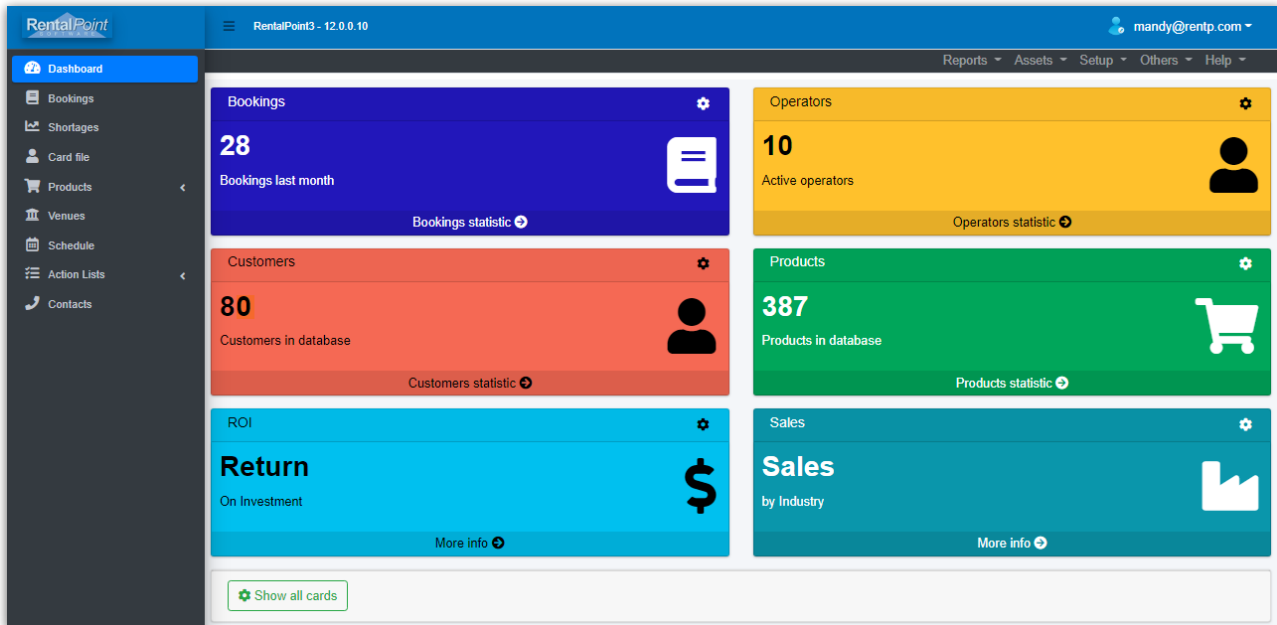


The RentalPoint Dashboard

Last Modified on 25/04/2023 3:03 pm EDT



Permissions

Set dashboard permissions under the 'Others' tab in Operator Setup.

The screenshot shows the 'Edit Group Record : ADMINISTRATOR' page in the RentalPoint system. The 'Other' tab is selected, indicated by a red arrow. The page displays a list of permissions for the 'ADMINISTRATOR' group, organized into several categories:

- Availability:** View Shortage List, View Running Balance, View Plot Sheet, Manage Reservations.
- Other:** Late Pickups, Lay Days and Rostered Days Off, Show Credit Card Number, Allow Access To Salesperson Field In Booking and Customer, Enable Web Catalog Options, Can Change Reviewed Status, Access 'POs to be Reviewed' Report, Can View 'Followup' Tab, Can Edit Virtual Carnet.
- Contacts:** Add / Edit Contacts, View Contacts Only, Delete Contacts, View Other Operator's Contacts.
- Custom Templates:** Add Template, Open Template, Remove Template, Modify Custom Template.
- Attachments:** Can Open Quotes / Custom / Invoices / Purchase Orders / Cross Rentals, Can Open Booking Hardcopy / Packing Lists / Collection Dockets / Return Receipts, Can Open Documents in Others Folder.
- Dashboard:** Bookings, Customers, Operators, Products, Return on Investment, Sales by Industry. A red arrow points to this section.
- Venues:** Add Venues, Edit Venues, Delete Venues.
- Truck Schedule:** Can Access Truck Schedule, Can Use 'Add To Truck' Button, Can Use 'Remove' Button.
- Delivery and Return Schedule:** Can Use Delivery and Return Schedule, Can Use Truck Assignment.
- Master Billing:** Add / Edit Master Bill Commissions, Deactivate Master Bill Commissions, Access Master Billing Report, Invoice Master billing Venue.
- Labor duplication options:** Assignments, Keep Assigned Technicians, Technician Hours, Other Crew Information.

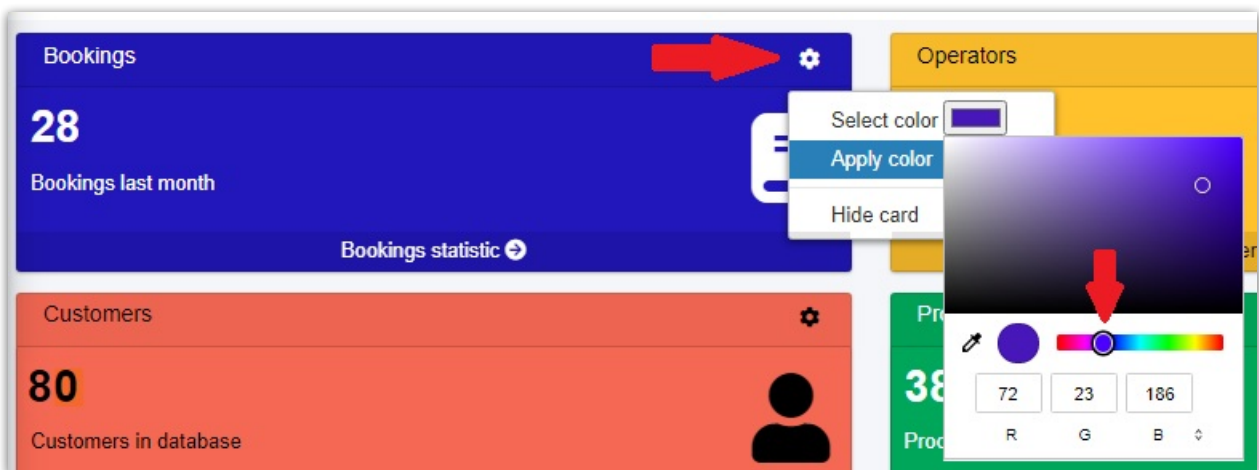
At the bottom of the page, there are buttons for 'All in tab', 'Clear All in tab', 'All', 'Clear All', and a confirmation dialog with 'x' and '✓' buttons.

Customize

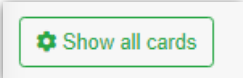
Individual Card Settings

Click the Gear Icon on the top right of any card to customize the card color or hide an individual card.

- Click 'Hide Card' to hide the card from the dashboard.
- To change color, click 'Select color', then move the dial or enter the color code, next click 'Apply Color' to submit your changes

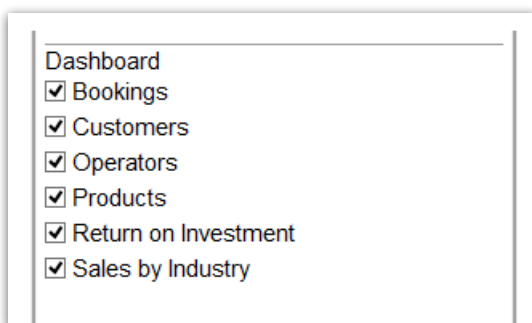


Reset View

Click  at the bottom left of the dashboard to rest all cards for viewing.

Operator Privileges

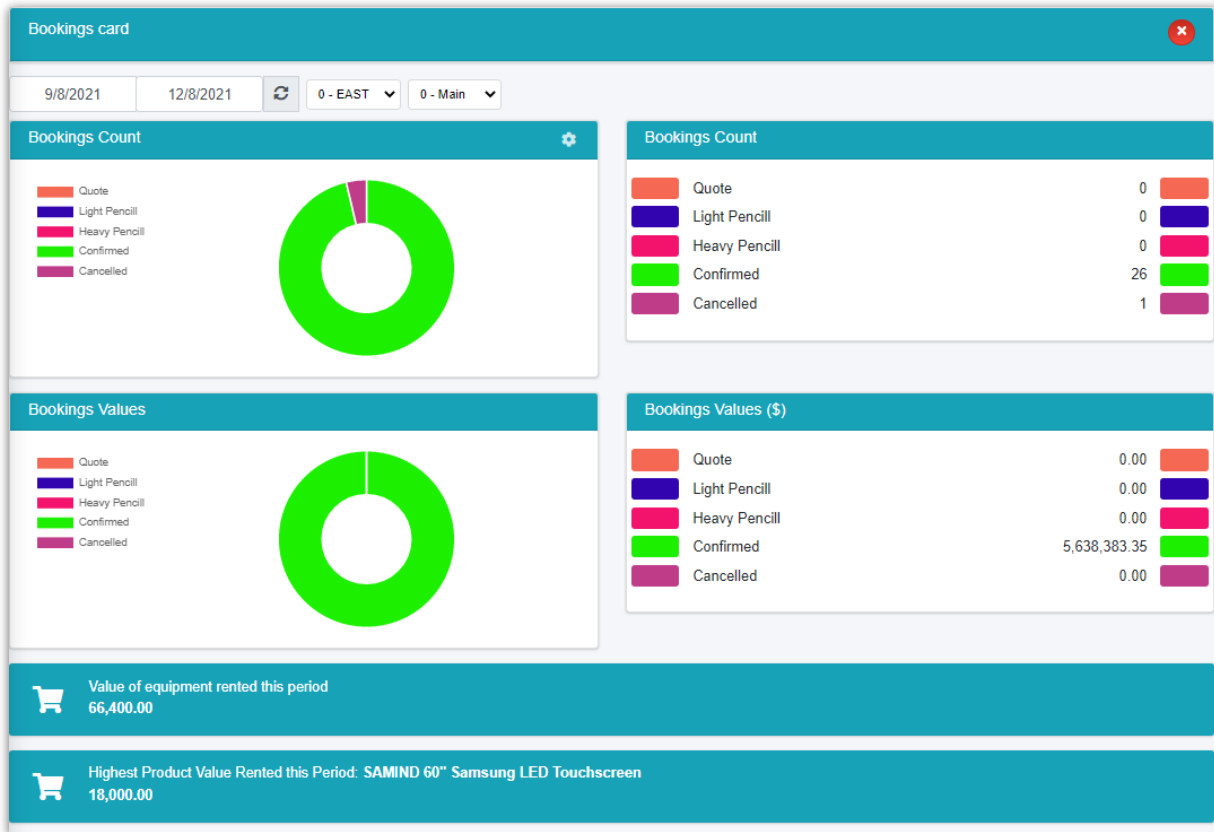
The following operator privileges allow administrators to hide cards for some user groups. Accessible via Setup-->Operators, edit an operator group and look for the Dashboard privileges on the Others tab.



Bookings

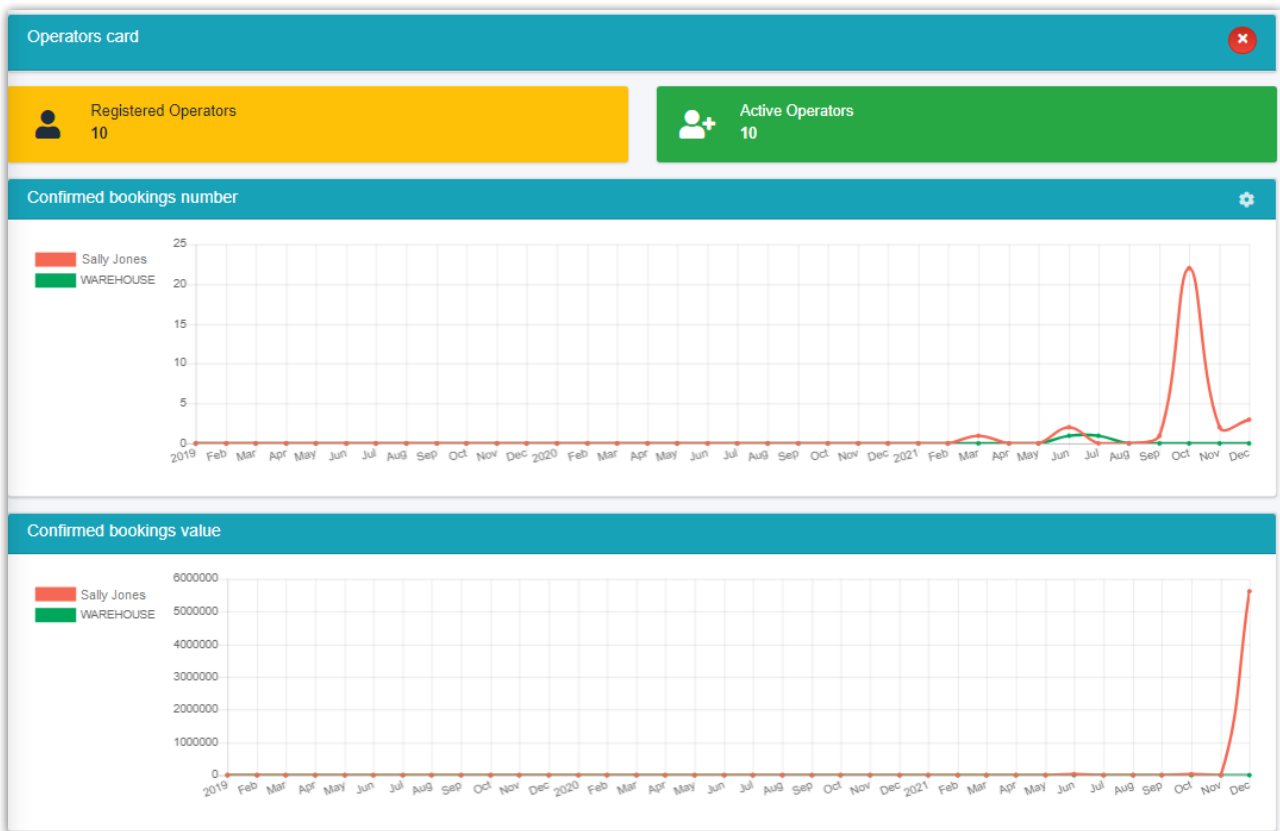
See booking statistics breakdown by booking value, booking status and value of equipment rented.

- Click the Gear Icon on the top right of any card to customize the card color
- Change the date range (*region and location subject to license*)



Operators

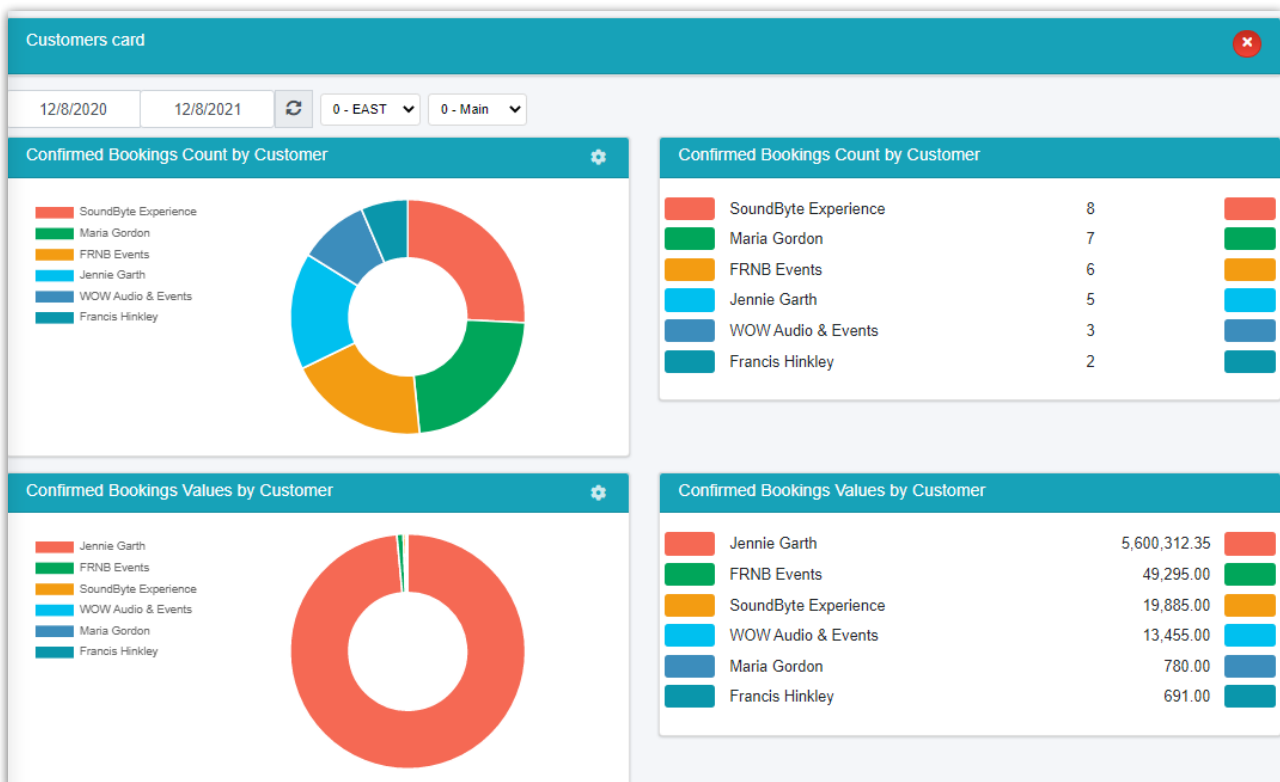
Review operator activity against confirmed bookings over 24 months



Customers

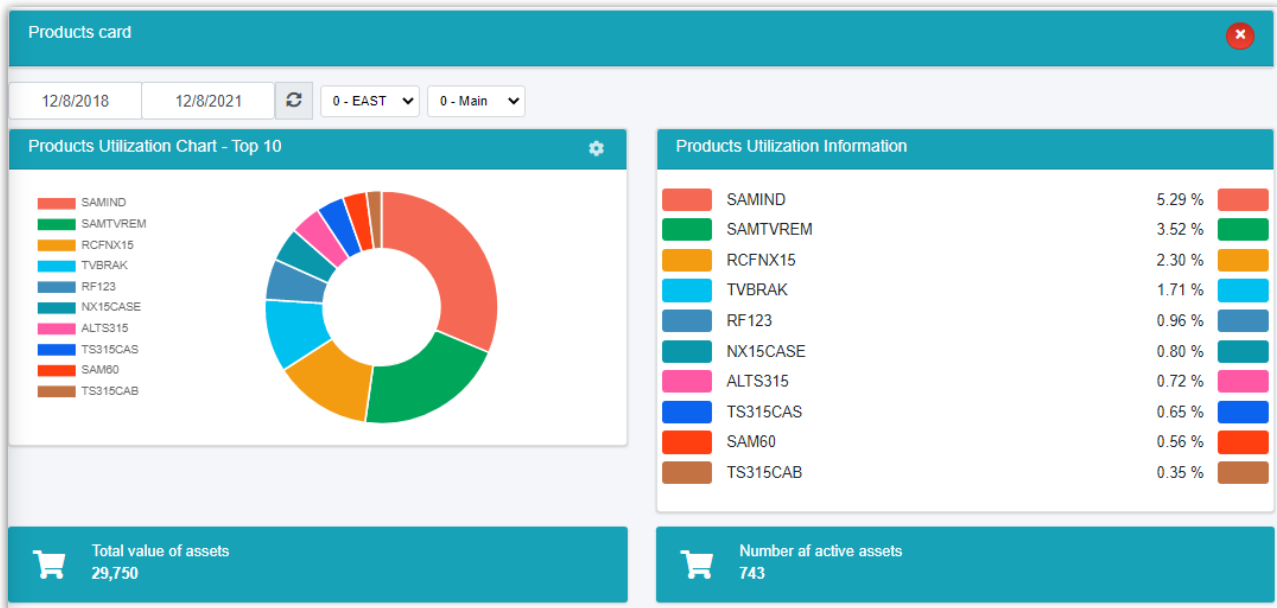
Review customer statistics based on confirmed bookings count and value by customer

- Click the Gear Icon on the top right of any card to customize the card color
- Change the date range, region and/or location (*region and location subject to license*)



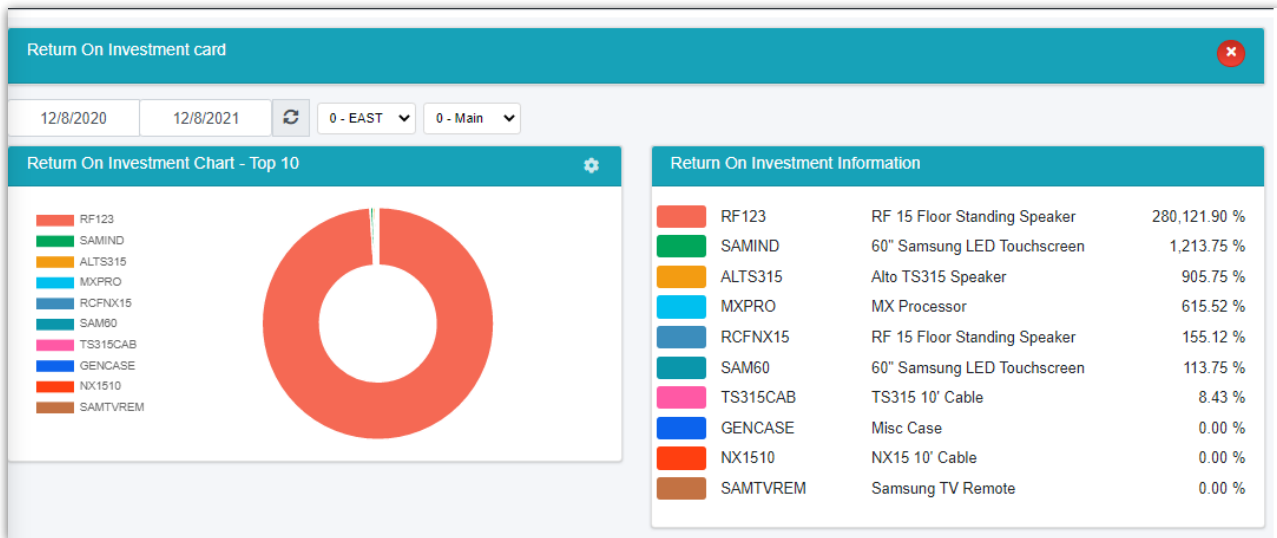
Products

Review top product utilization for date range (region and location subject to license)



ROI

Review Return on Investment for top 10 products rented (region and location subject to license)



Sales

Review top 10 product sales by industry for date range (region and location subject to license)

Sales by industry card



12/8/2020

12/8/2021



0 - EAST

0 - Main

Sales by Industry Chart - Top 10



AUDIO
PROD



Sales by Industry - Top 10

AUDIO	19,060.00	% 61.79	
PROD	11,785.00	% 38.21	