


Understanding the Booking Control Panel

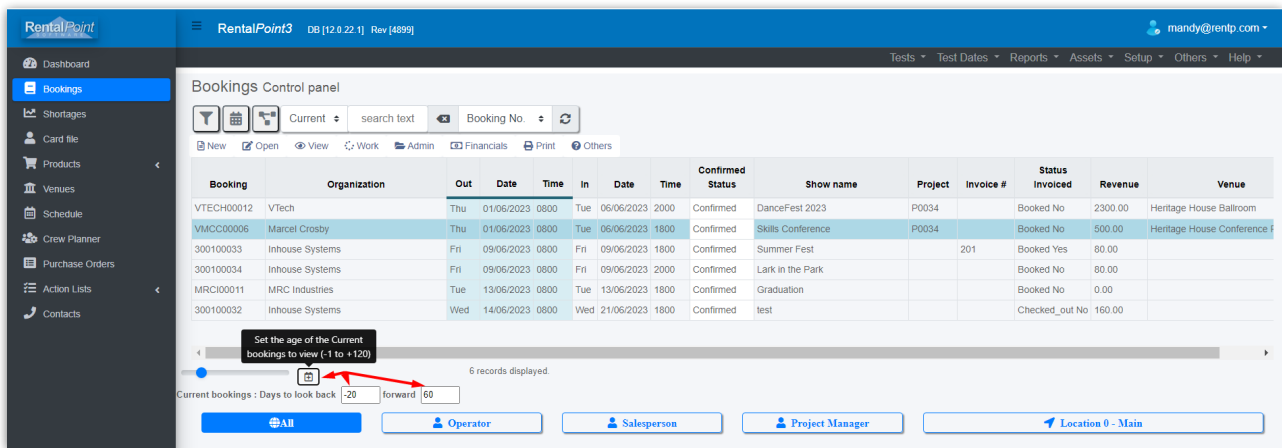
Last Modified on 15/06/2023 10:53 am EDT

AKA the Booking Grid, all Bookings entered into RentalPoint can be accessed from here. Click the tabs below to find out how to narrow your booking scope, organize booking columns, understand colours used and what the icons beside bookings mean.

Scope/Filters

Grid scope is used to customize the range and type of bookings displayed on the grid. This is the window that you will see when you click on the Bookings Menu.

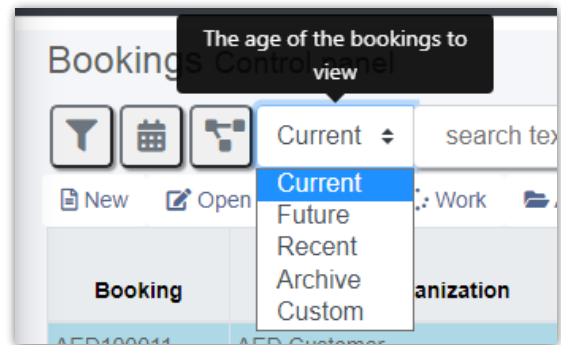
Click the  icon at the bottom of the grid to set the days to look back and forward for current bookings. These values are saved to your browser for future use.



Booking	Organization	Out Date	In Date	Status	Show name	Project	Invoice #	Status Invoiced	Revenue	Venue
VTech00012	VTech	Thu 01/06/2023 0800	Tue 06/06/2023 2000	Confirmed	DanceFest 2023	P0034		Booked No	2300.00	Heritage House Ballroom
VMCC00006	Marcel Crosby	Thu 01/06/2023 0800	Tue 06/06/2023 1800	Confirmed	Skills Conference	P0034		Booked No	500.00	Heritage House Conference
300100033	Inhouse Systems	Fri 09/06/2023 0800	Fri 09/06/2023 1800	Confirmed	Summer Fest		201	Booked Yes	80.00	
300100034	Inhouse Systems	Fri 09/06/2023 0800	Fri 09/06/2023 2000	Confirmed	Lark in the Park			Booked No	80.00	
MRCI00011	MRC Industries	Tue 13/06/2023 0800	Tue 13/06/2023 1800	Confirmed	Graduation			Booked No	0.00	
300100032	Inhouse Systems	Wed 14/06/2023 0800	Wed 21/06/2023 1800	Confirmed	test			Checked_out No	160.00	

Based on the days to look back and forward settings above:

- The **current** window will show bookings for the past 20 days and 60 days forward
- 60+ days are considered **future** bookings, while bookings older than 20 days are considered 'recent'.
- **Archive** is bookings that are archived.
- **Custom** is subject to user entered date range (see below)



Select **Custom** to enter any specific date range of bookings to view, then click



RentalPoint3 DB [12.0.20.4] Rev [4612]

Bookings Control panel

Custom ▾ 2023-02-27 2023-04-27 search text Booking No. ▾

Booking	Organization	Out	Date	Time	In	Date	Time	Booking type
MRCI00009	MRC Industries	Mon	2023/02/27	0800	Fri	2023/03/03	1800	Rental
ABC100077	abc compnay	Tue	2023/02/28	0800	Tue	2023/02/28	1800	Rental

Use the icon to to access filters, next to include or to omit bookings from the display, then for bookings matching the current filters

will re-check ALL filters

Example: The filters below will search for all confirmed rental booking with a status of booked or pulled that require crew assignments

localhost/rpmvc/Bookings

Bookings Control panel

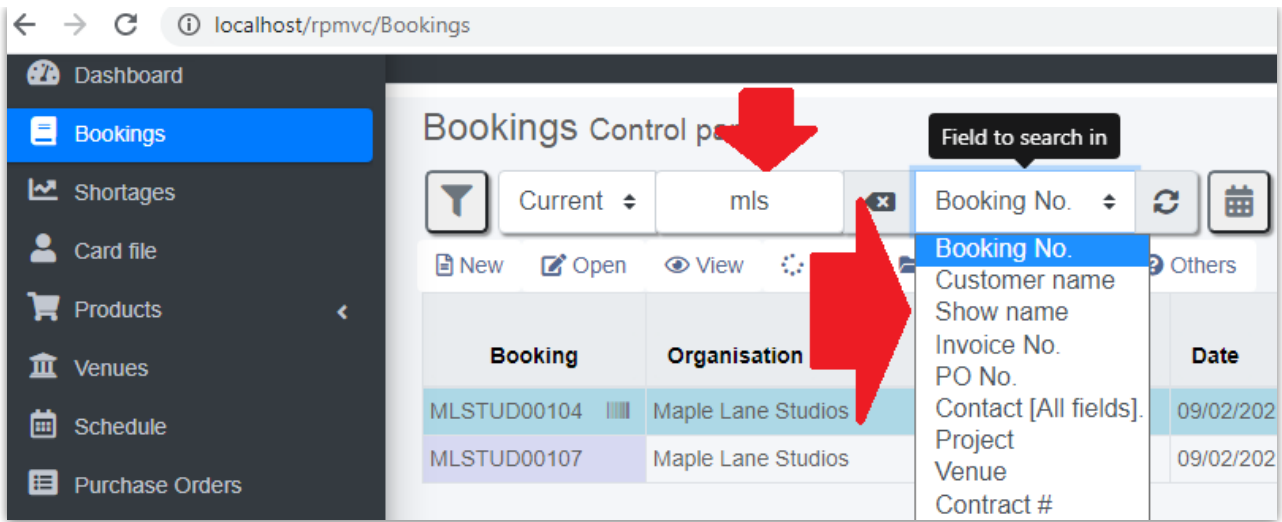
Current ▾ search text Booking No. ▾

Booking	Organisation
MLSTUD00104	Maple Lane Studios
MLSTUD00107	Maple Lane Studios

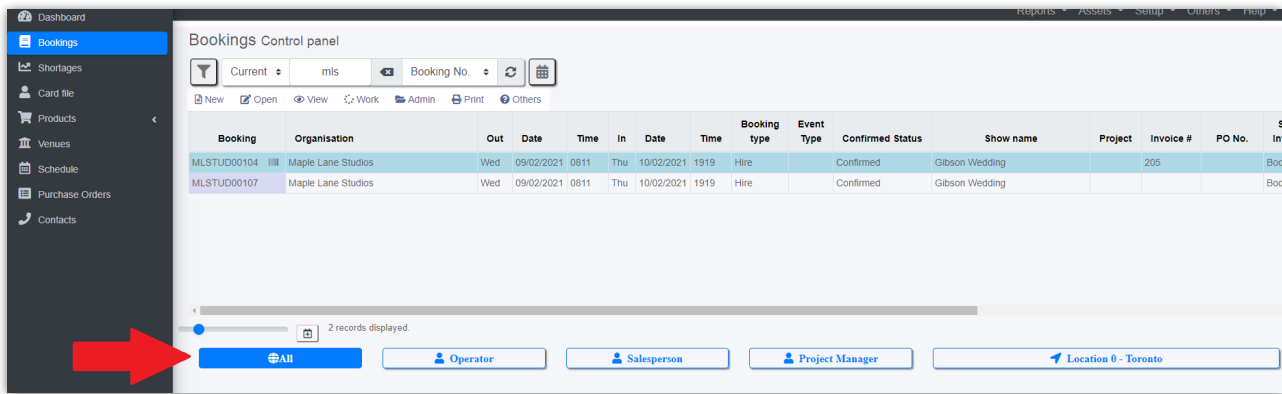
Filters

Confirmation	Type	Status	Invoice	Crew
<input type="checkbox"/> Quotes	<input checked="" type="checkbox"/> Hire	<input checked="" type="checkbox"/> Booked	<input checked="" type="checkbox"/> Invoiced	<input type="checkbox"/> Crew Not Required
<input type="checkbox"/> Light Pencil	<input type="checkbox"/> Sales	<input checked="" type="checkbox"/> Pull	<input checked="" type="checkbox"/> Uninvoiced	<input checked="" type="checkbox"/> Crew Required
<input type="checkbox"/> Heavy Pencil	<input type="checkbox"/> Sub-Hire	<input type="checkbox"/> Out	<input checked="" type="checkbox"/> Complete	<input type="checkbox"/> Crew Assigned
<input checked="" type="checkbox"/> Confirmed	<input type="checkbox"/> Cycle Billed	<input type="checkbox"/> Returned		
<input type="checkbox"/> Cancelled	<input type="checkbox"/> Transfers			

Search Text relevant to a particular field.....



and booking scope relevant to current operator/salesperson/project manager/location/all

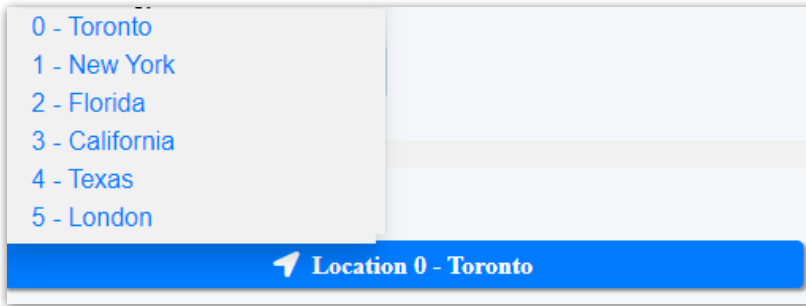


All Bookings displayed are from ALL Operators, Sales Persons, Project Managers for the selected Location

Operator Search is narrowed to operator currently logged in

Salesperson Search is narrowed by selected Salesperson and the bookings that Salesperson is assigned to

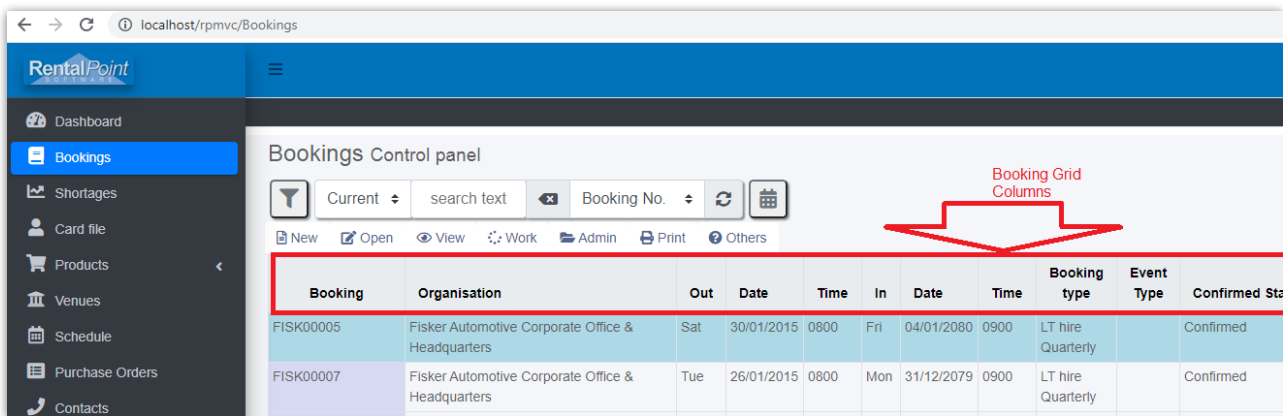
Project Manager Search is narrowed by selected Project Manager and the bookings that Project Manager is assigned to



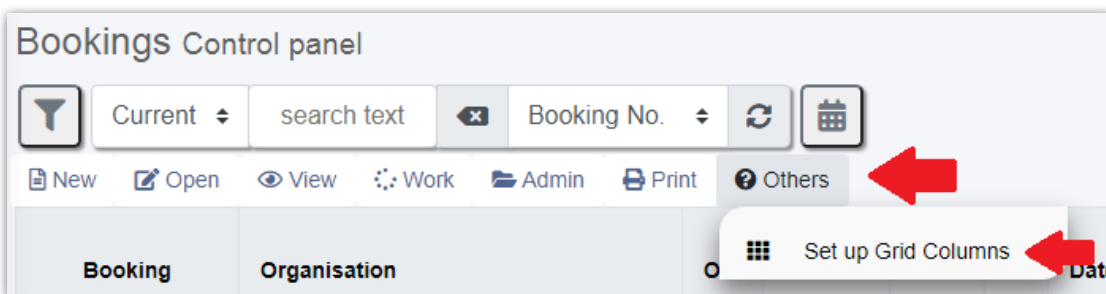
Search is narrowed by selected Location and the bookings that are assigned to that Location

Column Order

Booking Grid column headings are found at the top of the Booking Grid and are used to summarize the bookings displayed on the grid.



Customize Grid Columns to your preferred order via the **Set up Grid Columns** option



Also available via right click menu option from the booking grid


New	▶		Wed	09/02/202
Open	▶		Tue	25/01/202
View	▶		Wed	09/02/202
Work	▶		Wed	09/02/202
Admin	▶		Wed	09/02/202
Financials	▶		Wed	09/02/202
Print	▶		Wed	09/02/202
Others	▶	Set up Grid Columns		
Refresh	▶		Wed	09/02/202

Move the grid columns using the   keys, then click 

			
	Booking		
	Organisation		
	Out Date		
	Return Date		
	Booking Type		
	Event type		
	Confirmed Status		
	Show Name		
	Project		
	Invoice No.		
	PO #		
	Status		
	Crew status		
	Project Manager		
	Revenue		
	Venue		
	Original operator		

Bookings Locked for Editing

Bookings Locked for Editing

A Lock icon  beside any booking on the Booking Grid identifies bookings that are currently being edited by other users.

RentalPoint SOFTWARE

Dashboard

Bookings

Shortages

Card file

Products

Venues

Schedule

Purchase Orders

Contacts

Bookings Control panel


Current search text Booking No.

New Open View Work Admin Print Others

Booking	Organisation	Out	Date	Time
FISK00005	Fisker Automotive Corporate Office & Headquarters	Sat	30/01/2015	080
FISK00007	Fisker Automotive Corporate Office & Headquarters	Tue	26/01/2015	080

Multi-User Access



Booking Tab Access (Fig A below) is used in RentalPoint to separate out booking content for the purpose of multi user editing (i.e. allowing more than one user access to edit the same booking at the same time). From the Booking Grid, click on any booking (even if it is identified as locked) to see the Booking Tab screen. Hover over any tab for summary of tab content and/or to open the booking tab (Fig C below).

The booking Dashboard shows a red lock icon  if a tab is locked (Fig B below). Access to locked tabs is denied until the lock is released (i.e. the user locking the tab releases it by exiting that tab)




User Access Levels

The first person to open a booking has **exclusive access** to that booking, with ability to update all fields. Other users may edit and update isolated sections of the booking with non-exclusive access as outlined below.





With the exception of the **Equipment** tab which supports **heading locks**, when a booking tab is open, it is considered  locked for editing, preventing access to that tab by other users for the duration of the edit. The lock is released  once the user exits the tab. Unlocked tabs for the same booking, may be opened and edited without issue.

Exclusive Access is required for...

- Changes to dates and times on the calendar tab of the booking affects both equipment pricing and reservation. Therefore all dates, times and confirmation status are disabled from editing when the user does not have exclusive access (*i.e. is not the first person to open the booking*).

Exclusive access to this booking is required before changes can be made to this tab. 

Timeline

- Tuesday 15/02/2022 08:00 AM  
- Wednesday 16/02/2022 05:00 PM  

Warehouse Out


Warehouse In

- Changing the status of the booking requires exclusive access since it affects equipment reservation and therefore equipment availability.

Status

Confirmed Status


- Quote
- Light Pencil
- Heavy Pencil
- Confirmed
- Cancelled




Exclusive access to the booking is required before the confirmed status can be changed

Bookings Locked for Scanning

What is it?

Bookings 'Locked for Scanning' are identified with a  barcode icon against the booking number on the Booking Grid

MLSTU **Locked for scanning** lane Studios

MLSTUD00104  Maple Lane Studios

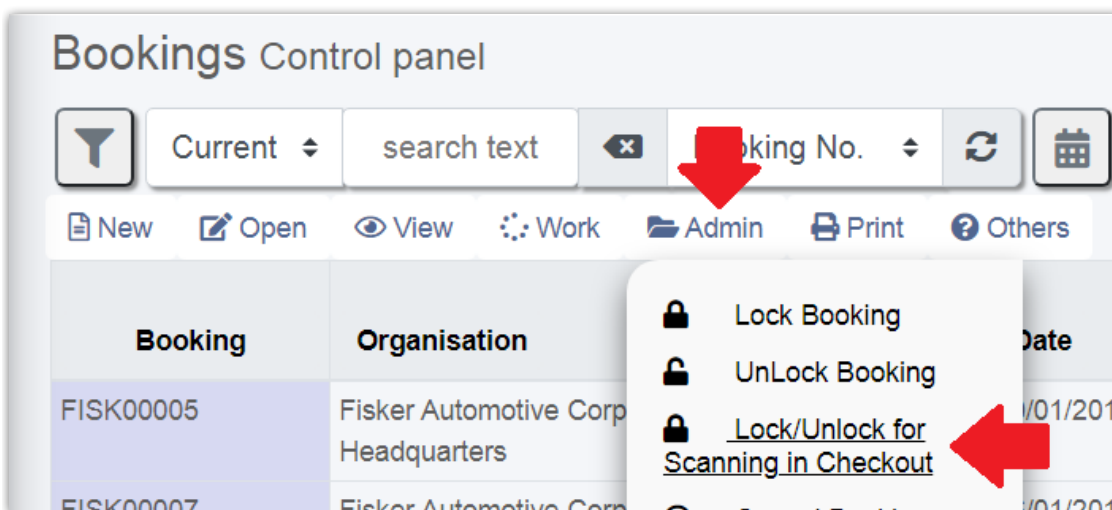
This functionality is generally used to affect a higher level of control over the warehouse checkout process, proving especially useful when cross rentals are checked out to a booking.

Sample scenario:

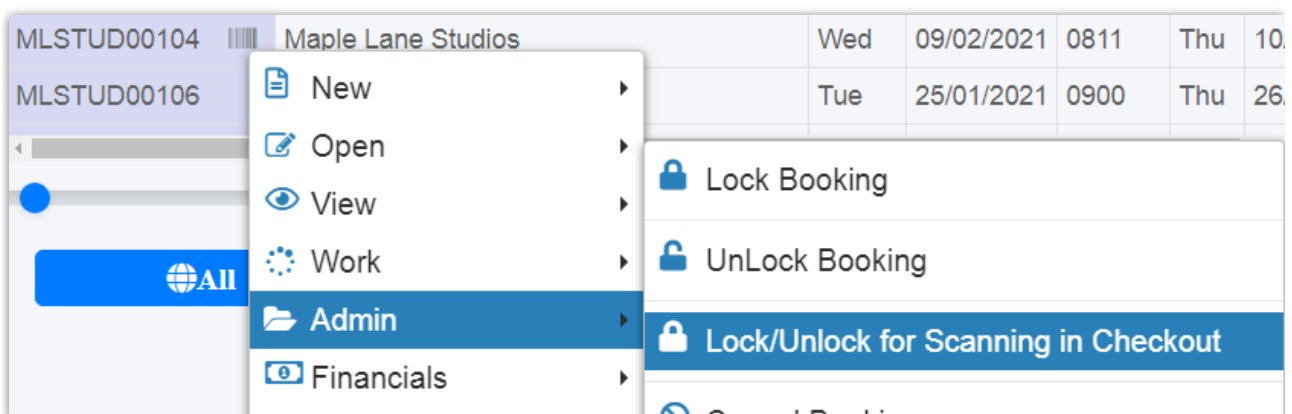
- Cross rental gear for a booking arrives from the vendor with the vendors barcode attached for their tracking purposes.
 - Your warehouse staff check the gear out to the booking it is rented against incorrectly using the vendor barcode.
 - A problem arises if the vendor barcode happens to match a code you use in your own warehouse for a totally different piece of gear. While the 'added item' is flagged at checkout, it could be ignored/overlooked on checkout resulting in incorrect inventory accounted for on the booking, possible shortages on other bookings and cross rented gear that is not properly checked out to the booking.

How is it used?

First highlight the booking, then Access the Admin menu to find the Lock/Unlock for scanning option.



Also available from the right click menu



Operator Privileges

All/deny users access to this functionality via the following Operator privileges (Setup-->Operators-->Utilities tab)

Locking
<input checked="" type="checkbox"/> Can Remove an Administrative Lockout
<input checked="" type="checkbox"/> Can Create Owner-only Locks
<input checked="" type="checkbox"/> Can Unlock a Booking
<input checked="" type="checkbox"/> Can Lock/Unlock Booking for Scanning in Checkout
<input checked="" type="checkbox"/> Can Lock/Unlock Sub rental for Scanning in Checkout

Parameters

Operational Parameter #206 'Lock booking for scanning on final checkout'

When enabled, all bookings will be locked for scanning when a final checkout is saved against the booking.

Once locked for scanning, no more items can be checked out against the booking unless it is first 'unlocked for scanning/checkout' by a user with that operator privilege.

When a booking is locked for scanning, the 'Enter Barcodes' Tab will not appear as an option in the checkout window.

Include/Omit Columns

Rentalpoint offers the ability to hide some columns from the booking grid

Access this option in parameter setup-->Custom viewing

Check the field you want to see on the booking grid – all unchecked fields will be hidden from view.

RP RentalPoint Custom Viewing Options x

Booking Grid | User Interface | Customer Information | Venue Information | Equipment Grid

<input checked="" type="checkbox"/> Invoice No.	<input checked="" type="checkbox"/> Venue	<input checked="" type="checkbox"/> Booking Type	<input type="checkbox"/> Date Added
<input type="checkbox"/> Confirm Date	<input checked="" type="checkbox"/> Crew Status	<input checked="" type="checkbox"/> Original Operator	<input checked="" type="checkbox"/> Event Type
<input checked="" type="checkbox"/> PO #	<input type="checkbox"/> Salesperson	<input type="checkbox"/> Division	<input type="checkbox"/> Contract No
<input checked="" type="checkbox"/> Invoiced Status	<input checked="" type="checkbox"/> Revenue	<input checked="" type="checkbox"/> Project Manager	<input type="checkbox"/> Payment Terms

Progress Status

Select the colours that each status will display in :

<input type="checkbox"/> Quote	<input type="checkbox"/> Heavy Pencil	<input type="checkbox"/> Cancelled
<input type="checkbox"/> Light Pencil	<input type="checkbox"/> Confirmed	

Colour Code Status

<input type="checkbox"/> Booked	<input type="checkbox"/> Returned (Complete)	<input type="checkbox"/> Returned (Complete) and NOT invoiced
<input type="checkbox"/> Pull	<input type="checkbox"/> Bookings With No Status	<input type="checkbox"/> Invoiced
<input type="checkbox"/> Out		

Enable Separate Colour Code Status for Cross Rentals

Cross Rentals

OK

RP RentalPoint Custom Viewing Options ✕

Booking Grid | User Interface | Customer Information | Venue Information | Equipment Grid

<input checked="" type="checkbox"/> Projects	<input checked="" type="checkbox"/> Show Name
<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Security Deposit
<input checked="" type="checkbox"/> Crew	<input checked="" type="checkbox"/> Financials
<input checked="" type="checkbox"/> Truck Schedule	<input checked="" type="checkbox"/> Product Part Numbers
<input checked="" type="checkbox"/> Show user list at logon	<input checked="" type="checkbox"/> Booking Status Tab
<input type="checkbox"/> Workflows	

Advanced Customer Search

Allows for more precise customer searches. Recommended for companies with a large customer base.

Configure Tab Visibility, Naming Order in Modify-Booking (Enquiry) Window

OK

RP Enquiry Tab Display Order and Names

Default Tab Name	Tab Display Name	Tab Order
Customer	Customer	Customer
Calendar	Calendar	Calendar
Equipment	Gear	Gear
Crew	Labour	Labour
Venue	Venue	Venue
Notes	Notes	Notes
Payments	Payments	Payments
Attachments	Attachments	Attachments
Not In Use	Not In Use (1)	Not In Use (1)
Other Details	Other Details	Other Details
Status	Status	Status
Not In Use	Not In Use (2)	Not In Use (2)
Followup	Followup	Followup

Reset Defaults OK Cancel

Status Column

The first word in the status column describes the bookings warehouse status as 'Booked', 'Out' or 'Returned'

The second word describes the bookings invoice status as 'NO' - Not Fully Invoiced or 'YES' - Fully Invoiced

Bookings Control panel

Current search text Booking No.

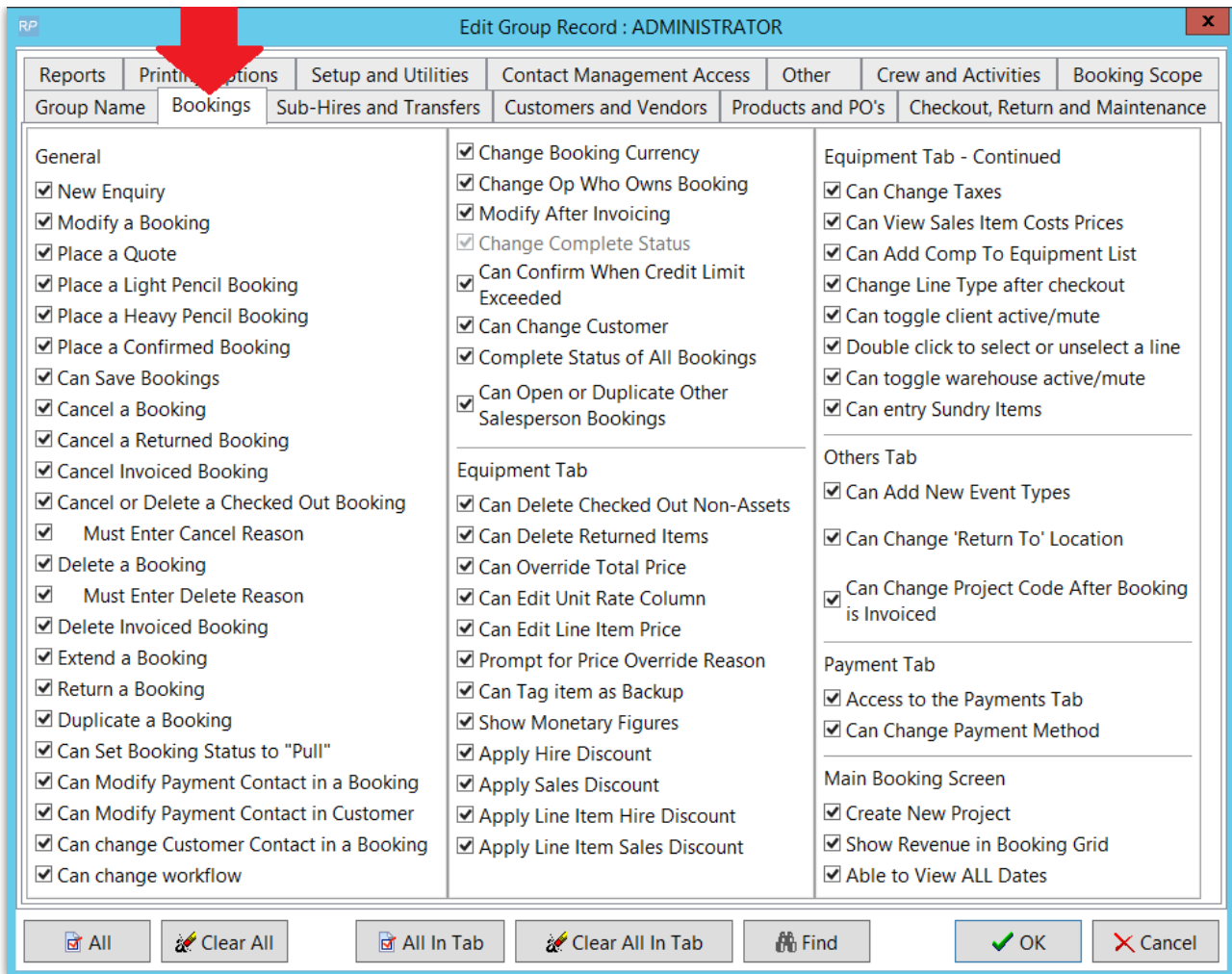
New Open View Work Admin Others

Booking	Show name	Status Invoiced	Organisation	Out	Date	Time	In	Date	Time	Booking type	Event Type	Confirmed Status	Project	Invoice #
MLSTUD00104	Gibson Wedding	Booked Yes	Maple Lane Studios	Tue	08/02/2021	0811	Thu	10/02/2021	1919	Hire		Confirmed		205
MLSTUD00107	Gibson Wedding	Booked No	Maple Lane Studios	Wed	09/02/2021	0811	Thu	10/02/2021	1919	Hire		Confirmed		
MLSTUD00119	Gibson Wedding	Booked No	Maple Lane Studios	Wed	09/02/2021	0811	Thu	10/02/2021	1919	Hire		Confirmed		205
WATBUS00010	Gibson Wedding	Booked No	Waterloo Business Solutions	Wed	18/05/2021	0811	Thu	19/05/2021	1919	Hire		Confirmed	MYTEST2	
WATBUS00012	Gibson Wedding	Booked No	Waterloo Business Solutions	Sat	21/05/2021	0811	Tue	31/05/2021	1919	Hire		Confirmed		
WOOLPERT00005		Returned No	WOOLPERT LABS	Tue	26/01/2015	0800	Mon	31/12/2019	0900	LT hire 28		Confirmed		

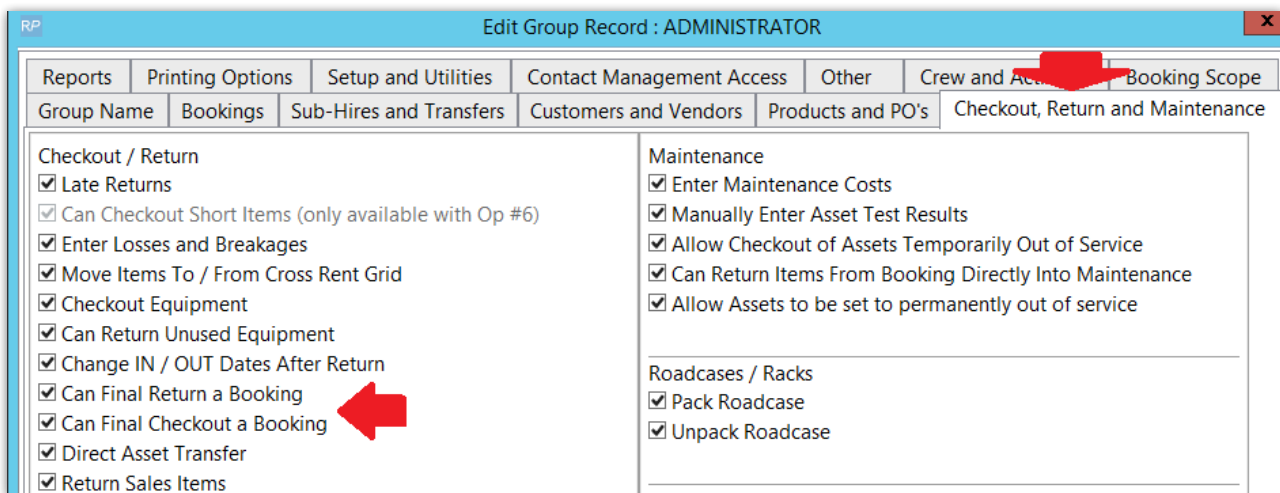
Operator Privileges

Access via Setup-->operators-->edit operator group

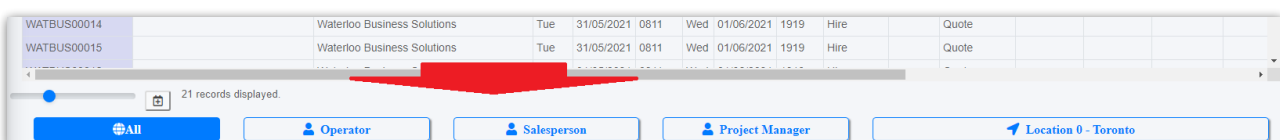
Limit user access to booking functionality via the Bookings Tab, uncheck any option you wish to block user access to.



Limit user ability to checkout/return bookings via the 'Checkout/Return and Maintenance' tab



Limit user scope (at the bottom of the booking grid) via options on the Booking Scope tab



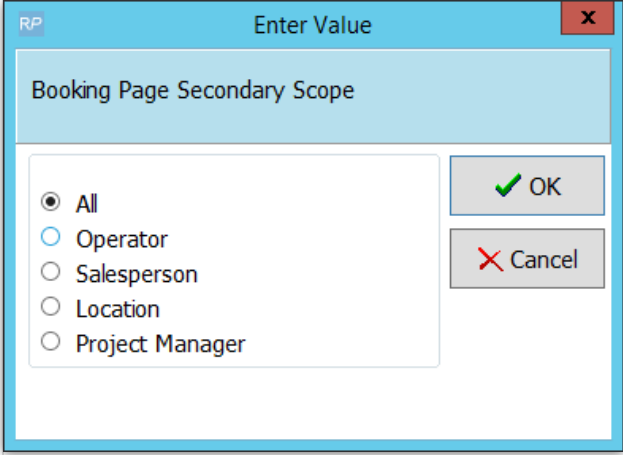
RP Edit Group Record : ADMINISTRATOR

Group Name	Bookings	Sub-Hires and Transfers	Customers and Vendors	Products and PO's	Checkout, Return and	Invoice
Reports	Printing Options	Setup and Utilities	Contact Management Access	Other	Crew and Activities	Booking Scope

Booking Scope Options

- Allow access to all Salesperson bookings (do not restrict to operator's default Salesperson)
- Allow access to all Project Manager bookings (do not restrict to operator's default Project Manager)
- Select Salesperson Scope
- Can Change Salesperson
- Select Project Manager Scope
- Can Change Project Manager
- Select Location Scope
- Can Change Location

Parameters

Operational Parameter #3 'Booking Grid Primary Scope'	Default sort order for the Booking Grid
Operational Parameter #13 'Booking Grid Secondary Scope'	

Operational Parameter #124

RP Enter Value x

Default 'All Dates' Checkbox on Projects Tab to :

Not Checked Checked

✓ OK ✗ Cancel

RP Enter Value x

Sort Project Treeview By :

Project Code Project Description

✓ OK ✗ Cancel