


Understanding the Booking Control Panel

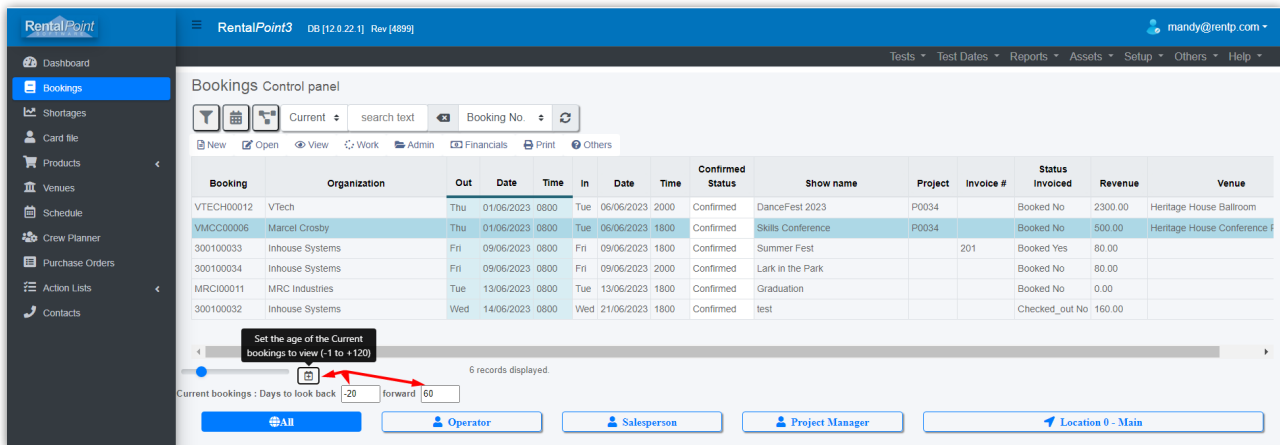
Last Modified on 05/06/2025 9:22 am EDT

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

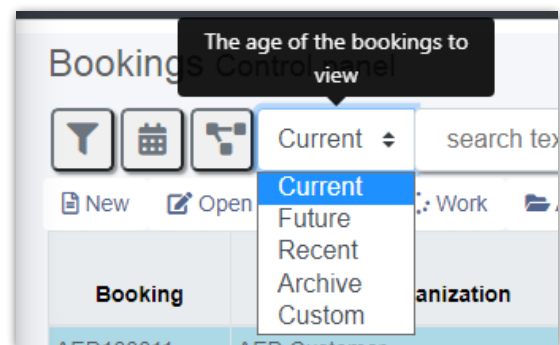
Grid scope is used to customize the range and type of bookings displayed on the grid. This is the window that you will see when you click on the Bookings Menu.

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.



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.

New

Open

View

Work



Admin

Financials

Print

Others

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  Search 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

RentalPoint

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
MLSTUD00104	Maple Lane Studios
MLSTUD00107	Maple Lane Studios

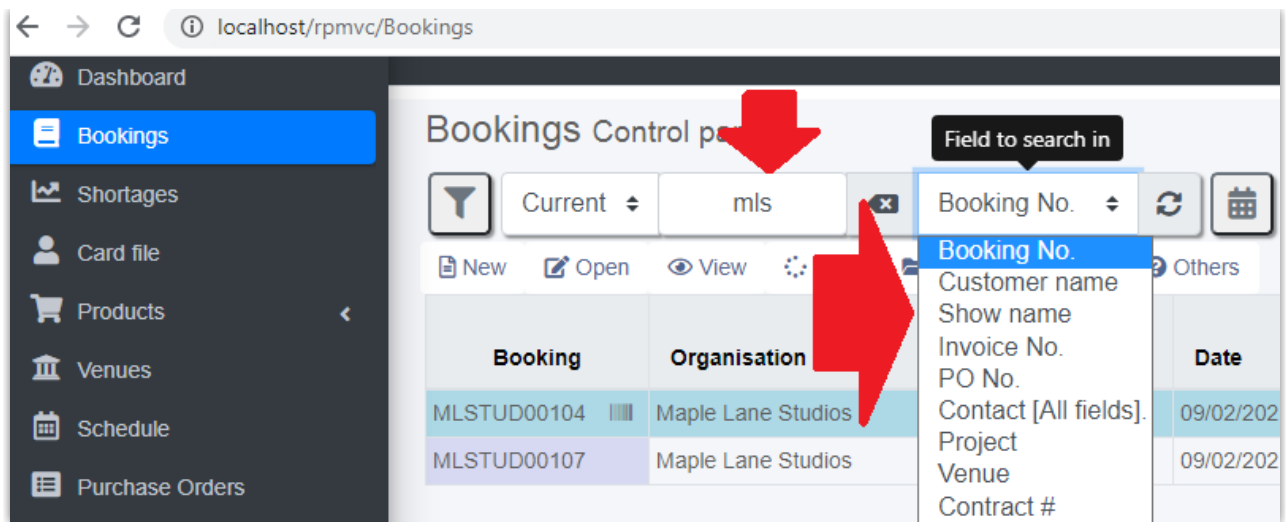
Filters

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			

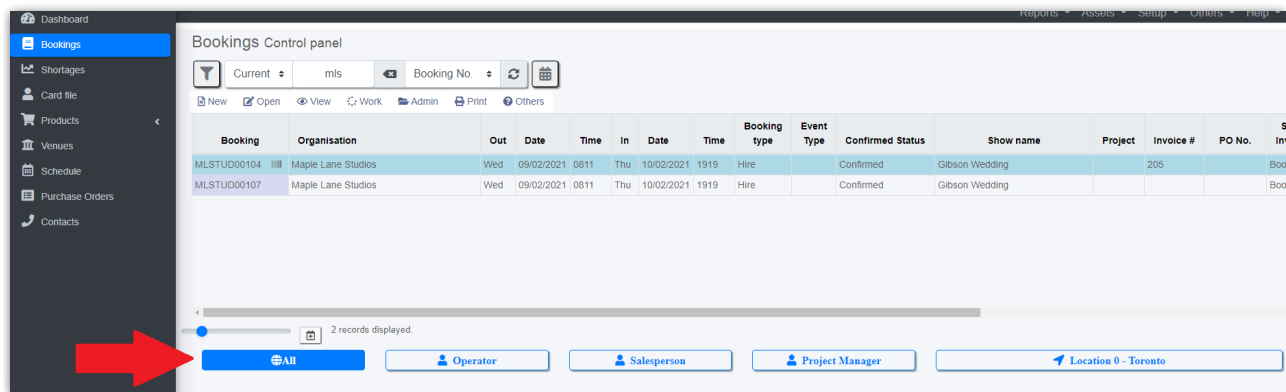
✓ All

Search

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

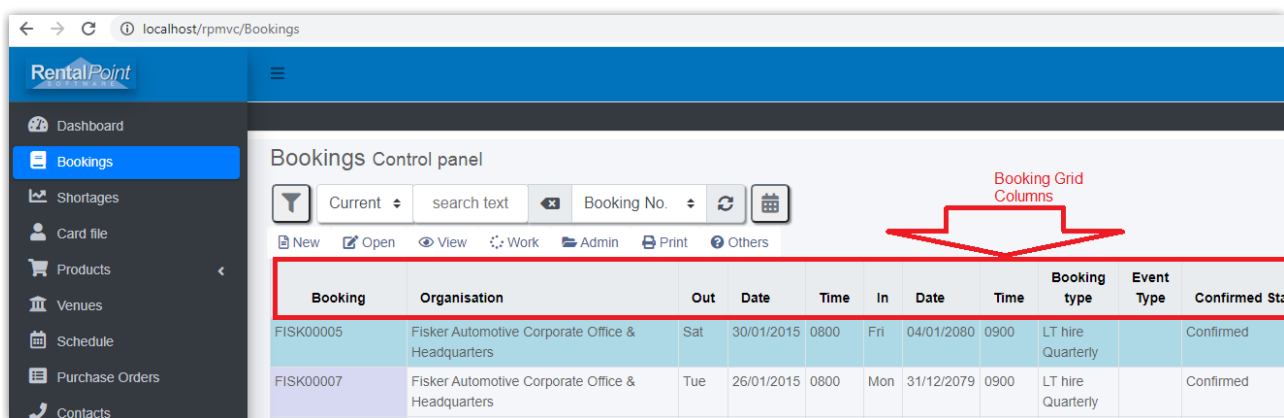
Salesperson Search is narrowed by selected Salesperson and the bookings that Salesperson is assigned to

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

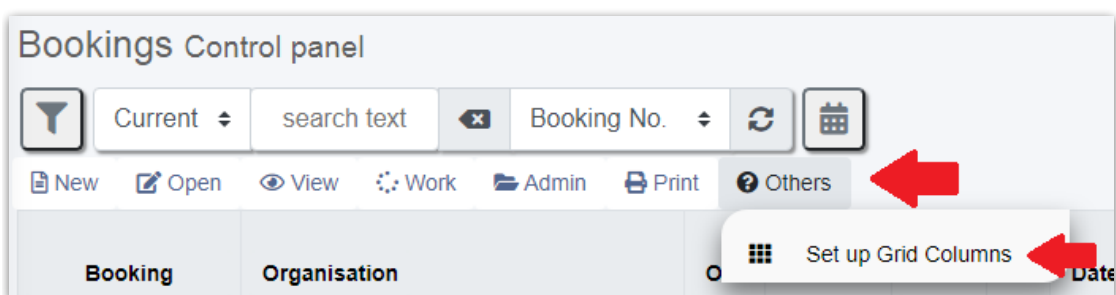
Booking Grid column headings are found at the top of the Booking Grid and are used to summarize the bookings displayed on the grid.



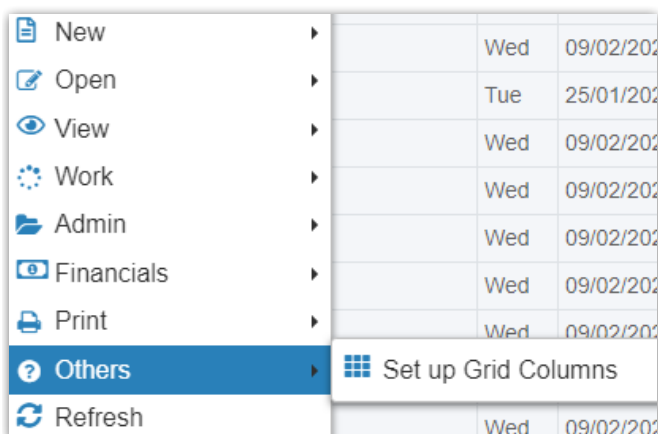
Booking Grid Columns

Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Event Type	Confirmed Sta
FISK00005	Fisker Automotive Corporate Office & Headquarters	Sat	30/01/2015	0800	Fri	04/01/2080	0900	LT hire Quarterly		Confirmed
FISK00007	Fisker Automotive Corporate Office & Headquarters	Tue	26/01/2015	0800	Mon	31/12/2079	0900	LT hire Quarterly		Confirmed

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

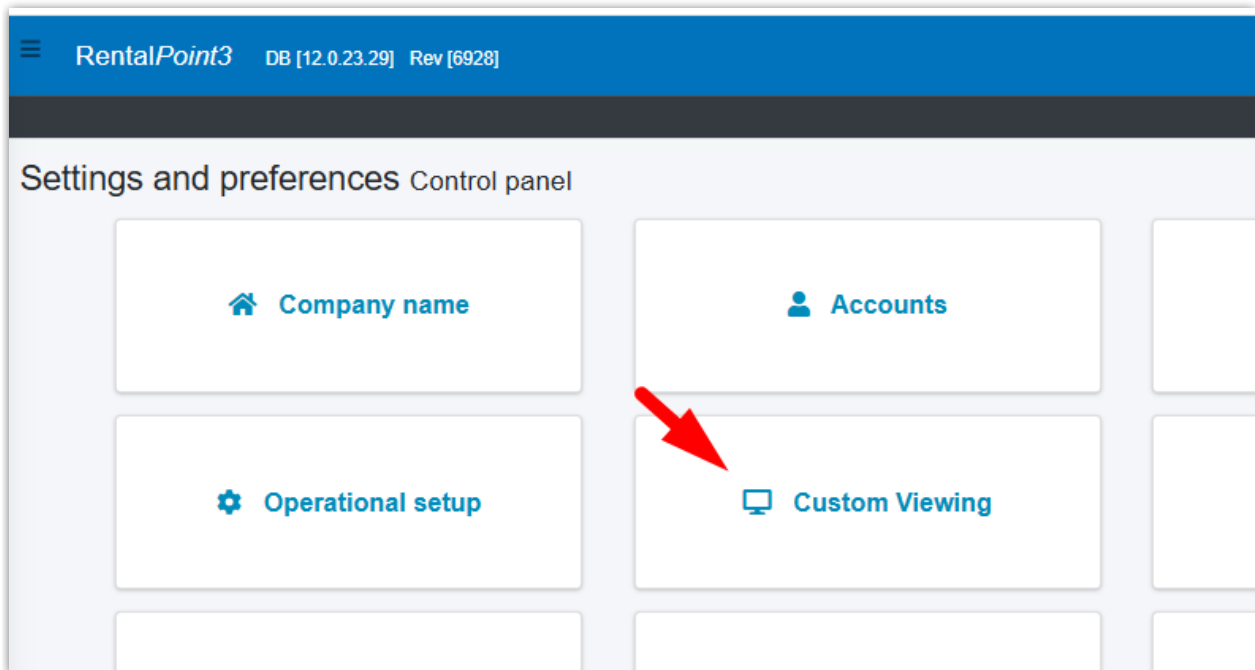
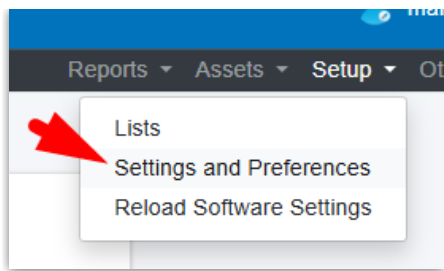


Move the grid columns using the




keys, then click

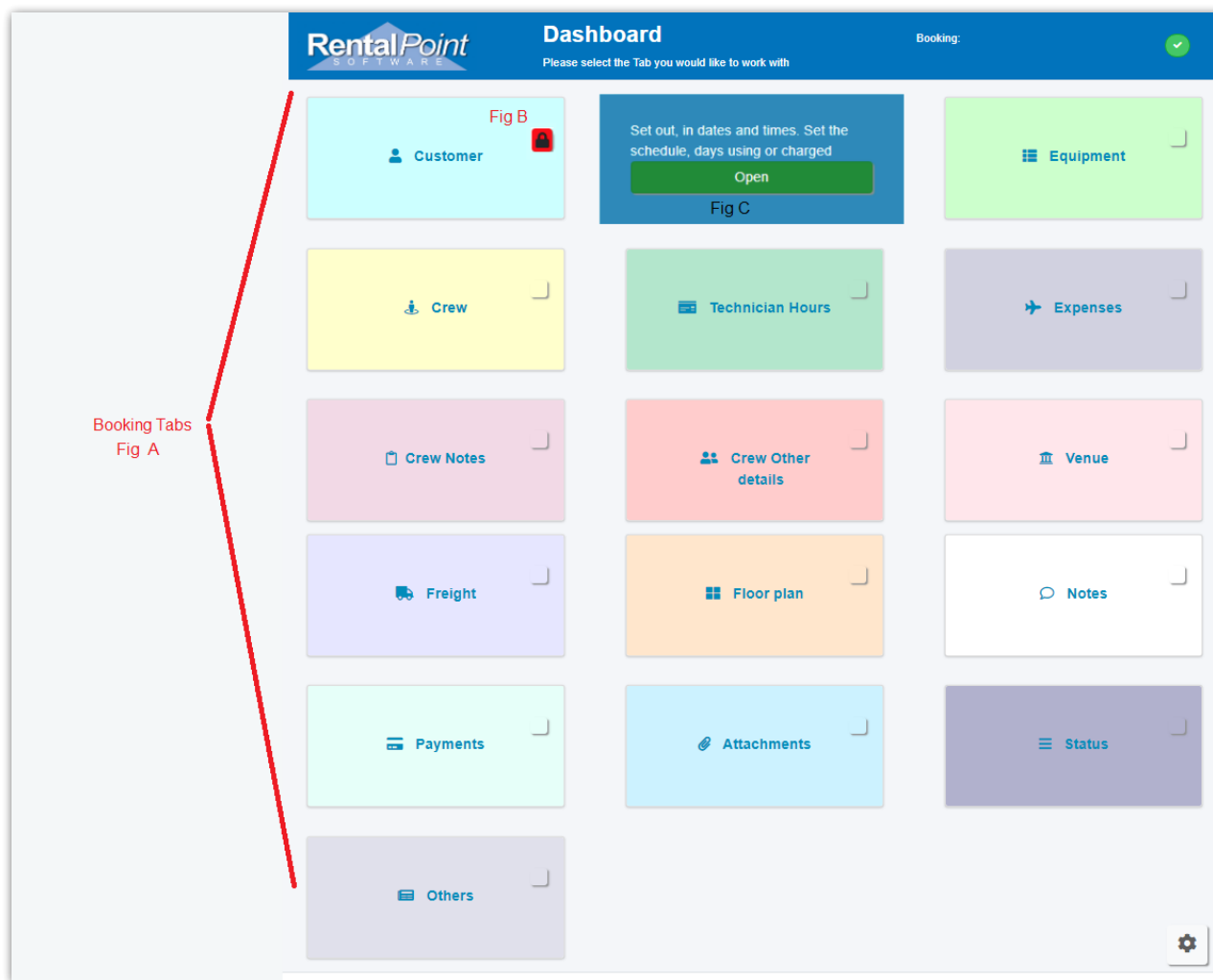




Multi-User Access



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

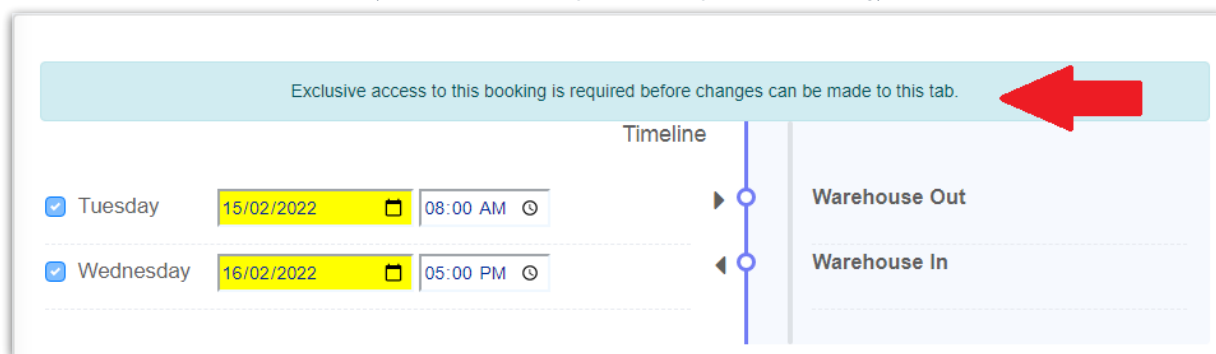
The first person to open a booking has **exclusive access** to that booking, with ability to update all fields. Other users may edit and update isolated sections of the booking with non-exclusive access as outlined below.


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).

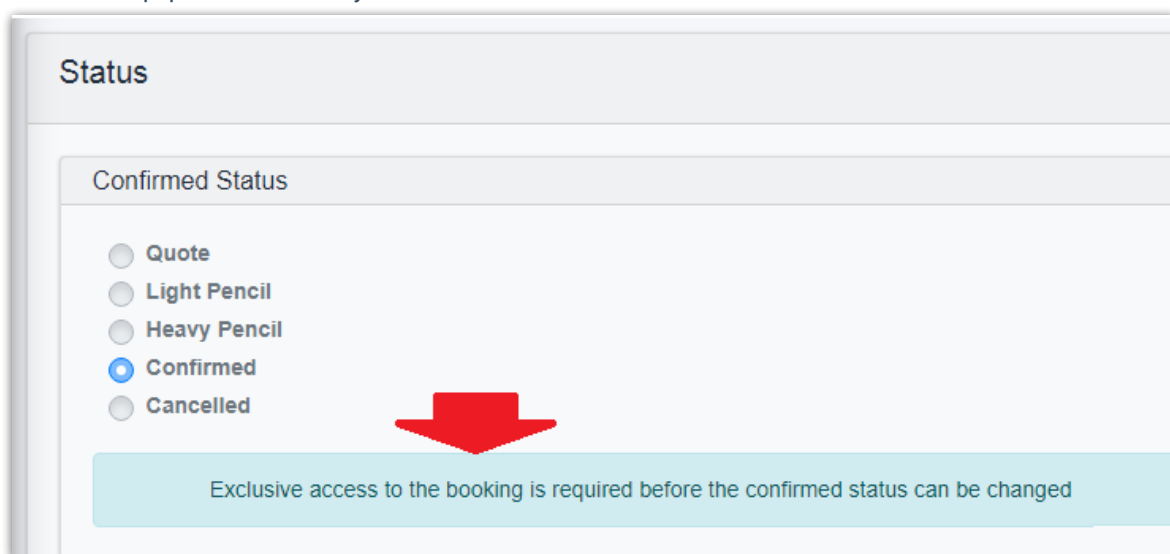


Exclusive access to this booking is required before changes can be made to this tab. 

Timeline

<input checked="" type="checkbox"/> Tuesday	15/02/2022 	08:00 AM 	▶	○	Warehouse Out
<input checked="" type="checkbox"/> Wednesday	16/02/2022 	05:00 PM 	◀	○	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

Bookings Locked for Scanning

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

RentalPoint3 DB [12.0.23.5] Rev [6145]

Bookings Control panel

Current search text Booking No.

New Open View Work Admin Financials Print Other

Booking	Organisation	Out	Date	Time	In
MYTEST00027	MyTest	Fri	2024/06/14	0901	Sun
MYTEST00042	MyTest	Sun	2024/06/23	1300	Mon

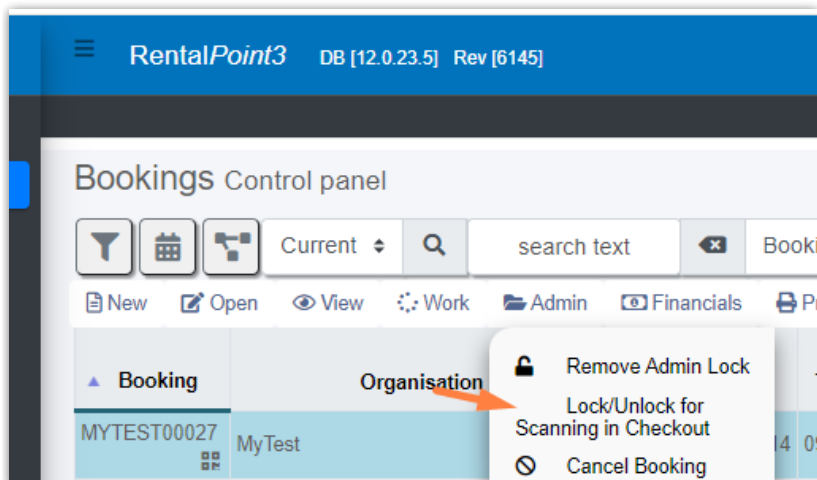
This functionality is generally used to affect a higher level of control over the warehouse checkout process, proving especially useful when cross rentals are checked out to a booking.

Sample scenario:

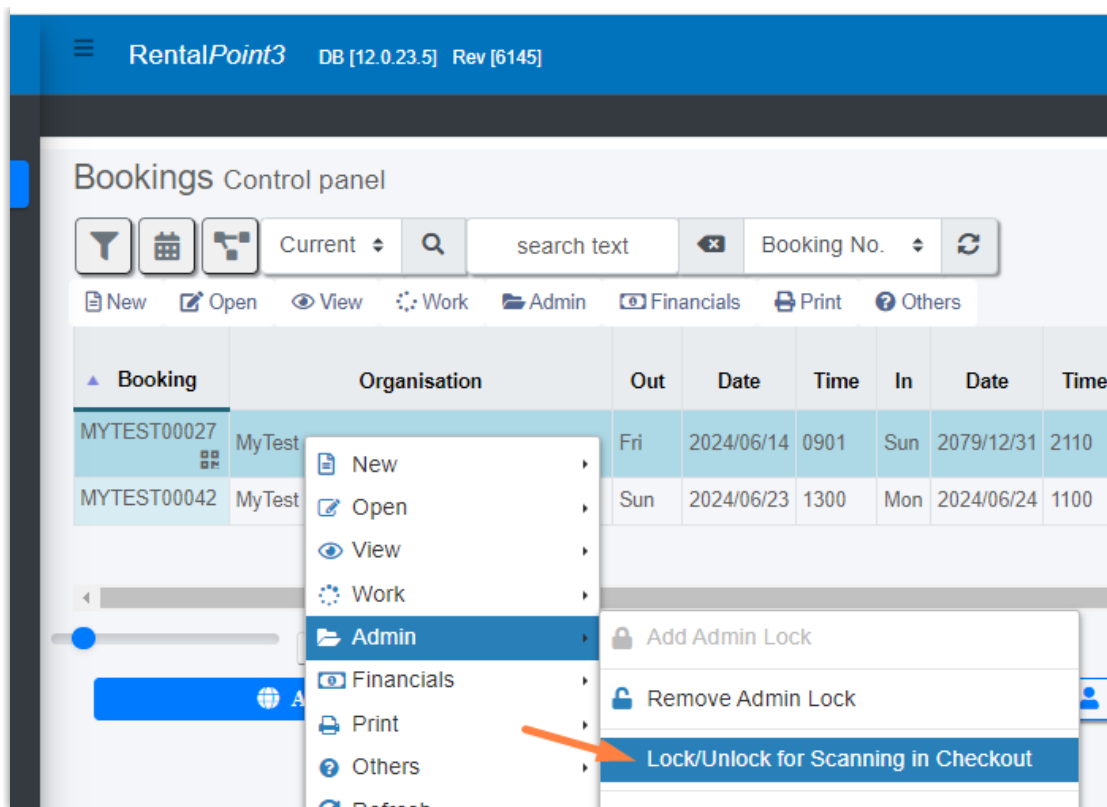
- Cross rental gear for a booking arrives from the vendor with the vendors barcode attached for their tracking purposes.
 - Your warehouse staff check the gear out to the booking it is rented against incorrectly using the vendor barcode.
 - A problem arises if the vendor barcode happens to match a code 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 by an operator, 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.

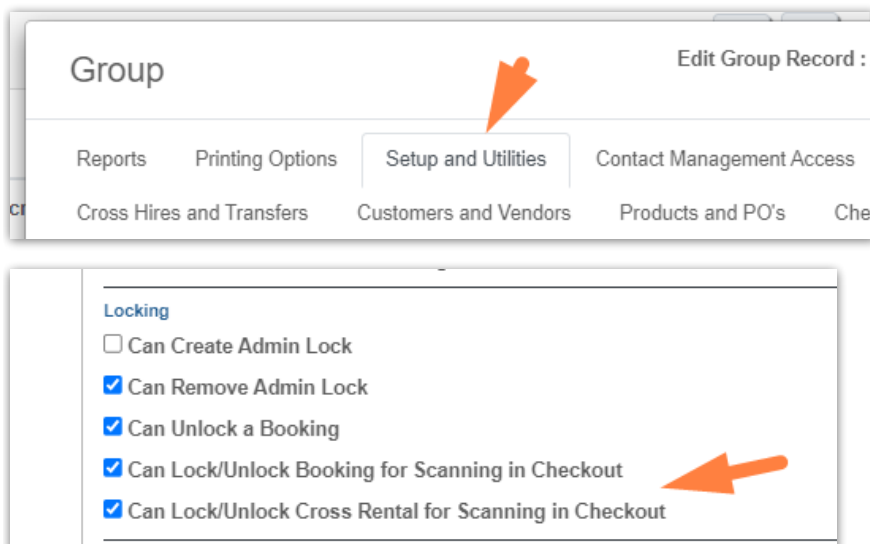


Also available from the right click menu



Operator Privileges

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



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.

The screenshot shows the 'RentalPoint Custom Viewing Options' dialog box with the 'Booking Grid' tab selected. The dialog is divided into two main sections: 'Booking Grid' and 'User Interface'. The 'Booking Grid' section contains a list of fields with checkboxes to include or omit them from the booking grid. The 'User Interface' section contains options for displaying progress status and color codes.

Field	Checked
Numéro de facture	Yes
Confirm Date	No
PO #	Yes
Invoiced Status	Yes
Venue	Yes
Crew Status	No
Salesperson	Yes
Revenue	Yes
Booking Type	No
Original Operator	No
Division	No
Project Manager	No
Date Added	No
Event Type	Yes
Payment Terms	No

Progress Status

Select the colours that each status will display in :

Status	Color
Quote	Yellow
Light Pencil	Light Blue
Heavy Pencil	Orange
Confirmed	Green
Cancelled	Pink

Colour Code Status

Status	Color
Booked	Dark Blue
Pull	Orange
Out	Red
Returned (Complete)	Dark Green
Bookings With No Status	Black
Bookings returned (or out in the case of sales) but not invoiced will show in this color	Light Green
Invoiced	Purple

Separate Colour for Cross Rentals and Transfers

Category	Color
Cross Rentals	Purple
Transfers	Blue

Buttons: [Green Checkmark] [Red X]

The screenshot shows the 'RentalPoint Custom Viewing Options' dialog box with the 'User Interface' tab selected. The dialog is divided into two main sections: 'Booking Grid' and 'User Interface'. The 'User Interface' section contains a list of fields with checkboxes to include or omit them from the user interface.

Field	Checked
Projects	No
Workflows	Yes
Security Deposit	No
Financials	No

Buttons: [Green Checkmark] [Red X]

RP Edit Group Record : ADMINISTRATOR

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

General

- ☒ New Enquiry
- ☒ Modify a Booking
- ☒ Place a Quote
- ☒ Place a Light Pencil Booking
- ☒ Place a Heavy Pencil Booking
- ☒ Place a Confirmed Booking
- ☒ Can Save Bookings
- ☒ Cancel a Booking
- ☒ Cancel a Returned Booking
- ☒ Cancel Invoiced Booking
- ☒ Cancel or Delete a Checked Out Booking
- ☒ Must Enter Cancel Reason
- ☒ Delete a Booking
- ☒ Must Enter Delete Reason
- ☒ Delete Invoiced Booking
- ☒ Extend a Booking
- ☒ Return a Booking
- ☒ Duplicate a Booking
- ☒ Can Set Booking Status to "Pull"
- ☒ Can Modify Payment Contact in a Booking
- ☒ Can Modify Payment Contact in Customer
- ☒ Can change Customer Contact in a Booking
- ☒ Can change workflow

- ☒ Change Booking Currency
- ☒ Change Op Who Owns Booking
- ☒ Modify After Invoicing
- ☒ Change Complete Status
- ☒ Can Confirm When Credit Limit Exceeded
- ☒ Can Change Customer
- ☒ Complete Status of All Bookings
- ☒ Can Open or Duplicate Other Salesperson Bookings

Equipment Tab

- ☒ Can Delete Checked Out Non-Assets
- ☒ Can Delete Returned Items
- ☒ Can Override Total Price
- ☒ Can Edit Unit Rate Column
- ☒ Can Edit Line Item Price
- ☒ Prompt for Price Override Reason
- ☒ Can Tag item as Backup
- ☒ Show Monetary Figures
- ☒ Apply Hire Discount
- ☒ Apply Sales Discount
- ☒ Apply Line Item Hire Discount
- ☒ Apply Line Item Sales Discount

Equipment Tab - Continued

- ☒ Can Change Taxes
- ☒ Can View Sales Item Costs Prices
- ☒ Can Add Comp To Equipment List
- ☒ Change Line Type after checkout
- ☒ Can toggle client active/mute
- ☒ Double click to select or unselect a line
- ☒ Can toggle warehouse active/mute
- ☒ Can entry Sundry Items

Others Tab

- ☒ Can Add New Event Types
- ☒ Can Change 'Return To' Location
- ☒ Can Change Project Code After Booking is Invoiced

Payment Tab

- ☒ Access to the Payments Tab
- ☒ Can Change Payment Method

Main Booking Screen

- ☒ Create New Project
- ☒ Show Revenue in Booking Grid
- ☒ Able to View ALL Dates

All

Clear All

All In Tab

Clear All In Tab

Find

OK

Cancel

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

RP Edit Group Record : ADMINISTRATOR

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

Checkout / Return

- ☒ Late Returns
- ☒ Can Checkout Short Items (only available with Op #6)
- ☒ Enter Losses and Breakages
- ☒ Move Items To / From Cross Rent Grid
- ☒ Checkout Equipment
- ☒ Can Return Unused Equipment
- ☒ Change IN / OUT Dates After Return
- ☒ Can Final Return a Booking
- ☒ Can Final Checkout a Booking
- ☒ Direct Asset Transfer
- ☒ Return Sales Items

Maintenance

- ☒ Enter Maintenance Costs
- ☒ Manually Enter Asset Test Results
- ☒ Allow Checkout of Assets Temporarily Out of Service
- ☒ Can Return Items From Booking Directly Into Maintenance
- ☒ Allow Assets to be set to permanently out of service

Roadcases / Racks

- ☒ Pack Roadcase
- ☒ Unpack Roadcase

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

WATBUS00014	Waterloo Business Solutions	Tue	31/05/2021	0811	Wed	01/06/2021	1919	Hire	Quote										
WATBUS00015	Waterloo Business Solutions	Tue	31/05/2021	0811	Wed	01/06/2021	1919	Hire	Quote										

21 records displayed.

All


Operator

Salesperson

Project Manager

Location 0 - Toronto

RP Edit Group Record : ADMINISTRATOR

Group Name	Bookings	Sub-Hires and Transfers	Customers and Vendors	Products and PO's	Checkout, Return and 
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'	<div> <p>RP Enter Value</p> <p>Booking Page Secondary Scope</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> All <input type="radio"/> Operator <input type="radio"/> Salesperson <input type="radio"/> Location <input type="radio"/> Project Manager <p>OK Cancel</p> </div>

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