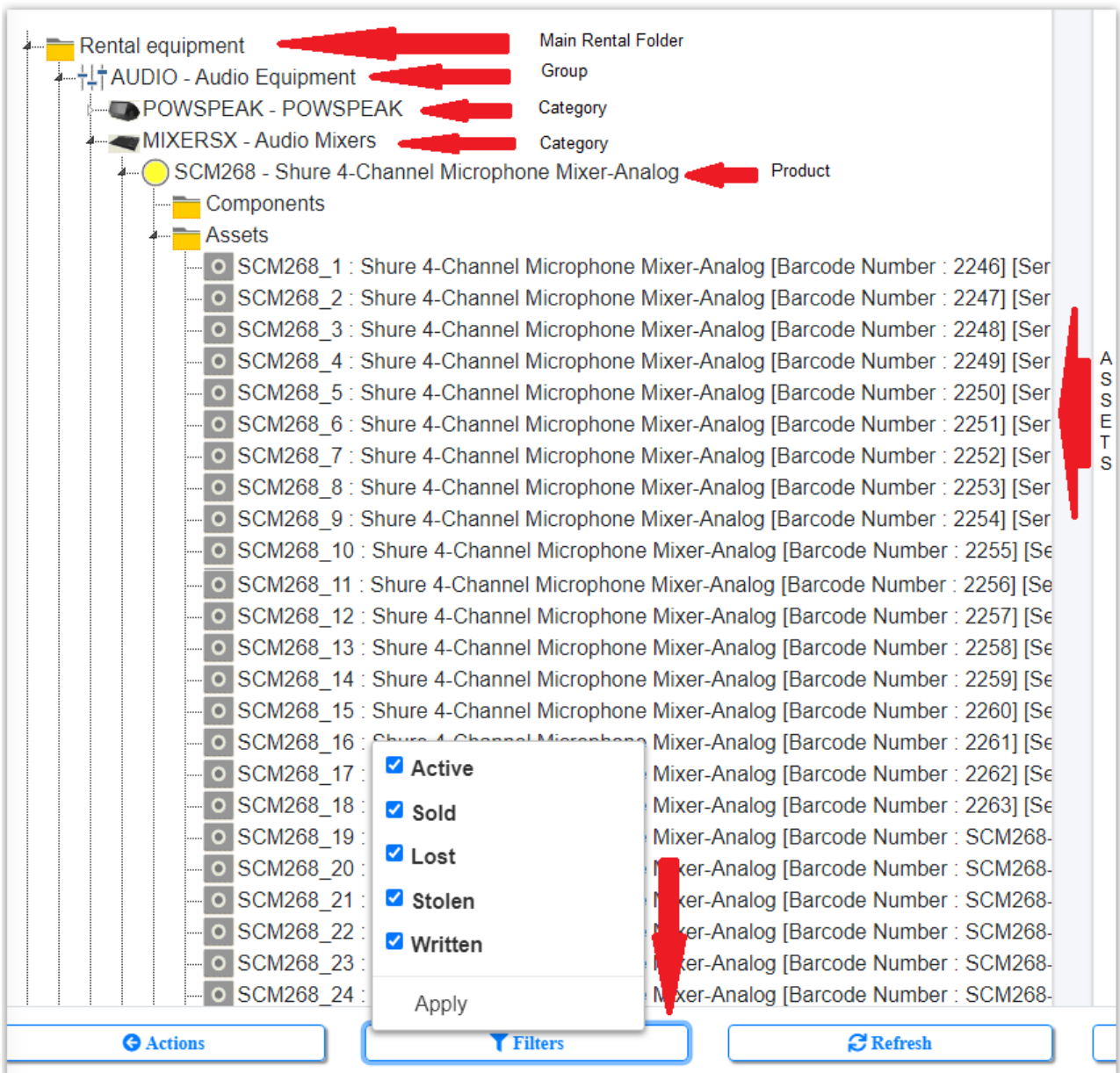
RentalPoint uses a treeview structure to organize products. There are four main folders (listed below), these folders cannot be renamed or moved, these are the root structures of the tree. You may customize icons for group, category, product within the setup of each record.

1. Rental Equipment,
2. Sales and Disposables,
3. Labour Products,
4. Technicians

Within these root structures you can create Groups, Categories, Subcategories, Products and Assets.



Ensure boxes are checked for all assets you want visible in the Inventory Tree via Filters option at the bottom of the screen



Group

Groups are used to separate large areas of equipment. An example of a group may be Audio, Lighting or Staging.

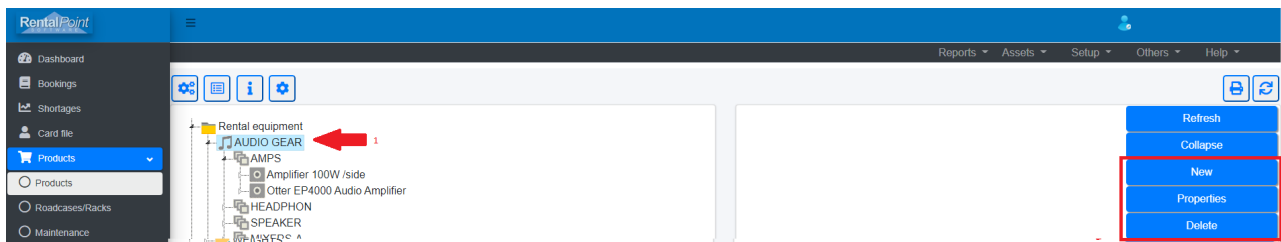


Create a new Rental group via **New** option when the **Rental equipment** icon is highlighted

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

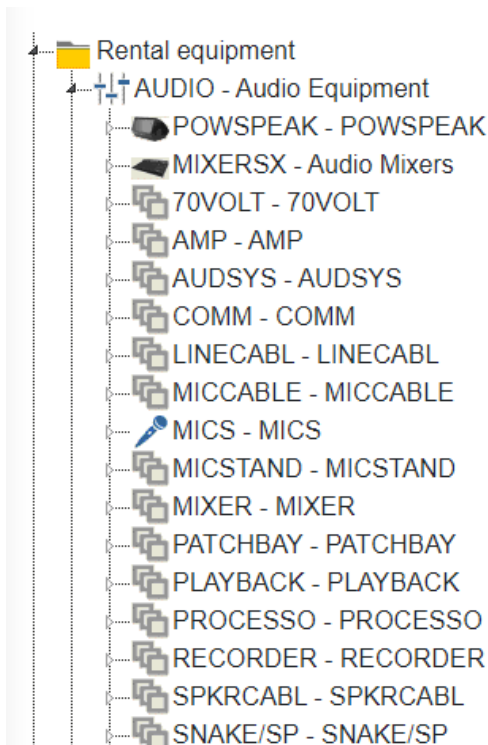
Open existing group properties via **Properties** option when the existing group is highlighted

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



Category

A category helps to further split up the main group folder. So within the Audio group, you may want to use categories such as Power Speakers, Microphones or Sound Boards.

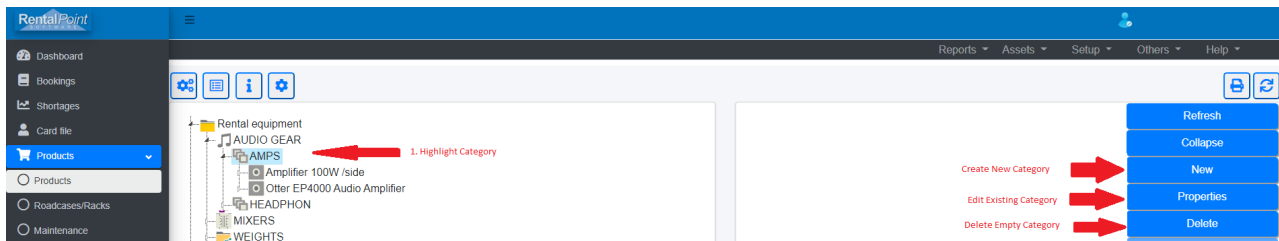


Categories

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



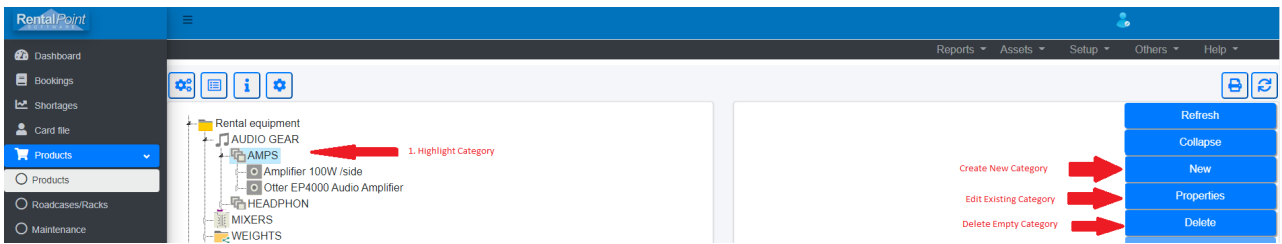
Subcategory

Subcategories can be enabled via Operational Parameter #194. This allows further organization of your categories. So within the Microphone category you may want subcategories of Wired Mics, Wireless Mics or Lapel Mics.

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

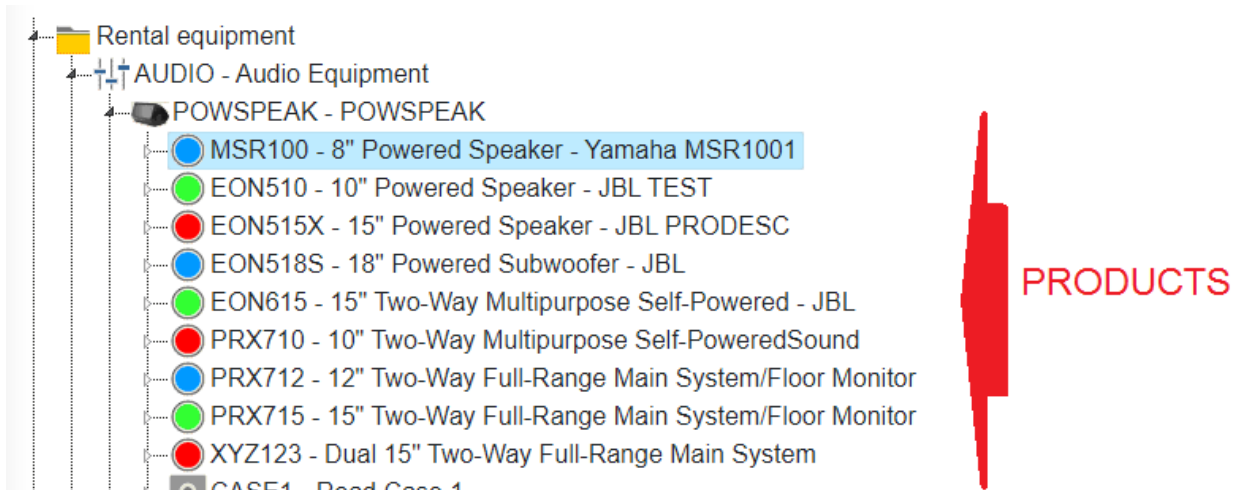
Open existing category properties via **Properties** option when the existing category is highlighted

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



Product

A product is the information related rental/sales items used on bookings.

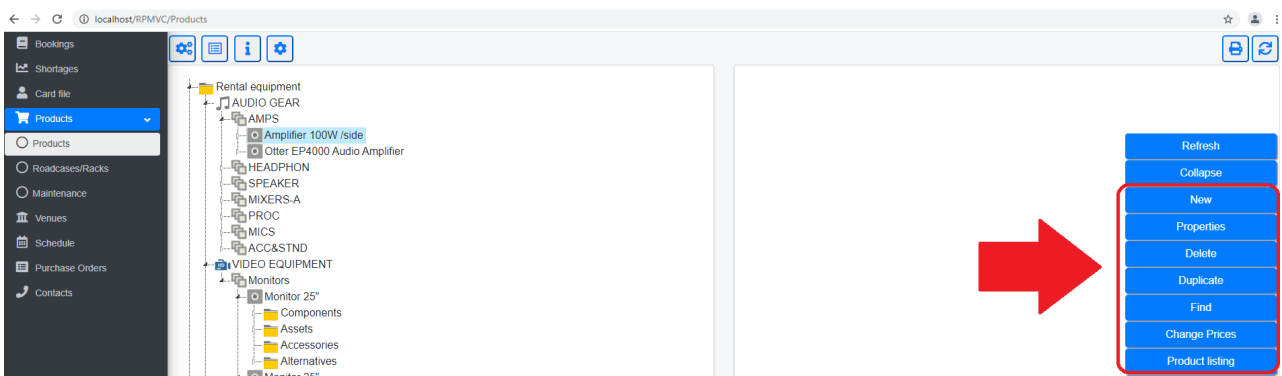


Create a new product via **New** option when any existing Product is highlighted

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

Search For



- Product Code
- Description
- Group
- Barcode Number
- Serial Number
- Part Number

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Asset

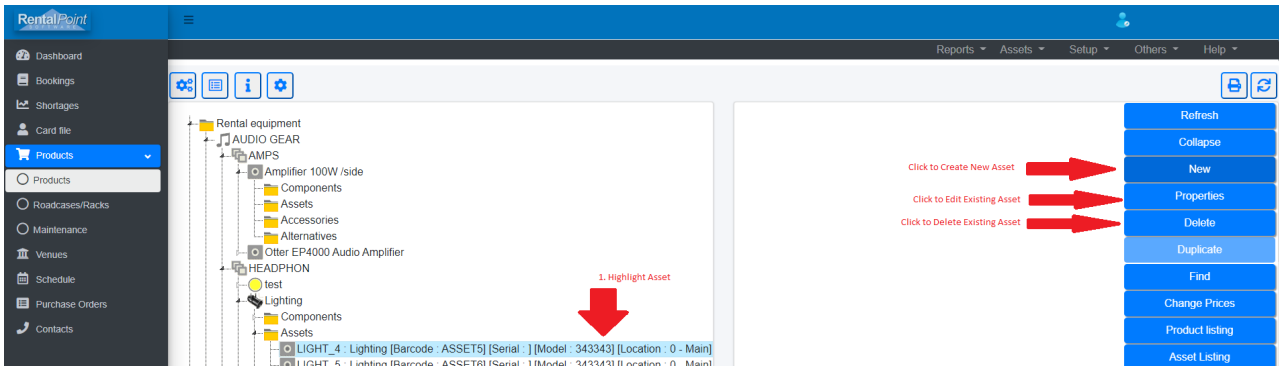
Assets are the individual items that are sent to a client. You may have five microphones in your warehouse and each has a barcode. You would enter these microphones individually into the Asset folder.

Uniquely Barcoded Assets

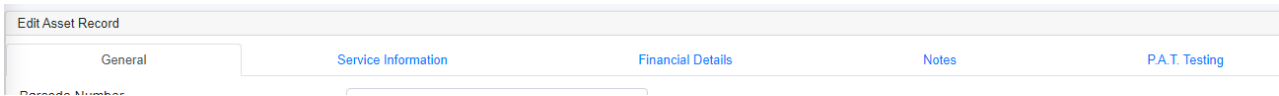
Create a new asset for Rental products via **New** option when any existing Asset is highlighted (or highlight the asset folder)

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



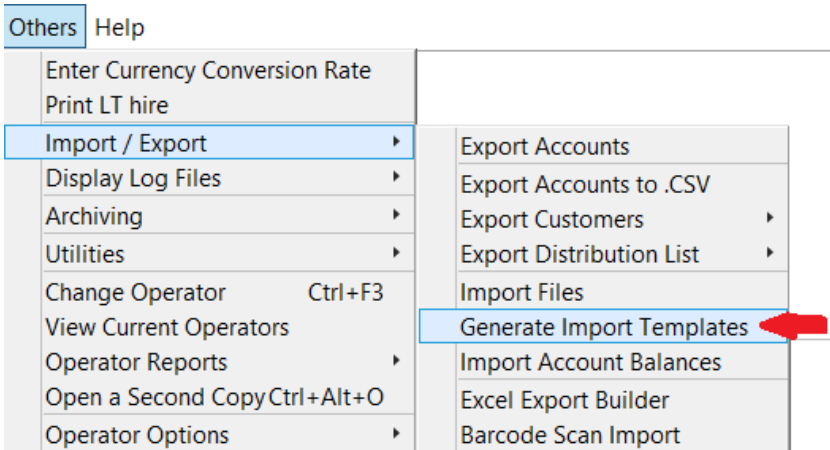
Link to a tabbed article here



Import from csv

Using the 'Rental Inventory.csv' template available with the Product Import option in RentalPoint2, you can import Products and their assets using the 'Clear All' 'Match All' functionality in the system.

Access your import templates from the RentalPoint2 main menu



NOTE:

- Any Groups, Categories, Sub Categories that do not already exist in inventory will be created. Any existing Groups, Categories, Sub Categories will be updated.
- All of the fields with an '*' beside them are Asset Fields so the information contained in those fields is stored against the asset record if created.
- When importing a comma delimited file 'csv', do not use commas within any cell of your template in order to ensure the data is imported correctly

Please reach out to support@rentp.com should you require assistance with your import.

Here's what needs to be done.

To complete the spreadsheet:

- See [TreeView Structure](#) information for how RentalPoint organizes Inventory.
- Complete fields in the spreadsheet, some are required like fields in the screenshot below - the fields do not need to be in any particular order in the import file, I've moved some around for ease of entry. Just keep the names 'as is' for ease of import.
 - Line 1 ensures the headings match those expected so that you can use 'clear all' 'match all' when importing
 - Lines 2,3 import two assets for the product GHH15
 - Cell H identifies the product as asset tracked
 - Cell BB uniquely identifies the asset
 - All field headings with an '*' like cells BB and BD are only used for asset records
 - Lines 4,5,6 import three assets for product SAM60
 - Line 7 imports one NON tracked product with a record of 10 items in stock.
 - Cell H is 'N'
 - Cell G is optional but allows you to scan cables using a product barcode
 - Cell I denotes qty owned

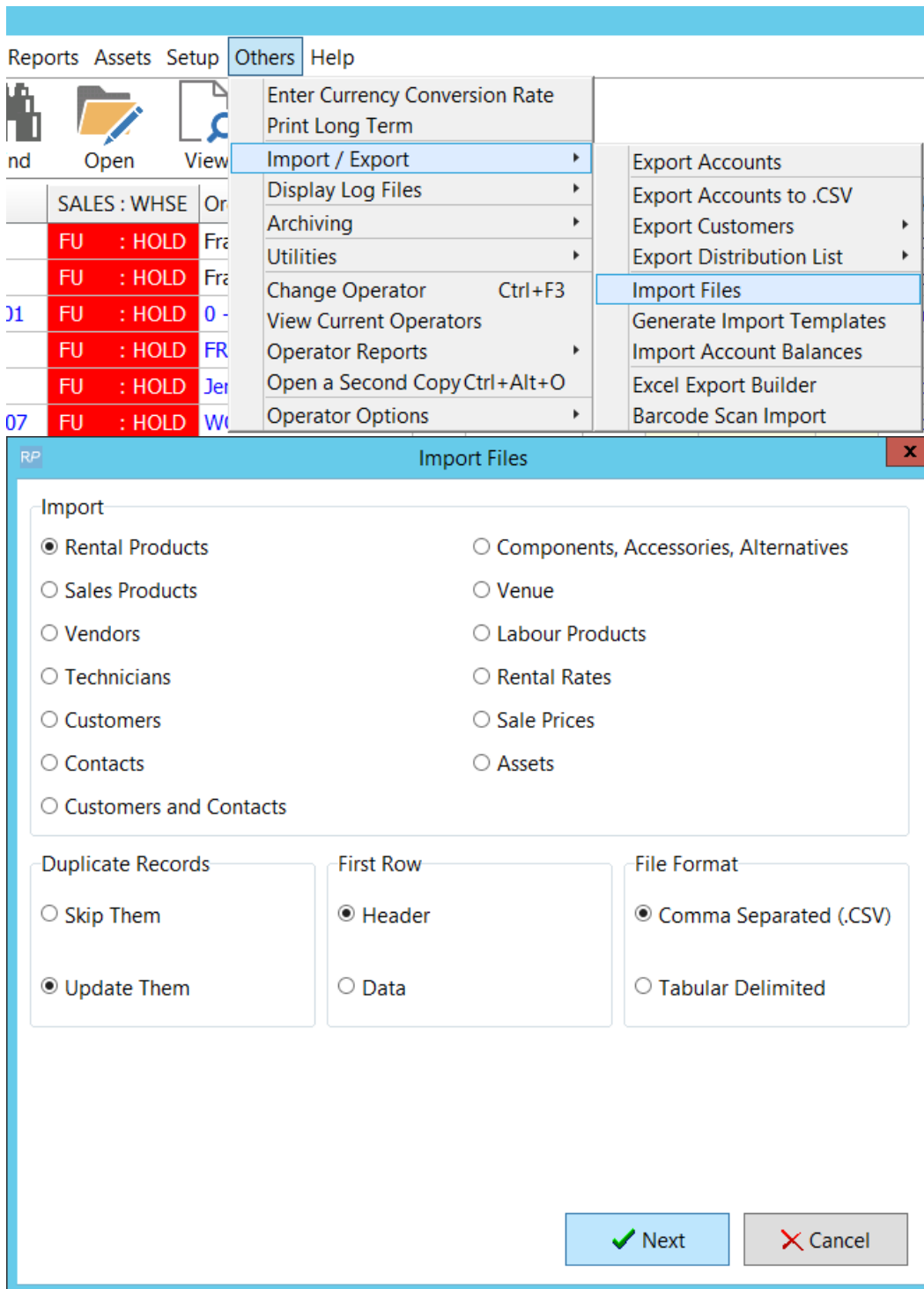
See attached sample file for your reference.

Product Group	Group Description	Product Category	Category Description	Product Code	Product Description	Non Tracked Bar Code	Asset Track	Quantity Owne	Asset Description * Model Nu
G1	AUDIO	C1	Powered Speakers	GHH15	GHH 15 Floor Standing Speaker		Y		500001 GHH 15 Floor Standing Speaker
G1	AUDIO	C1	Powered Speakers	GHH15	GHH 15 Floor Standing Speaker		Y		500006 GHH 15 Floor Standing Speaker
G2	VIDEO	C2	Displays/Monitors	SAM60	60" Samsung LED Touchscreen		Y		500007 60" Samsung LED Touchscreen
G2	VIDEO	C2	Displays/Monitors	SAM60	60" Samsung LED Touchscreen		Y		500008 60" Samsung LED Touchscreen
G2	VIDEO	C2	Displays/Monitors	SAM60	60" Samsung LED Touchscreen		Y		500009 60" Samsung LED Touchscreen
G1	AUDIO	C3	Speaker Cables	NX1510C	NX15 10' Cable	NX1510	N	10	NX15 10' Cable

Importing the Spreadsheet:

Ensure Operational Parameter 65 'Use Assets to Calculate Qty' is set to YES. If you have to set it, then log out of RentalPoint and back in again before proceeding. You should only have to do this once.

1. Backup the Database using SQLBackupandFTP as previously discussed
2. Ensure no users are in Inventory Setup so that they are not interfering with any products you are trying to update
3. Import files in RentalPoint



Load the csv file, then click 'Clear All' 'Match All' 'Leave Maintenance Record As Is' and Import

RP Import Rental Data

Drag fields from 'Import Fields' and drop in 'Matching Fields':

Import Fields	RentalPoint Fields	Matching Fields
Product Group	Product Group	Product Group
Group Description	Product Category	Product Category
Product Category		
Category Description		
Product Code	Product Code	Product Code
Product Description	Product Description	Product Description
Printed Description	Part Number	Part Number
Allow Discount	Quantity Owned	
Office Location	Country of Origin	Country of Origin
Unit Volume	Non Tracked Bar Code	
Unit Weight	Default Accessory Discount	
Unit Length	Revenue Code	Revenue Code
Unit Width		
Unit Height		
Cost price		
Country of Origin		
Revenue Code		

Inventory Import Options

You can use the import tool to update asset information. If you're updating the asset serial number there may be maintenance records attached to the serial number. You can choose to update the maintenance records to reflect the new serial number, or leave the maintenance records as is.

Update Maintenance Records
 Leave Maintenance Records As Is

* - Denotes fields that are only related to the asset record

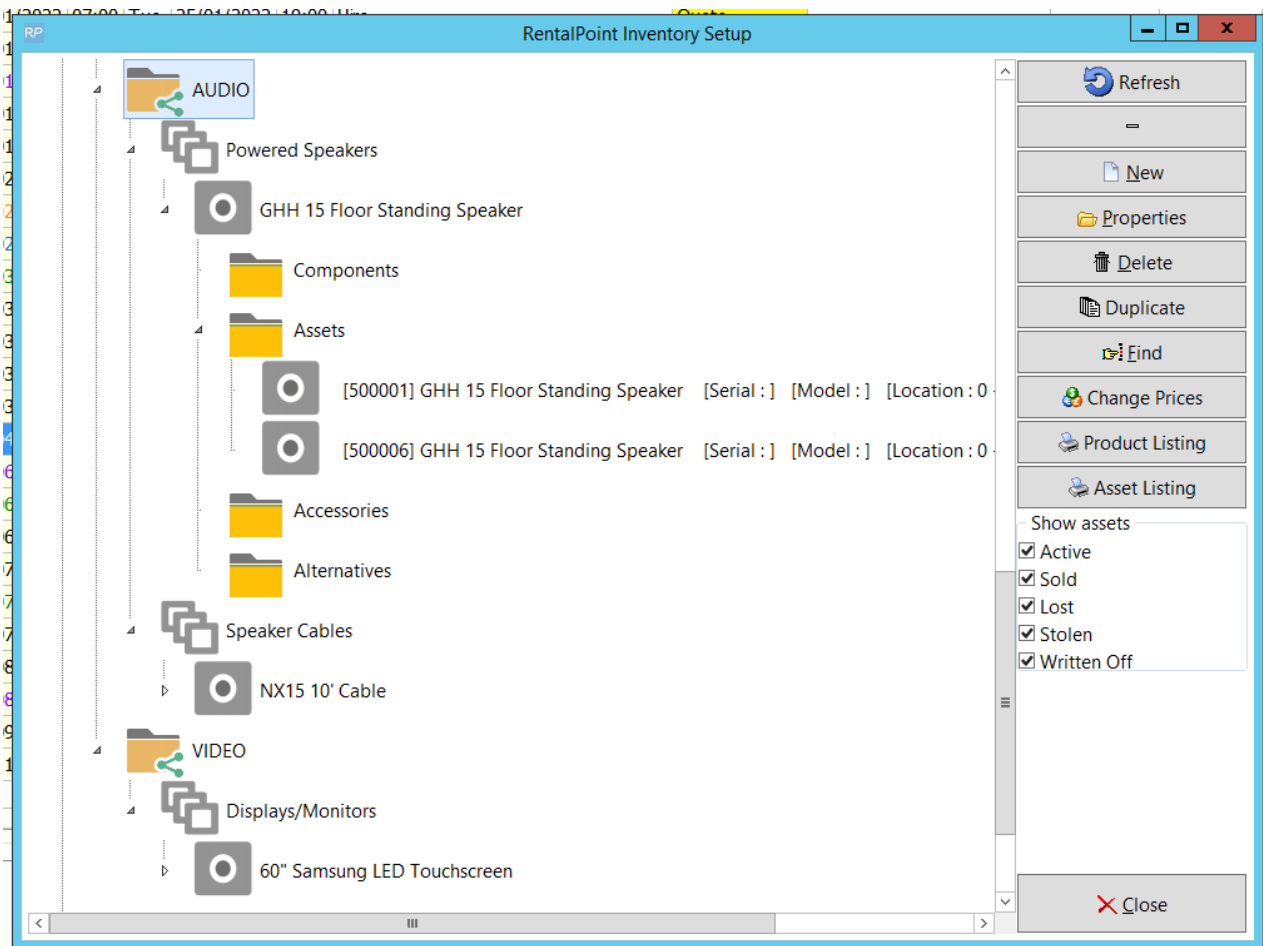
wait to get this message, then click OK

RentalPoint 11.0 Enterprise

Import complete.

OK

Check your files in Inventory Setup



Others

[*Click here for more details on Rental/Sales Inventory Management*](#)