Understanding the Booking Control Panel

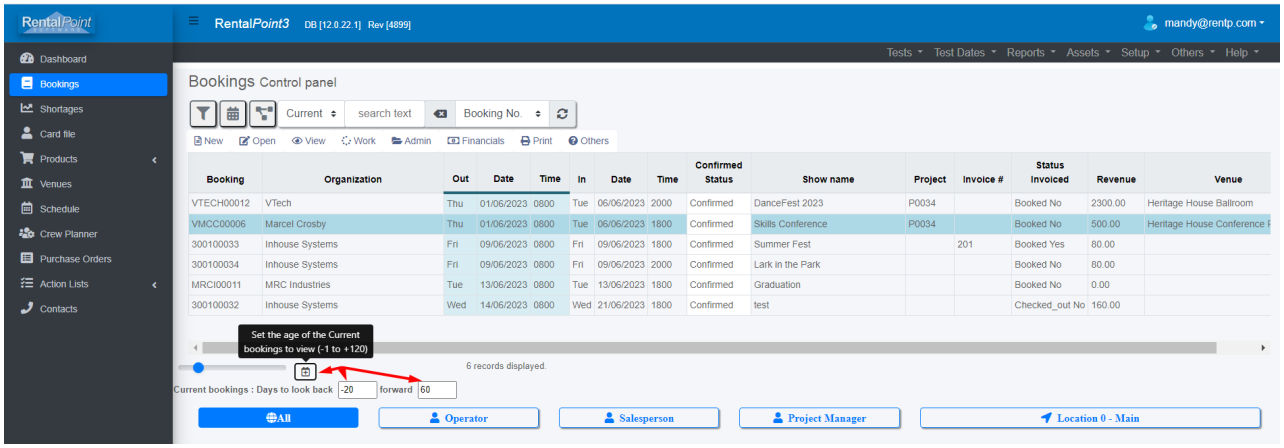
Last Modified on 01/09/2026 10:42 am EDT

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

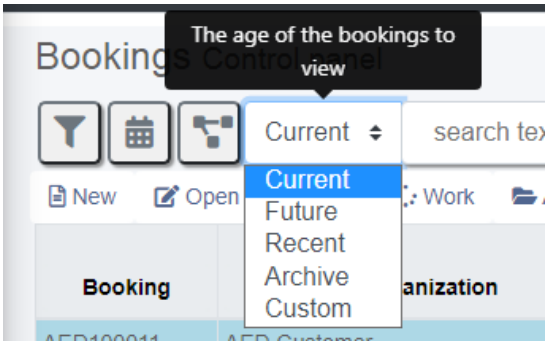
Grid scope is used to customize the range and type of bookings displayed on the grid. This is the window that you will see when you click on the Bookings Menu.

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.

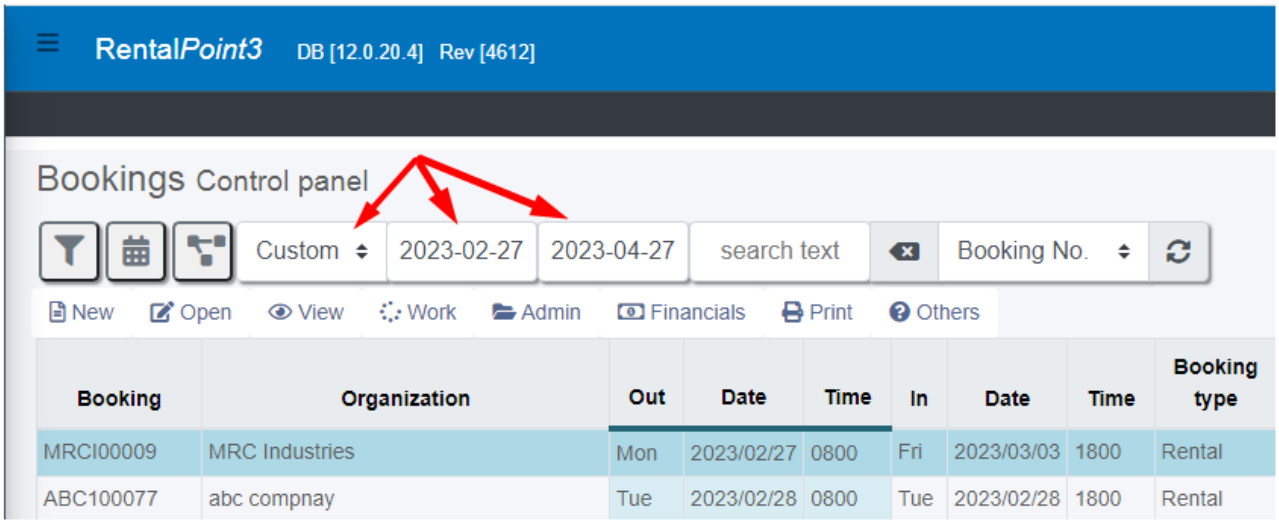


Based on the days to look back and forward settings above:

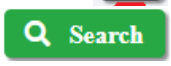
- The ***current*** window will show bookings for the past 20 days and 60 days forward
- 60+ days are considered ***future*** bookings, while bookings older than 20 days are considered 'recent'.
- ***Archive*** is bookings that are archived.
- ***Custom*** is subject to user entered date range (see below)



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



Use the  icon to to access filters, next ☑ to include or ☐ to omit bookings from the display, then

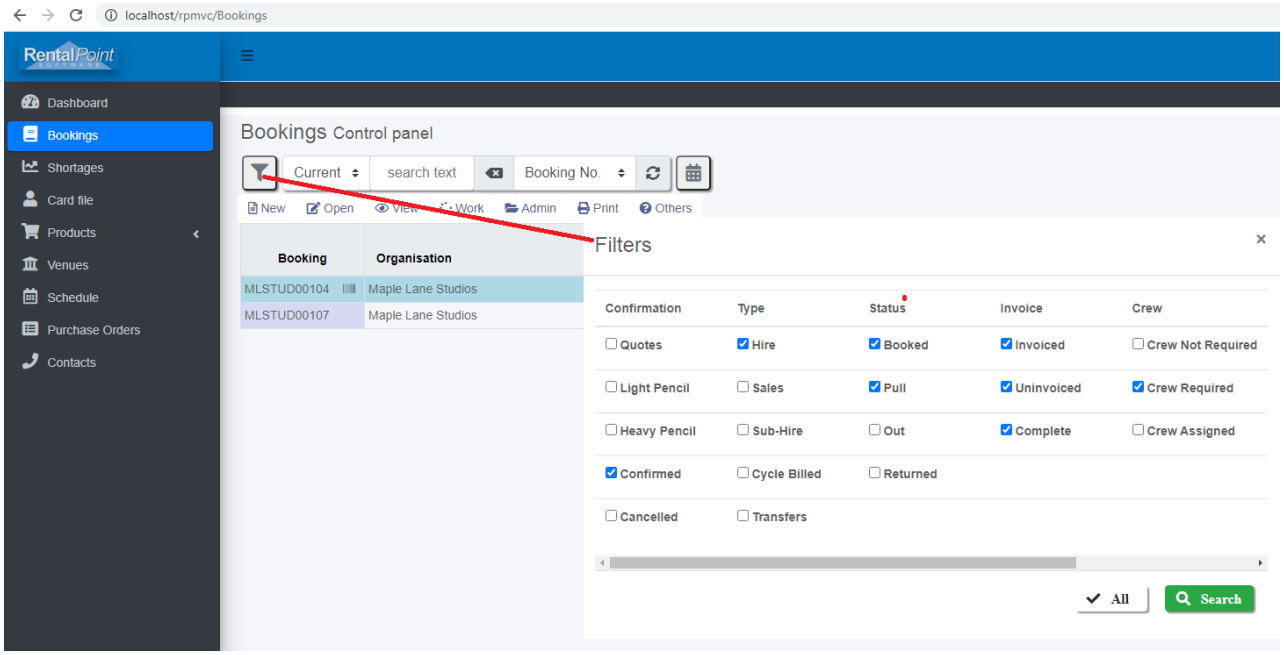


for bookings matching the current filters

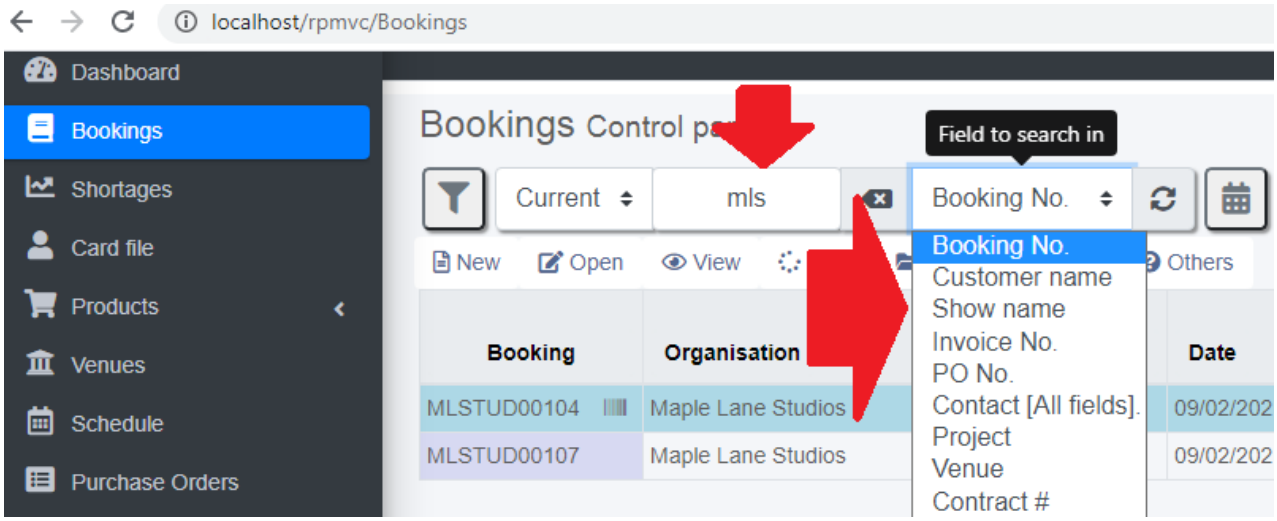


will re-check ALL filters

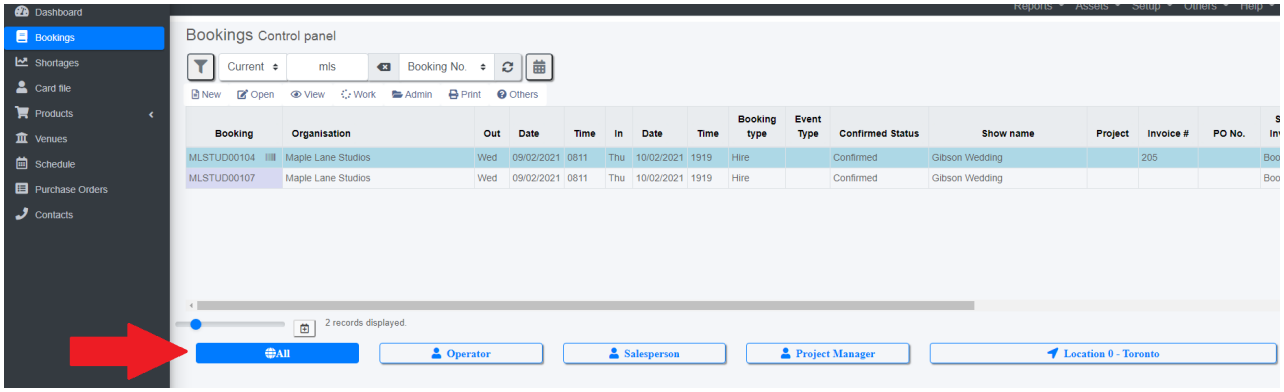
Example: The filters below will search for all confirmed rental booking with a status of booked or pulled that require crew assignments



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

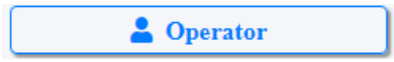


and booking scope relevant to current operator/salesperson/project manager/location/all

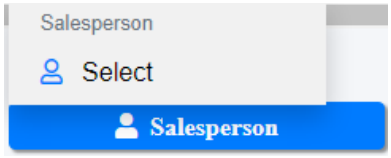




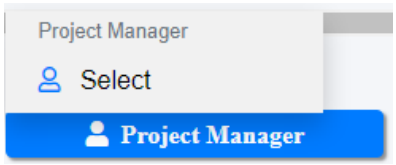
Bookings displayed are from ALL Operators, Sales Persons, Project Managers for the selected Location



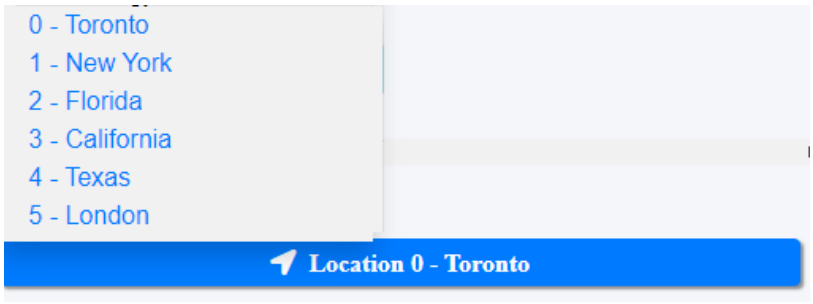
Search is narrowed to operator currently logged in



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



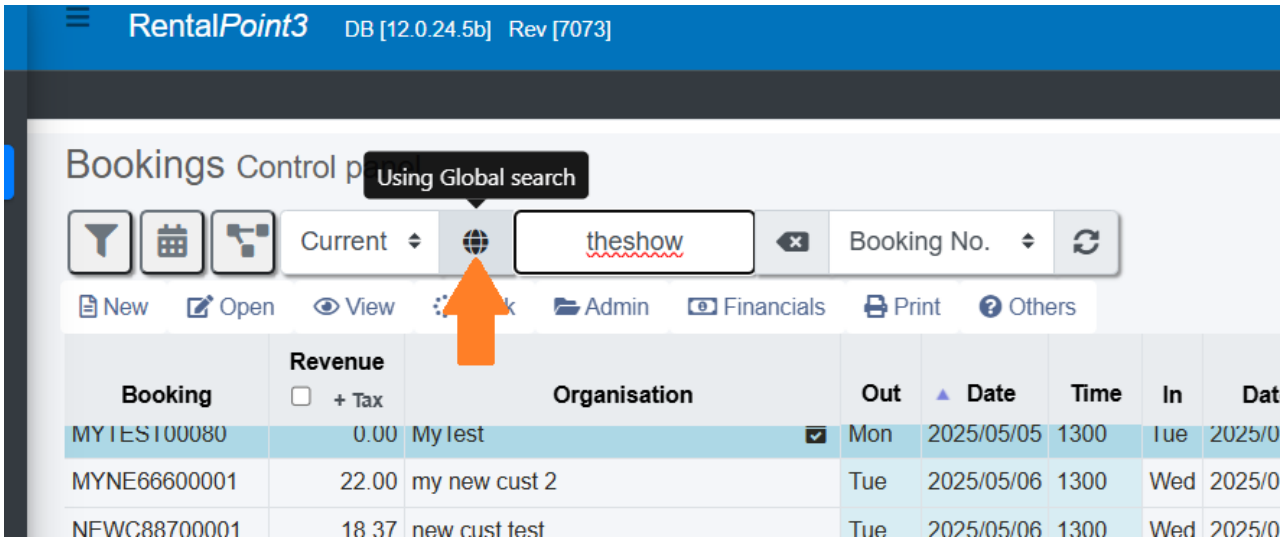
Search is narrowed by selected Project Manager and the bookings that Project Manager is assigned to



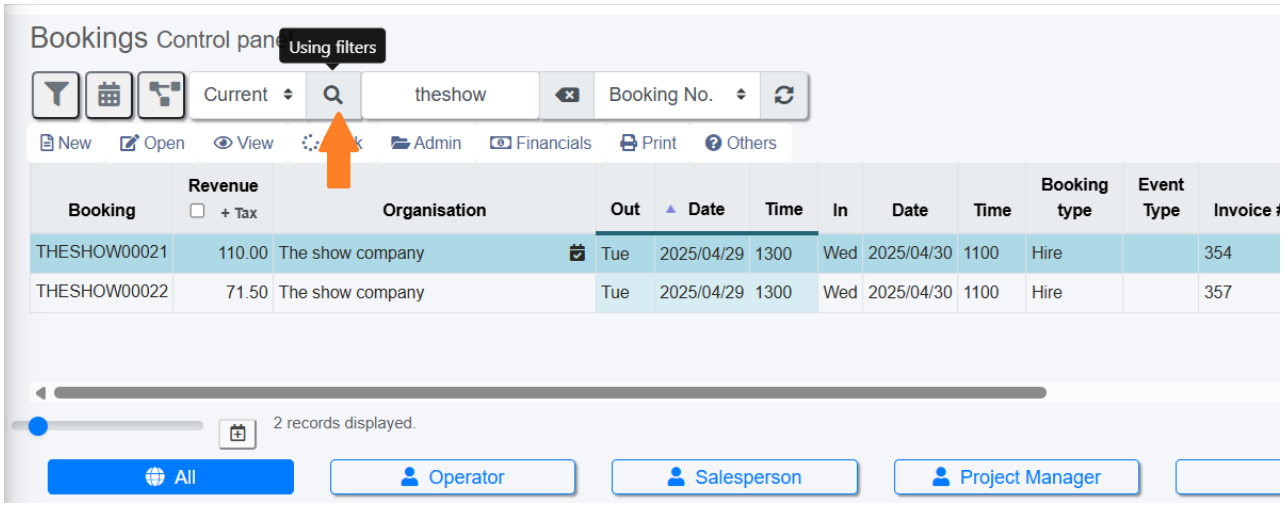
Search is narrowed by selected Location and the bookings that are assigned to that Location

Can't find a booking?

Use the Global Search tool. This option will ignore all filters when searching for the entered text

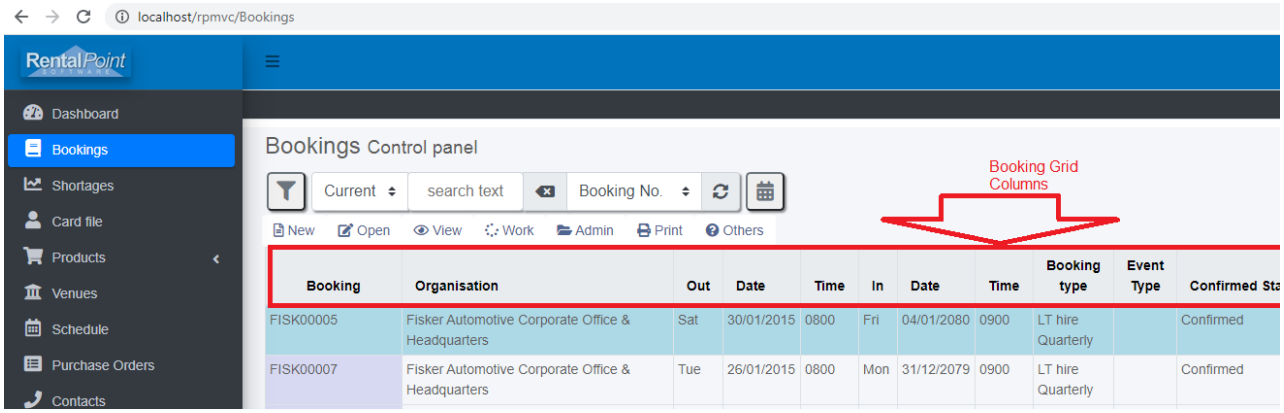


Toggle back to scoped search by clicking the icon again

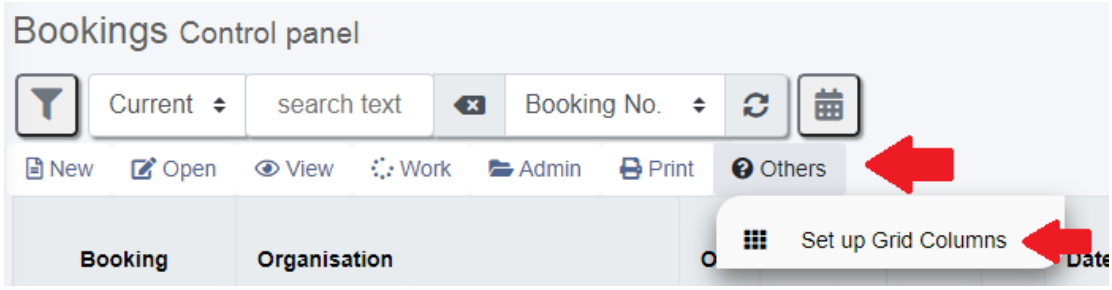


Column Order

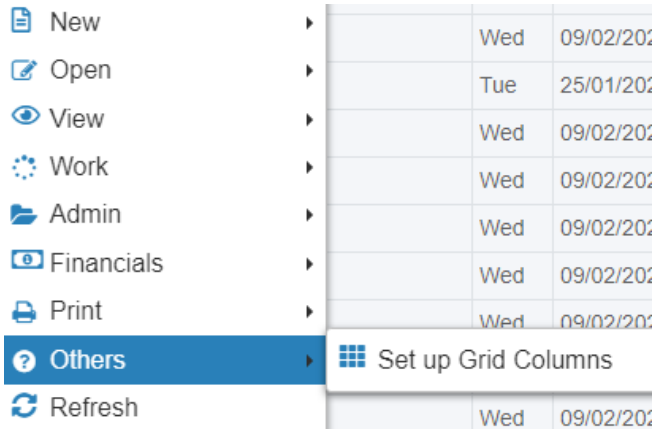
Booking Grid column headings are found at the top of the Booking Grid and are used to summarize the bookings displayed on the grid.



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

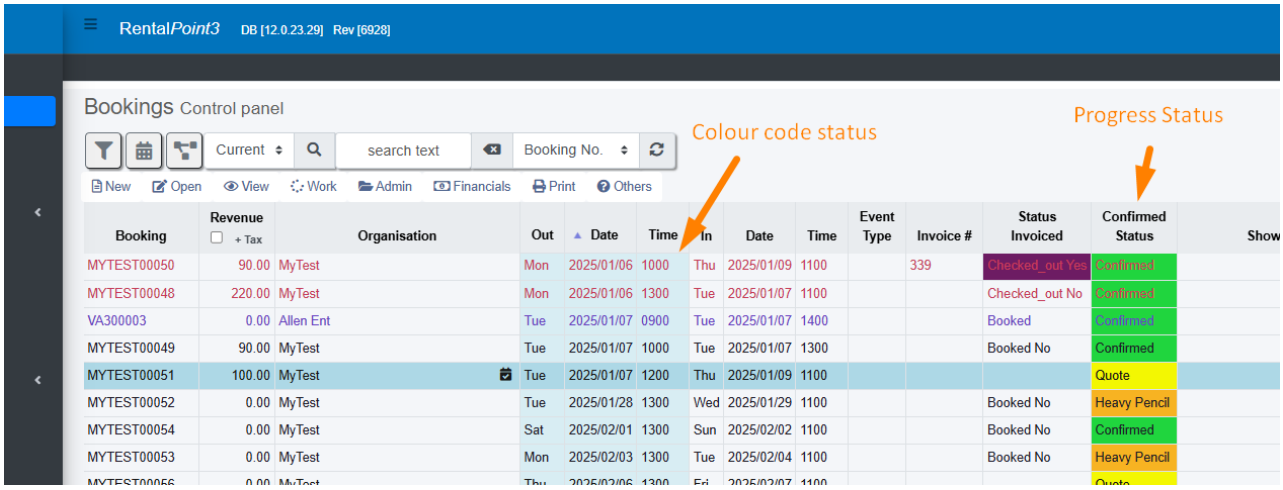


Move the grid columns using the keys, then click Save

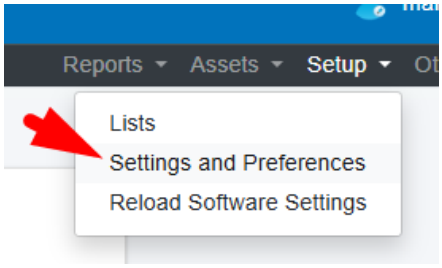


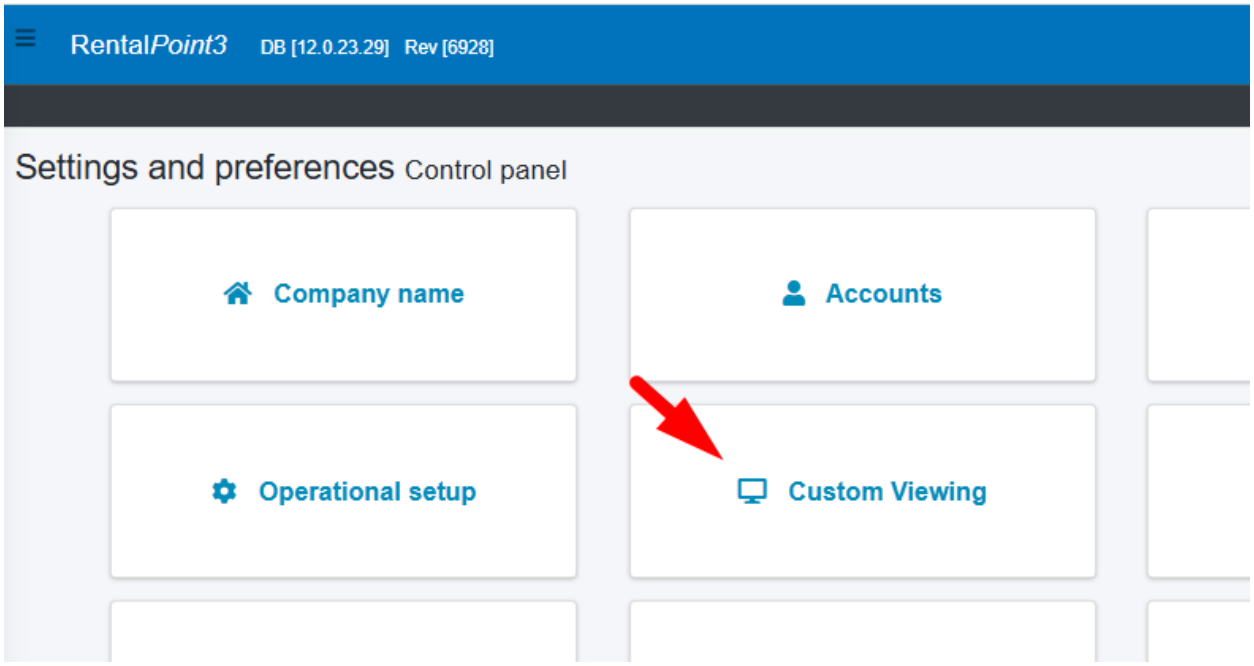
Colours

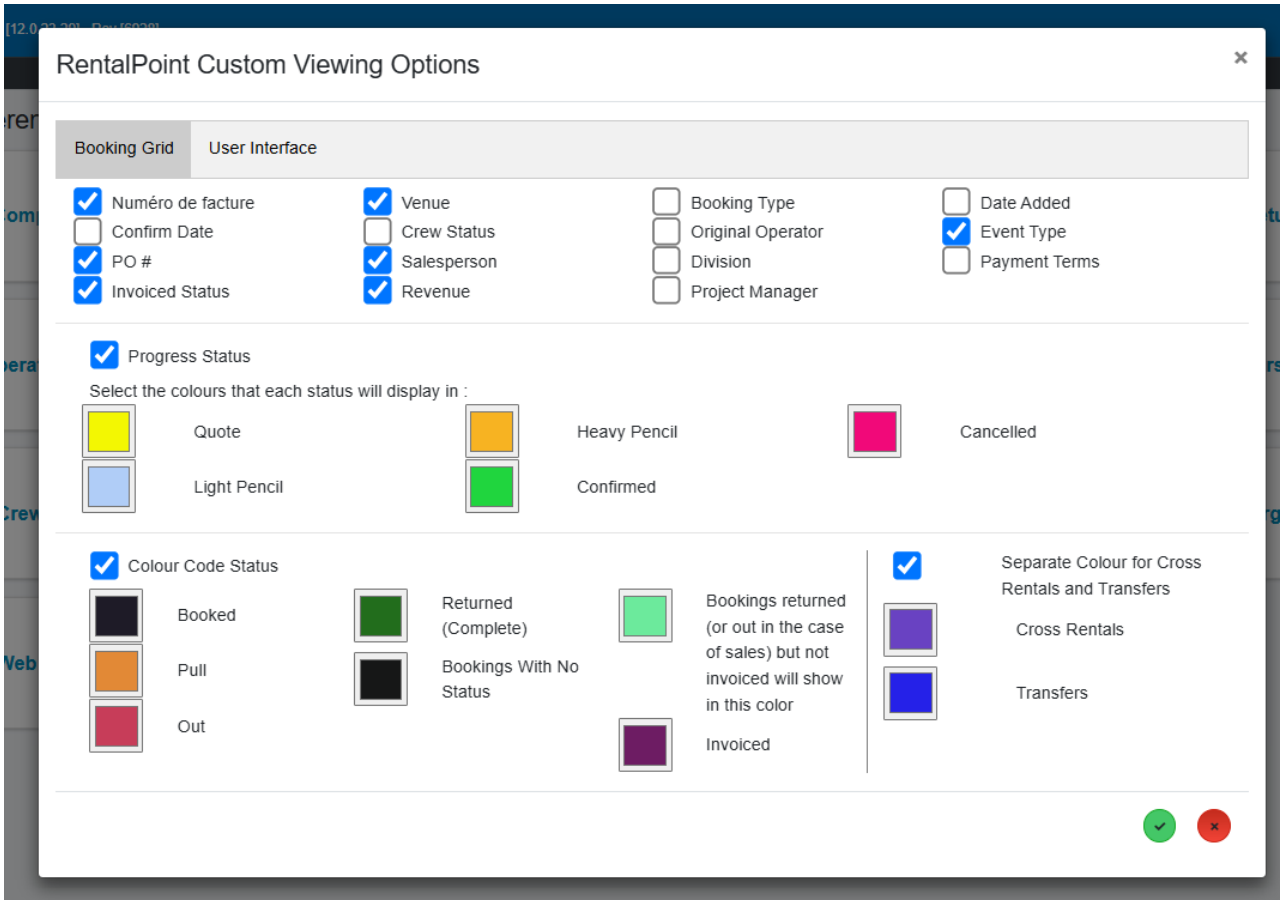
Colours can be customized for each line on the booking grid as defined by Colour Code Status and Booking Progress Status



Customize your Booking Grid colours per the option below


Reports
Assets
Setup
Lists
Settings and Preferences
Reload Software Settings

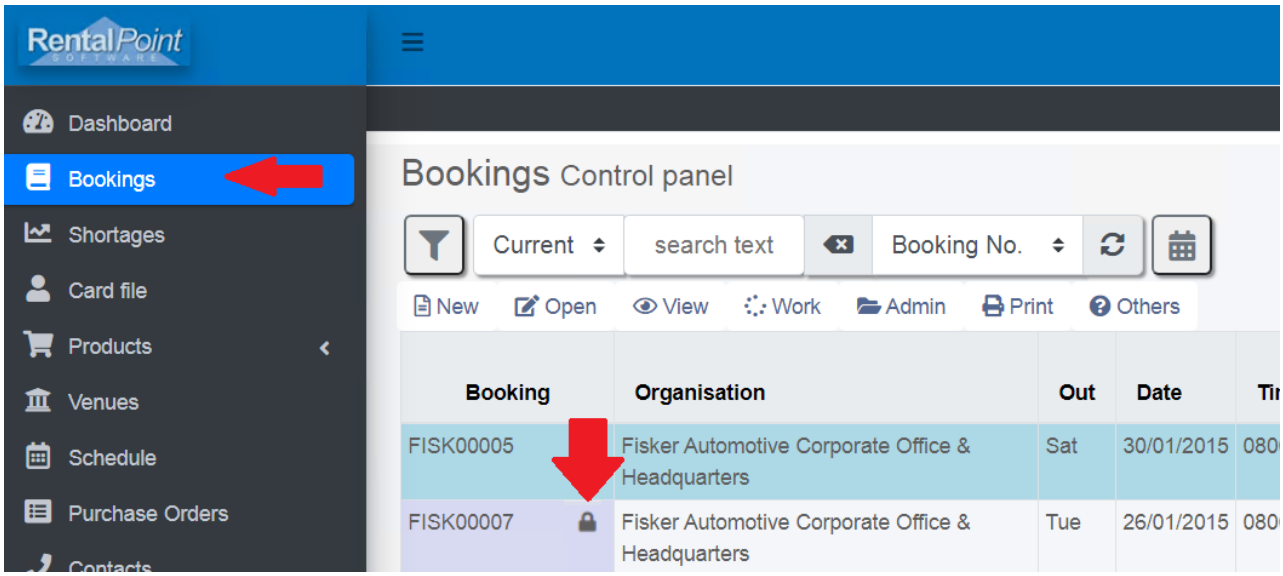

RentalPoint3
DB [12.0.23.29] Rev [6928]
Settings and preferences Control panel
Company name
Accounts
Operational setup
Custom Viewing



Bookings Locked for Editing

Bookings Locked for Editing

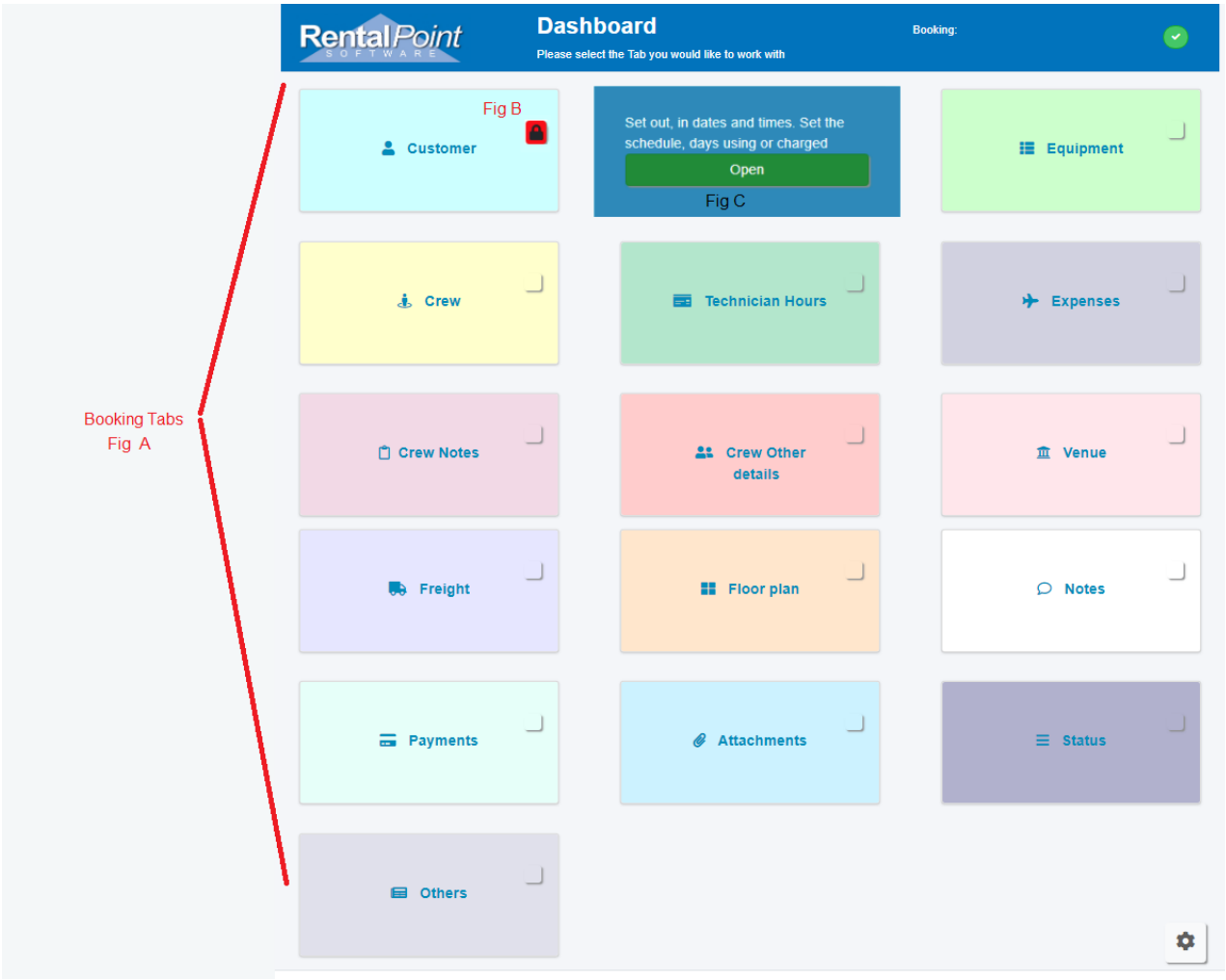
A Lock icon beside any booking on the Booking Grid identifies bookings that are currently being edited by other users.



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

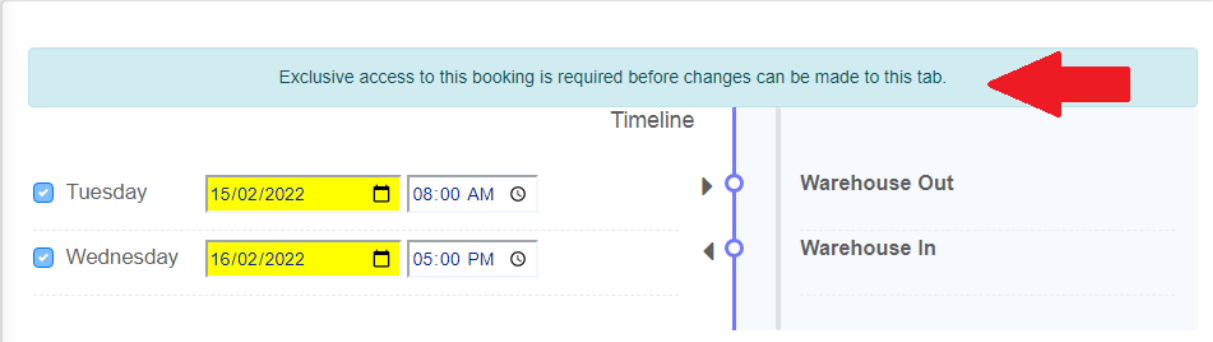
The first person to open a booking has **exclusive access** to that booking, with ability to update all fields. Other users may edit and update isolated sections of the booking with non-exclusive access as outlined below.

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.

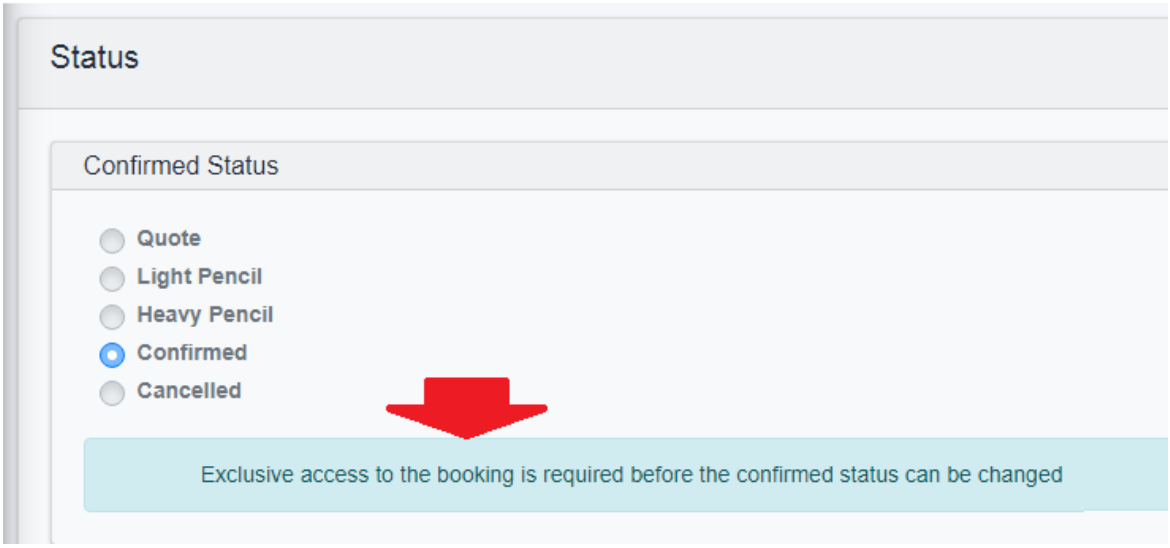
Exclusive Access is required for...

- 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).*



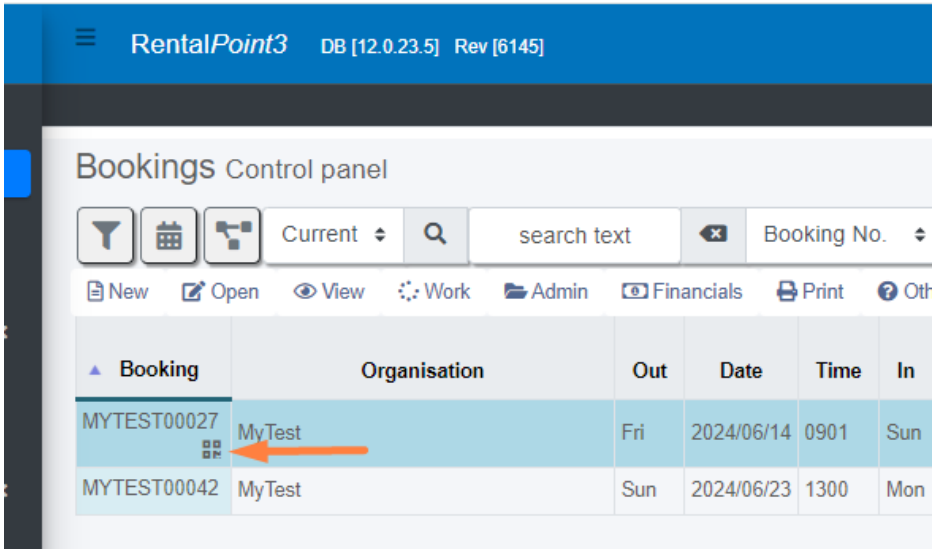
- Changing the status of the booking requires exclusive access since it affects equipment reservation and therefore equipment availability.



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



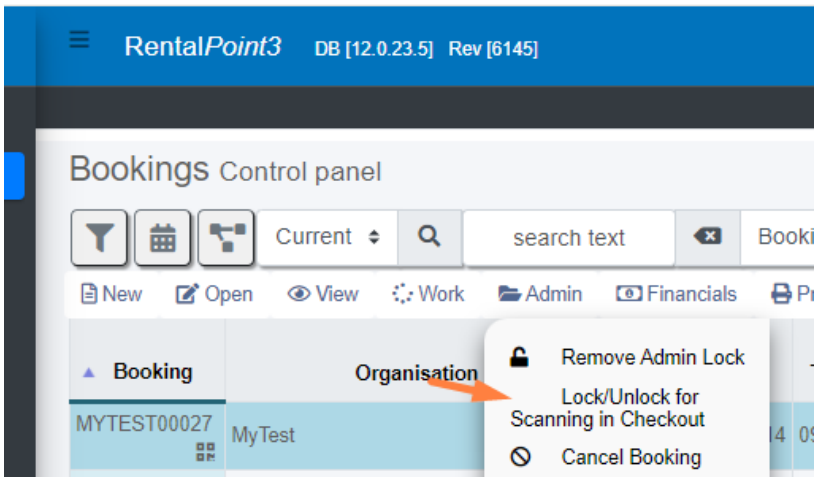
This functionality is generally used to affect a higher level of control over the warehouse checkout process, proving especially useful when cross rentals are checked out to a booking.

Sample scenario:

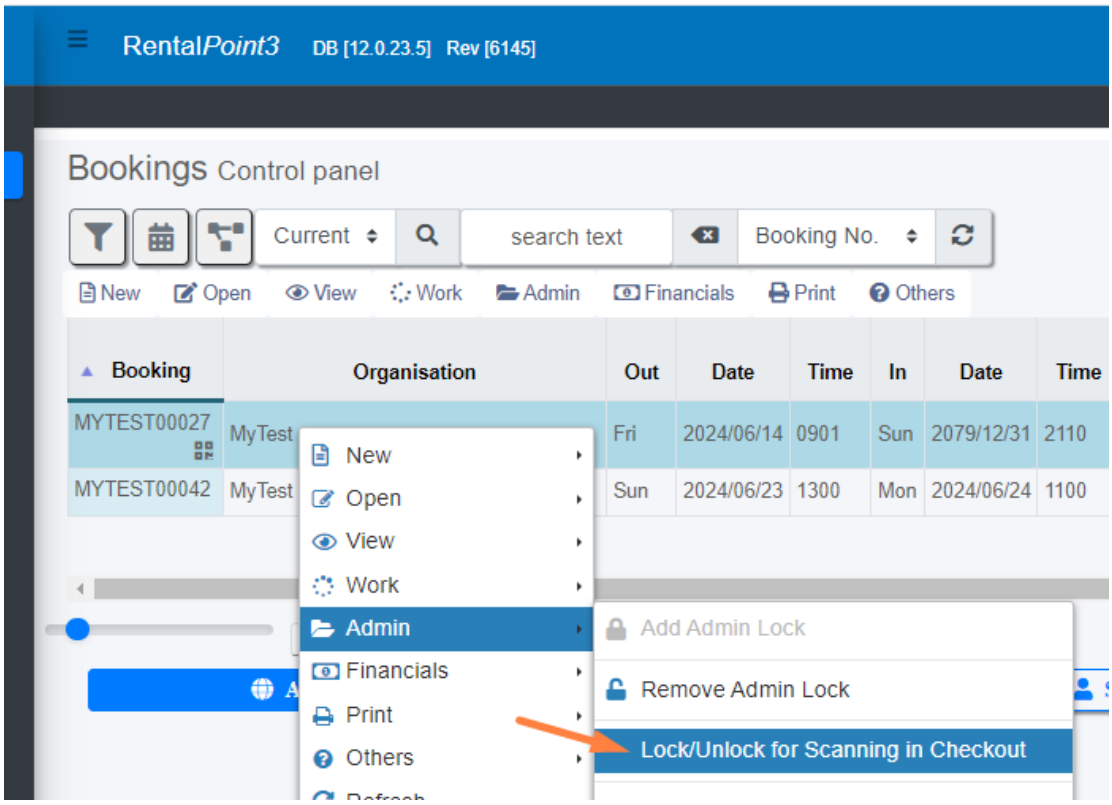
- *Cross rental gear for a booking arrives from the vendor with the vendors barcode attached for their tracking purposes.*
  - *Your warehouse staff check the gear out to the booking it is rented against incorrectly using the vendor barcode.*
  - *A problem arises if the vendor barcode happens to match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

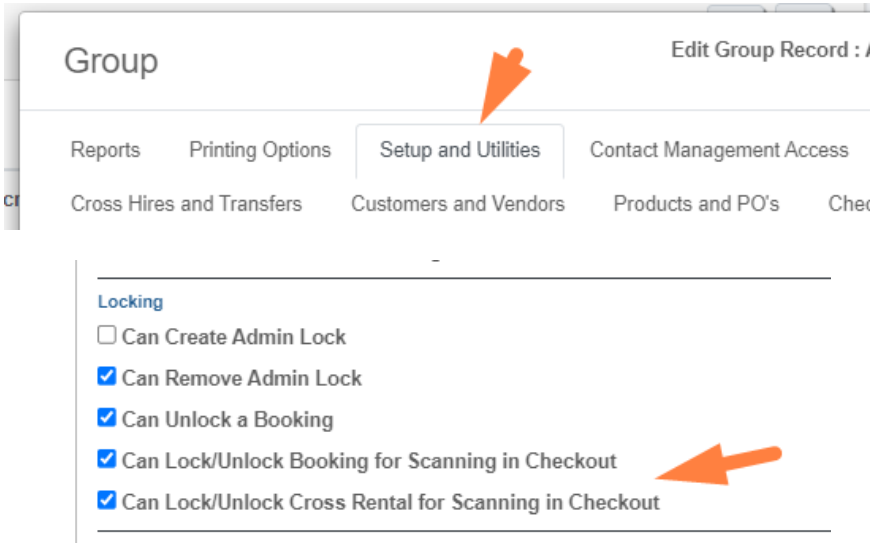


Also available from the right click menu



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.

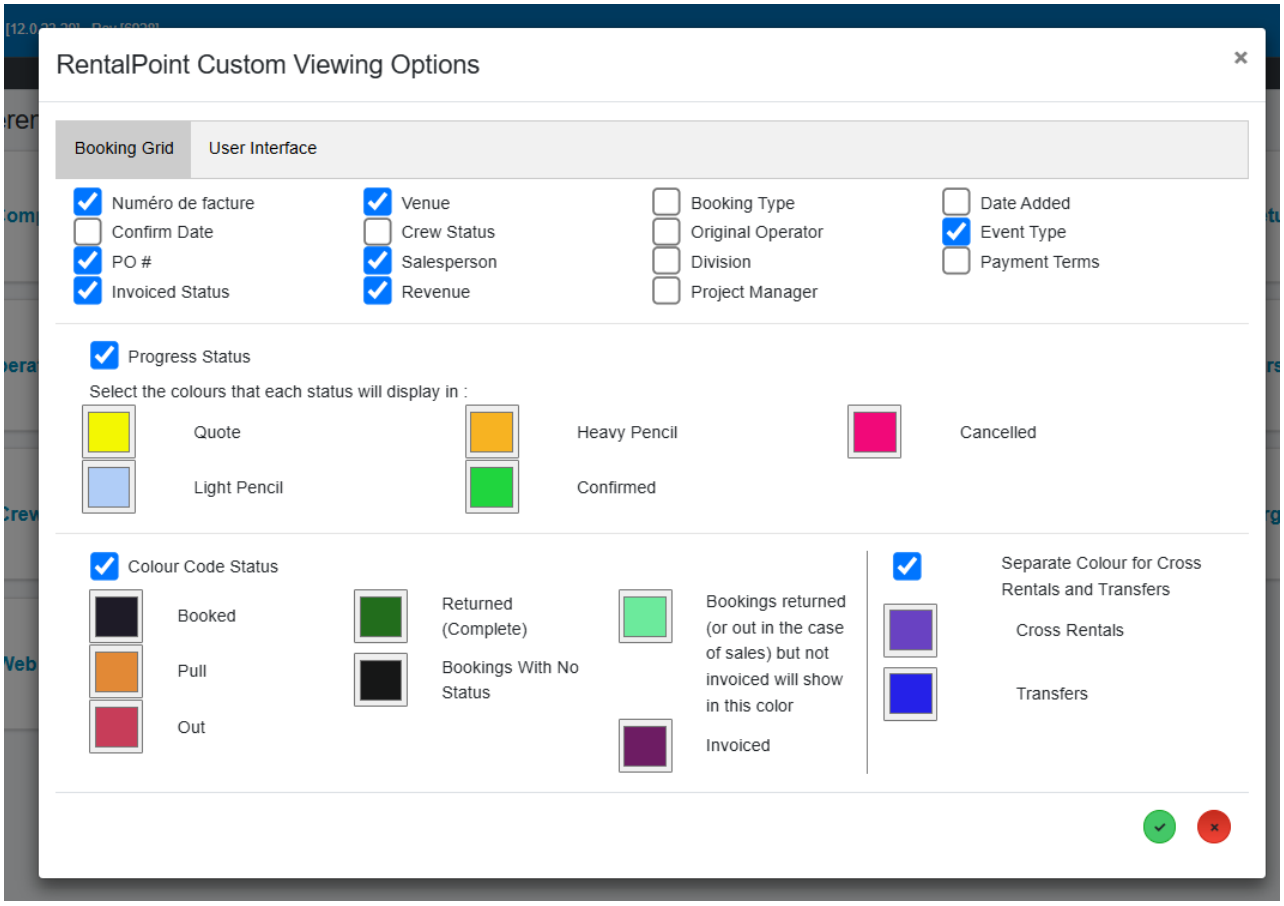
When a booking is locked for scanning, the ‘Enter Barcodes’ Tab will not appear as an option in the checkout window.

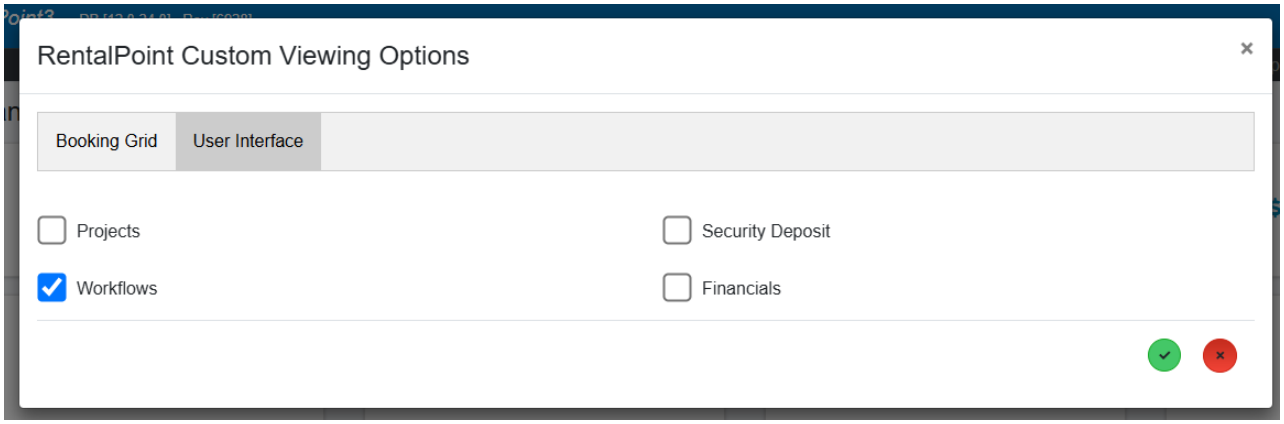
Include/Omit Columns

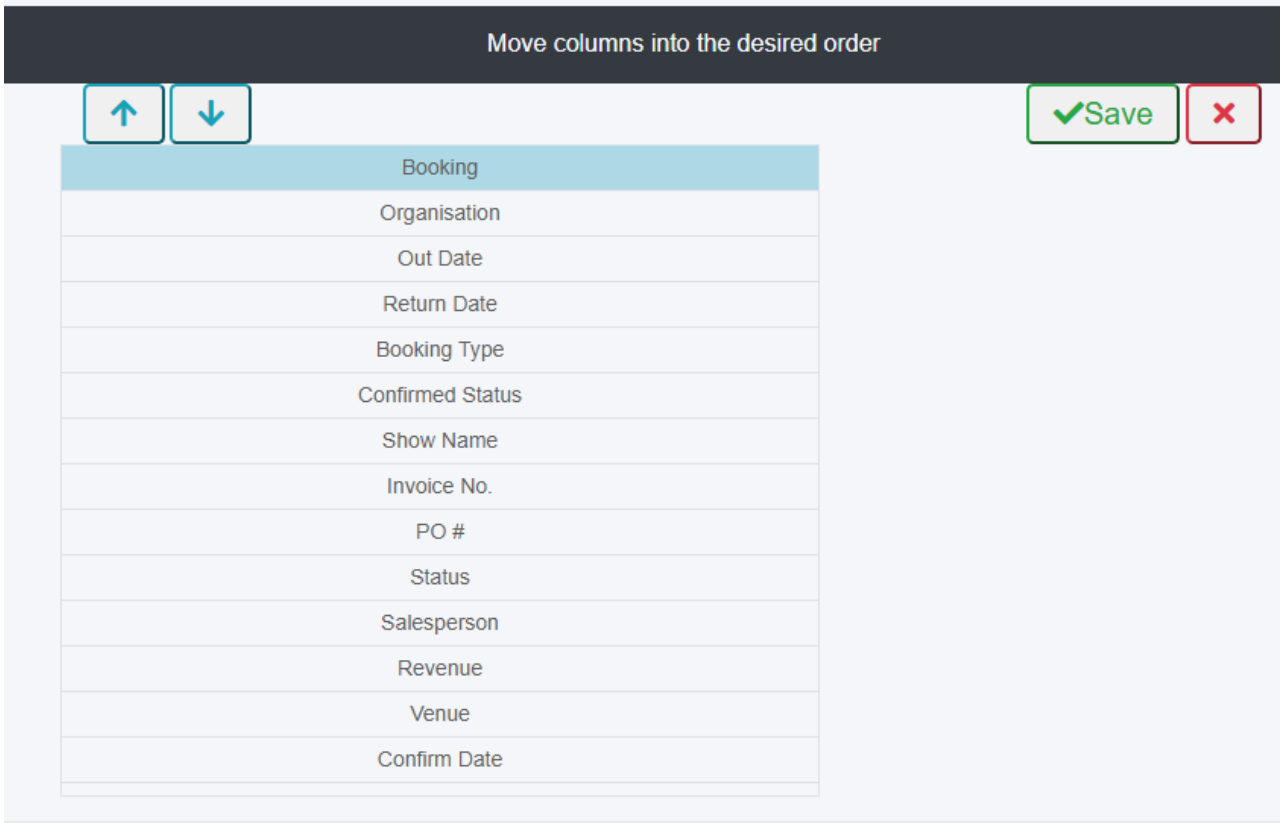
Rentalpoint offers the ability to hide some columns from the booking grid

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.



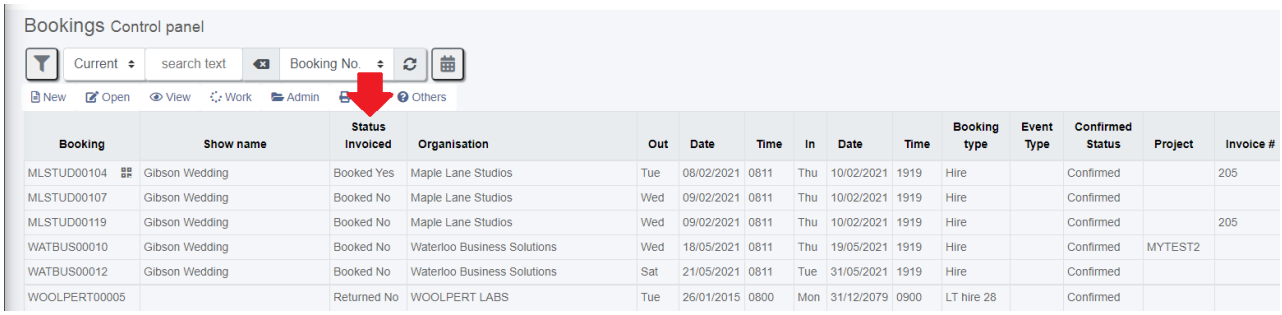




Status Column

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

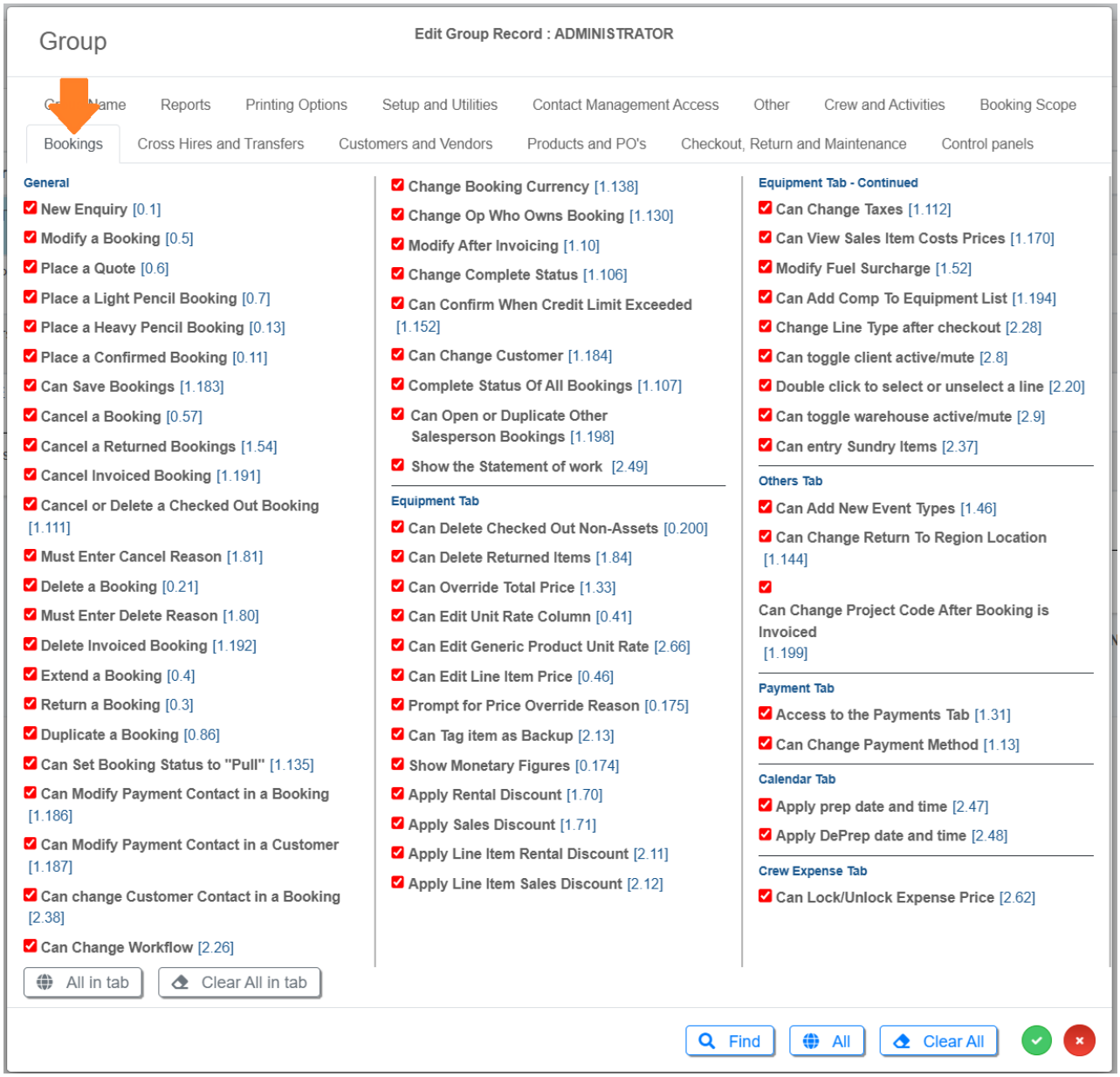


Booking	Show name	Status Invoiced	Organisation	Out	Date	Time	In	Date	Time	Booking type	Event Type	Confirmed Status	Project	Invoice #
MLSTUD00104	Gibson Wedding	Booked Yes	Maple Lane Studios	Tue	08/02/2021	0811	Thu	10/02/2021	1919	Hire		Confirmed		205
MLSTUD00107	Gibson Wedding	Booked No	Maple Lane Studios	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	31/12/2079	0900	LT hire 28		Confirmed		

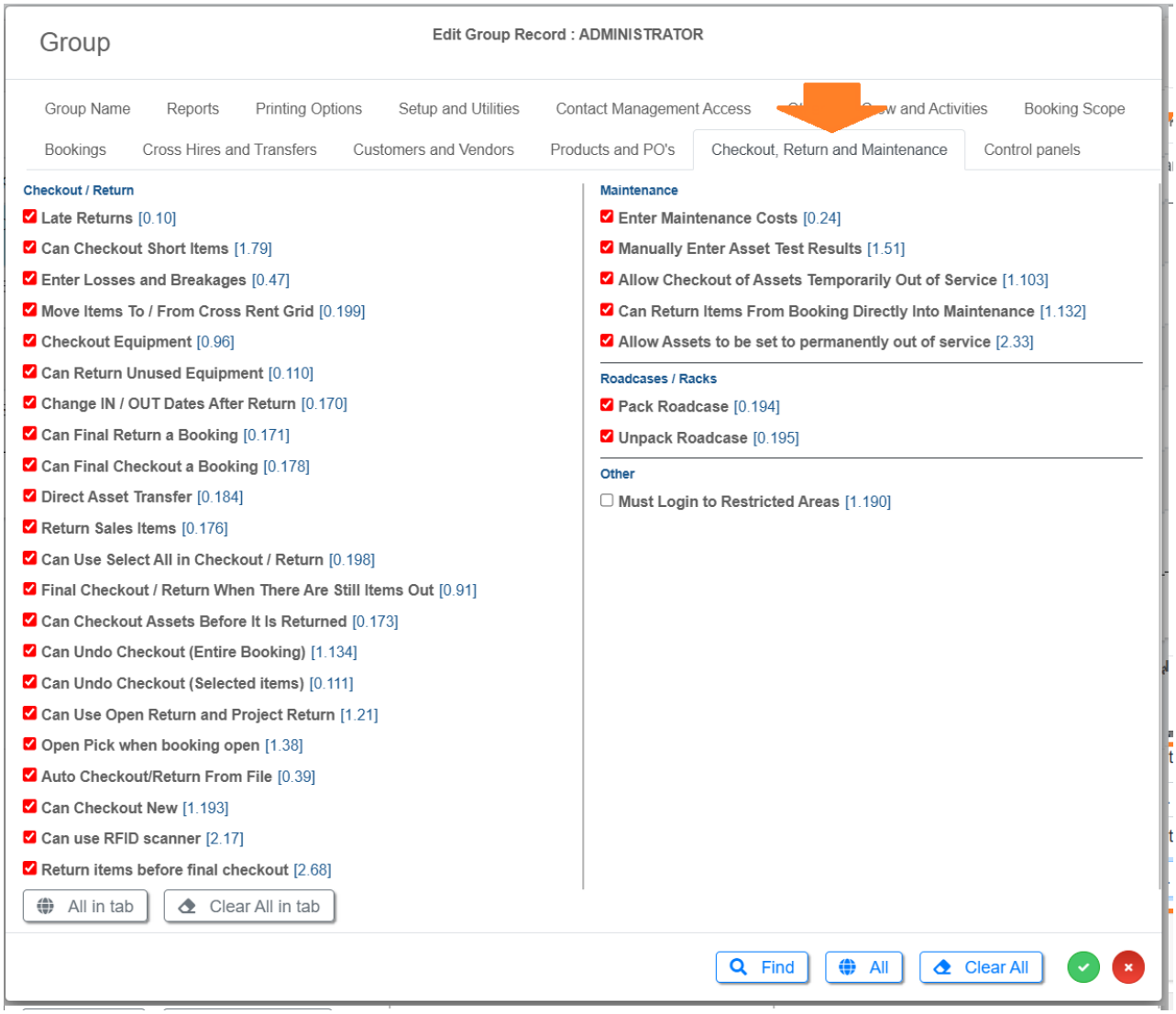
Operator Privileges

Access via Setup-->Lists->Operators-->Edit Operator Group

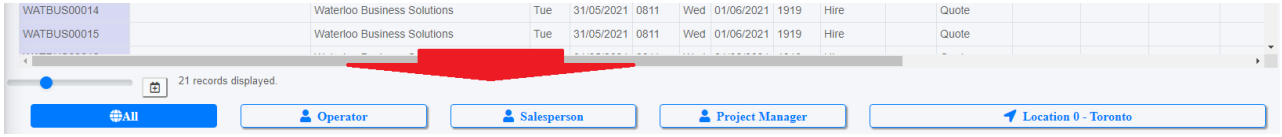
Limit user access to booking functionality via the Bookings Tab, uncheck any option you wish to block user access to.

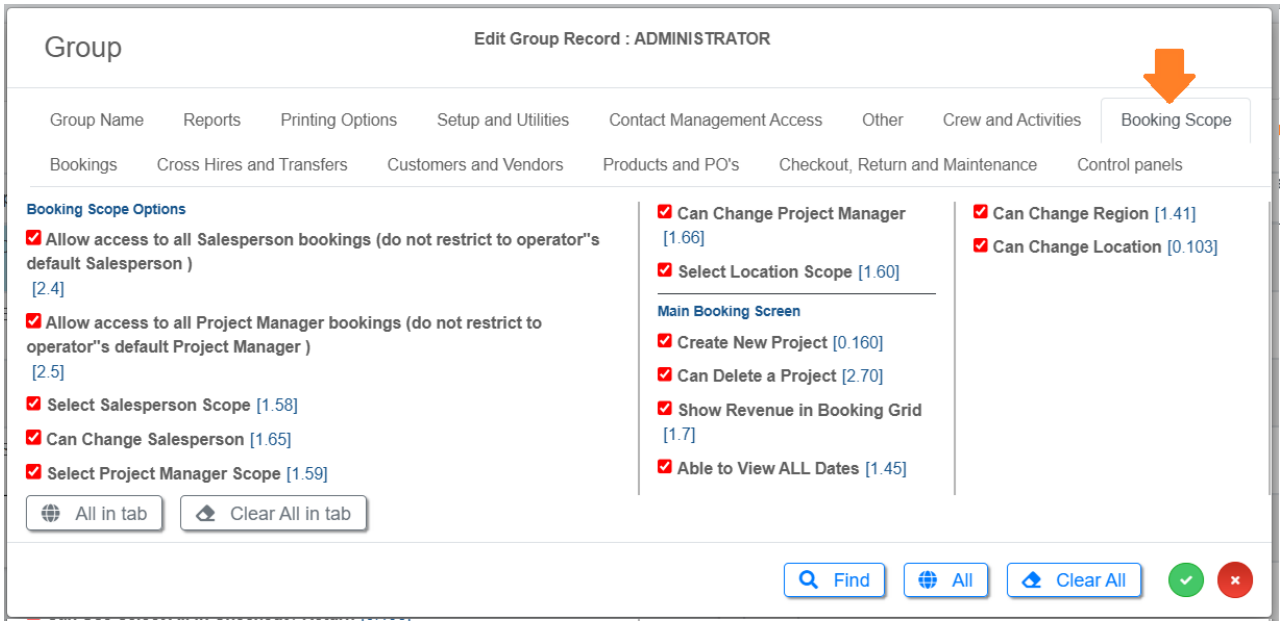


Limit user ability to checkout/return bookings via the 'Checkout/Return and Maintenance' tab



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





Parameters

Operational Parameter #3 'Booking Grid Primary Scope'