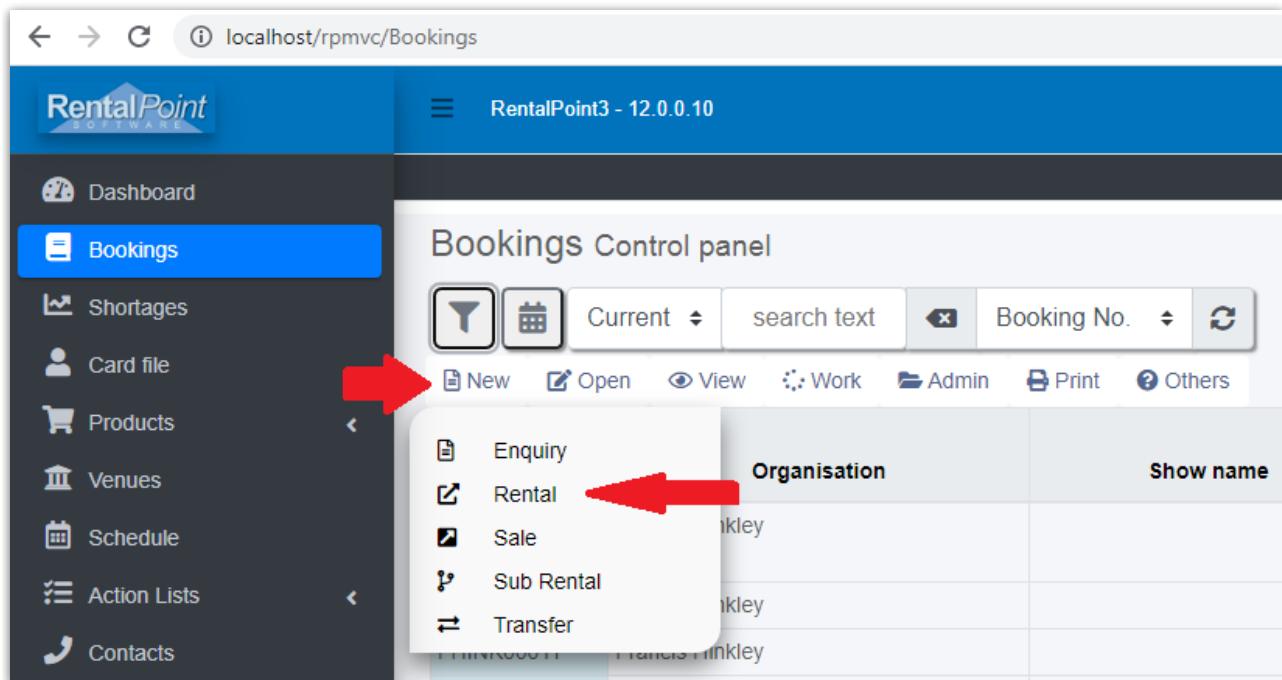


# Enter New Booking

Last Modified on 27/11/2025 10:38 am EST

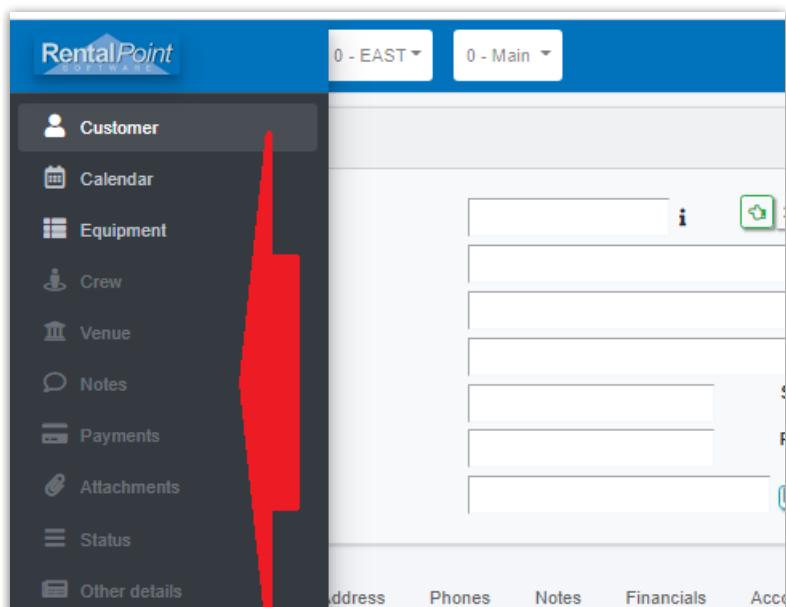
From the Booking Grid, click  , then choose then relevant booking type

Fig 1.0



The screenshot shows the 'Bookings Control panel' in the RentalPoint3 software. The left sidebar has a 'Bookings' tab selected. The top navigation bar includes a 'New' button, which is highlighted with a red arrow. A dropdown menu opens from the 'New' button, showing options: Enquiry, Rental, Sale, Sub Rental, and Transfer. The 'Rental' option is also highlighted with a red arrow. The main area displays a table with columns for 'Organisation' and 'Show name'.

A customer booking is a compilation of information relevant to the job, stored under different tabs/sections, so that any one section can easily be edited without locking up the entire booking. When entering a new booking, Customer, Calendar and Equipment details are entered before other sections become available for access. Section headings can be found to the left of the form you are currently working on. Click on any section to access corresponding information. Each tab/section is explained below....



The screenshot shows a detailed form for a booking. The left sidebar lists sections: Customer, Calendar, Equipment, Crew, Venue, Notes, Payments, Attachments, Status, and Other details. The main area contains several input fields and tabs at the bottom labeled: Address, Phones, Notes, Financials, and Acco.

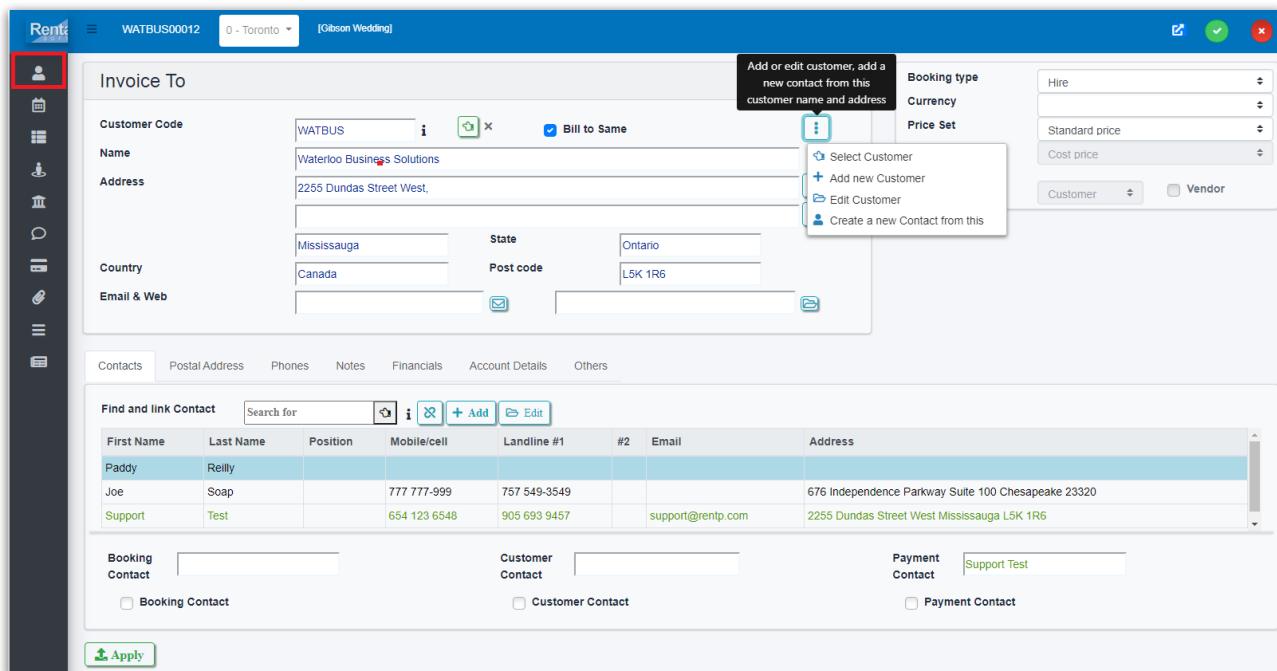
# Table of Contents

- Customer Details
- Calendar
- Equipment Grid(<https://rentalpoint3.knowledgeowl.com/help/equipment-tab>)
- Labor
- Venue
- Notes
- Payments
- Attachments
- Status
- Other Details

## Customer Details

Enter details on who the booking is for by typing the customer name. The system will auto fill the rest of the information relating to the existing customer. Add new/edit existing customers/contacts via the  icon to the right of the customer code

Fig 1.1



## Booking types

- **Rental Booking** has primarily Rental Inventory on it however it can also have consumable items. RentalPoint will expect any rental items to be returned.
- **Sale Booking** is for selling consumable or rental items. These will remain in Out status and will not be expected to be returned in the software.
- **Cycle Billed** (also known as Long Term) is for books that will be out for an extended period of time (perhaps undetermined) and regular invoicing needs to take place. Intervals are for 7, 14, 28, Monthly, Quarterly.

- **Sub Rentals/Cross Rentals** will show up in the equipment grid. These bookings are "tied" to a main booking for the purposes of resolving shortages. These bookings will appear on the Delivery and Return Schedule at the appropriate dates.
- **Transfers** are only available with the multi location module. If this module is enabled transfers between locations is available for shortage resolution.

#### **Bill To**

The Booking can be entered for one customer but billed to another when invoicing. Click the 'Same' checkbox to stay with the same customer.

#### **Contacts**

Information for each contact associated with the customer record. Here you can select booking, customer and payment contacts for the booking. The relevant contact information will be used on client documentation. Add new contacts via the  icon to the right of the customer code (fig 1.1 above)

#### **Rental Price Set Customer Pays**

Price sets are determined during implementation and available for selection within the booking. The price set is used to price equipment added to the booking.

#### **Sales Price Customer Pays**

Prices sets are determined during implementation and available for selection within the booking. The sales price determined here is used to price sales equipment added to the booking. Sales prices can be changed in the product record.

#### **Rental Discount Rate**

Is displayed on the customer tab of the booking but has already been set up in the customer record. You'll have an opportunity to apply a once off rental discount on the equipment tab of the booking. However, if you want a rental discount permanently associated with the booking, then set this up on the financials tab of the customer record.

#### **Customer Contact**

By setting the 'Can change Customer Contact in a Booking' operator privilege, the user can now change the customer contact from within the booking. If the user changes the customer contact, the customer record will be updated and all bookings referenced to that customer will reflect to the new customer contact.

#### **Financials and other details**

Other customer information is visible behind a tabbed index at the bottom of the customer page. Some customer information can be modified from these tabs within the booking.

Customer Code: WOWAUD Bill to Same

Name: WOW Audio & Events

Address: 88776 Westmorland Street

Country: Paris State: Ontario

Country: Canada Postal Code: L5L 3K5

Email & Web: info@wowaudevents.com www.wowaudevents.com

**Financials** (selected tab)

**Contacts** **Postal Address** **Phones** **Notes** **Financials** **Account Details** **Others**

**Insurance**: None

**Account Manager**: (empty)

**Tax Details**

- Tax Exempt
- Exempt No.: (empty)
- Tax Authority #1: HST
- Tax Authority #2: Exempt

**Credit Status**

- Credit Limit
- Account type
- Allow Stop
- Payment Method

## Calendar

Important dates affecting the booking are applied in the Calendar Tab. While many dates can be set, RentalPoint allows for user selection of dates relevant to each booking.

For Warehouse Out and IN Dates only, uncheck  **Schedule Enabled**

Timeline

Thursday 21/05/2021 08:11 Warehouse Out

Friday 22/05/2021 19:19 Warehouse In

**Settings**

Schedule Enabled

Notes:  Hide  Show Small  Show Large

OR for a wider date selection, check  **Schedule Enabled** and populate the dates relevant to your booking

The screenshot shows the RentalPoint software interface. On the left is a sidebar with various icons. The main area has a 'Timeline' view with a vertical timeline line. To the left of the timeline is a list of events with checkboxes and date/time fields. To the right of the timeline is a list of notes. A red box highlights the 'All' checkbox at the top of the event list. A red arrow points from the 'Schedule Enabled' checkbox in the 'Settings' panel to the notes section of the timeline.

**Timeline**

- All (2)
- Monday 01/01/1980 09:00
- Thursday 21/05/2021 08:11
- Friday 22/05/2021 19:19
- Monday 01/01/1980 00:00

**Preparation**  
Gear needs to be available by this date/time in order to be prep'd for the booking

**Warehouse Out**  
Gear must be available to leave the warehouse

**Load**

**Delivery**

**Set up by**

**Rehearsal**

**Show starts**

**Show finishes**

**Strike/deRig**

**Pickup for return**

**Unload and check**

**Warehouse In**  
Gear will be considered as available for other jobs unless a de-prep date/time is set

**De-Prep**  
Gear will be ready for use on other jobs by this date & time

**Settings**

- Schedule Enabled (1)
- Hide
- Show Small (3)
- Show Large
- Show All (4)
- Hide unchecked

**Days**

Using 1 (5)

Days Charged 1

**Apply**

### 1. Schedule Enabled:

- Schedule Enabled** makes all dates in the RentalPoint booking timeline available to the user. Each date to be used, should then be checked individually.
- Schedule Enabled** limits the booking calendar to warehouse out and in dates which are the minimum dates required for a booking.
- The visibility of the schedule enabled checkbox and timeline dates are controlled by operational parameter 78
- Operational Parameter 88 controls use of Prep and De-prep dates: These dates are used to take the gear out of availability before the booking warehouse out date and after the booking return date, to allow time for prep and de-prep of the gear before it is available for another show.

### 2. Use **All** to check/uncheck all dates in the timeline.

- Notes allow the user to define each timeline date in more detail. The notes option can be hidden/displayed small/displayed large by using the available radio buttons next to each option.
- Display of dates in the timeline can be limited to those populated by the user via the 'Hide unchecked'/'Show All' radio buttons
- Days Using and Days Charged can be used independent of each other and are controlled by parameters.

Calendar tab notes are stored in TblBookNote with the following note types

## Booking Notes Table

### tblBooknote

Field Name	Field Type	Size	Description
ID	decimal	9	Primary Key ( Auto increment number)
booking_no	varchar	13	Foreign key to tblBookings.booking_no.
line_no	tinyint	1	Line number
text_line	varchar	253	Line of notes text
NoteType	tinyint	1	Note type {0-booking,1-invoice,2-labour,3-statement of work}

Description	NoteType Value
Preparation	4
Warehouse Out	5
Load	6
Delivery	7
Set up by	8
Rehearsal	9
Show starts	10
Show finishes	11
Strike/deRig	12
Pickup for return	13
Unload and check	14
Warehouse in	15
De-Prep	16

## Equipment Grid

Add inventory to your booking via the **Equipment Grid of the Booking**

Code	Description	Quantity	Avail	Short	Unit Rate	Days	%Disc	Price	Status
MSR100	8" Powered Speaker - Yamaha MSR1001	1	50	0	5	1	0	5	Single
MSR100	8" Powered Speaker - Yamaha MSR1001	1	49	0	5	1	0	5	Single
CASE1	Road Case 1	1	See	List	0	1	0	0	Package
PRX715	15" Two-Way Full-Range Main System/Floor Monitor	1	0	1	130	1	0	130	Single
PRX712	12" Two-Way Full-Range Main System/Floor Monitor	1	0	1	100	1	0	100	Single
EON615	15" Two-Way Multipurpose Self-Powered - JBL	1	0	1	55	1	0	55	Single

## Labor

Labour can be added to a booking via either a standard price (option 1 below)

or by entering previously established labor products (option 2 below)

### Option 1: Add Crew Standard Price

Manually add a flat rate crew cost under the equipment grid of a booking in the 'Crew' field (see screenshot below)

If you later add crew products under the crew tab of a booking, then the crew tab pricing takes precedence and will be charged to the client in place of the percentage price.

The screenshot shows a software interface for managing equipment bookings. At the top, there's a header with 'WOWAUD00019', '0 - EAST', '0 - Main', and various system status indicators. Below this is a toolbar with icons for search, view, change, arrange, and lists. The main area displays a grid of equipment items with columns for Code, Description, Quantity, Avail, Short, Sub Rental, Unit Rate, Days, %Disc, Price, Status, C, and W. One item in the grid is highlighted in yellow. Below the grid is a 'Pricing Summary' window. It includes fields for Total Rental (2.370), Del/Pickup (0), and Crew (474, with a red arrow pointing to it). It also shows sub-total (2.644), Exempt (0), and Total Price (2.644). The bottom right of the software window has a small icon with a person and a gear.

Alternatively, to simply add crew costs based on the rental price of a booking, set Pricing Parameter #68 to the percentage to be used in the calculation.

The screenshot shows the 'RentalPoint Version 11 Parameter Setup' window. On the left, there's a vertical menu with buttons for 'Contract Name' (with a red arrow pointing to it), 'Pricing Setup' (with a red arrow pointing to it), and 'Web and Email'. The main area is titled 'Select Pricing Parameter' and lists several parameters. The '68. Crew / Installation Based on Percentage' parameter is highlighted with a blue box and a red arrow pointing to it. Other listed parameters include '64. Default Number of Days to Charge', '66. Cycle Bill Weekends', '67. Deposit Based on Percentage of Cost Price', and '69. Default Discount Percentage for Backup Equip'.

That's it! RentalPoint will automatically add the calculated price (rental Price \* labour percentage) to each booking in the crew field on the equipment grid of the booking.

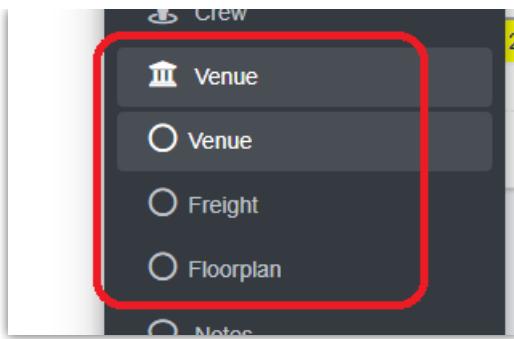
## Option 2: Add Crew Products



Both [Crew Parameters](#) and [Labor Products](#) must be set up before proceeding to [Add Labour/Crew to a Booking](#).

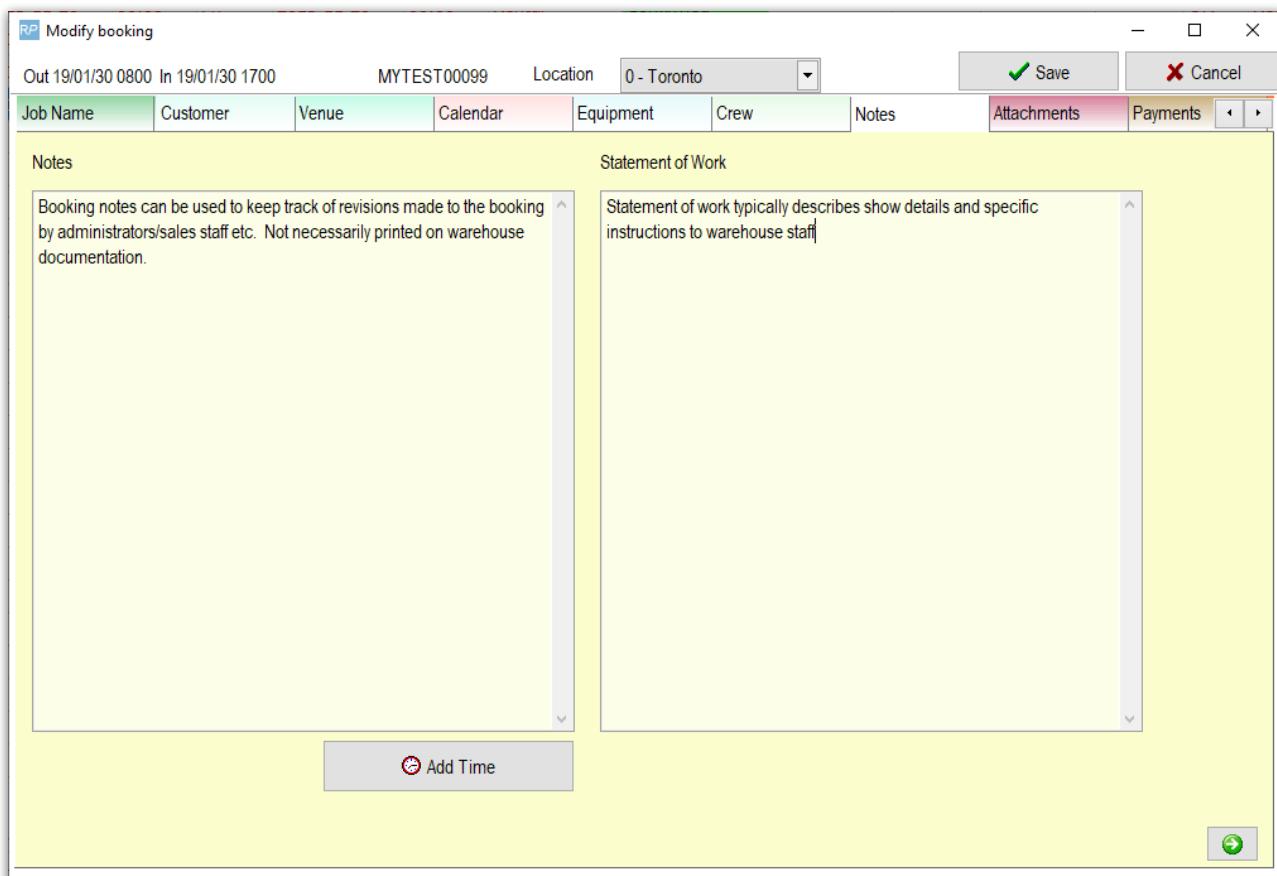
## Venue

The venue tab displays where the event is being held/where the equipment is delivered to, how the order is being picked up/delivered and any additional floorplan information. [Venue information is separated under three sub menu headings](#)



## Notes

The notes tab accepts 'Statement of Work' separate to 'Booking Notes' so that they can be printed separately on output documentation



### Booking Notes:

- Booking notes can be used to keep track of revisions made to the booking by administrators/sales staff etc. not necessarily printed on warehouse documentation.
  - The insert field used to include notes on RTF documentation is &BKNOTESC&
  - Booking notes are generally available in standard fast reports via a runtime report option. TBLBookNote.Notetype = 0 identifies Booking Notes

### Statement of Work

- On the Notes tab of the booking in addition to booking notes a Statement of Work box allows the 'Scope of

Deliverables' or the description of the event to be entered. This can then be added to the necessary reports using insert field &SOFWORKC&

- Statement of work can be added to fast reports that use the **Frp\_Report\_PickList** stored procedure, or the query below can be added to a custom stored procedure.
- TBLBookNote.Notetype = 3 for Fast Reports (see *full description of tblBookNote below*)
  - ```
SELECT @StatNote = COALESCE(@StatNote, '') + '' + CAST(COALESCE(text_line, '') AS varchar(max)) FROM tblBookNote WHERE BookingNo = @booking_no AND NoteType = 3 ORDER BY line_no
```

## Payments

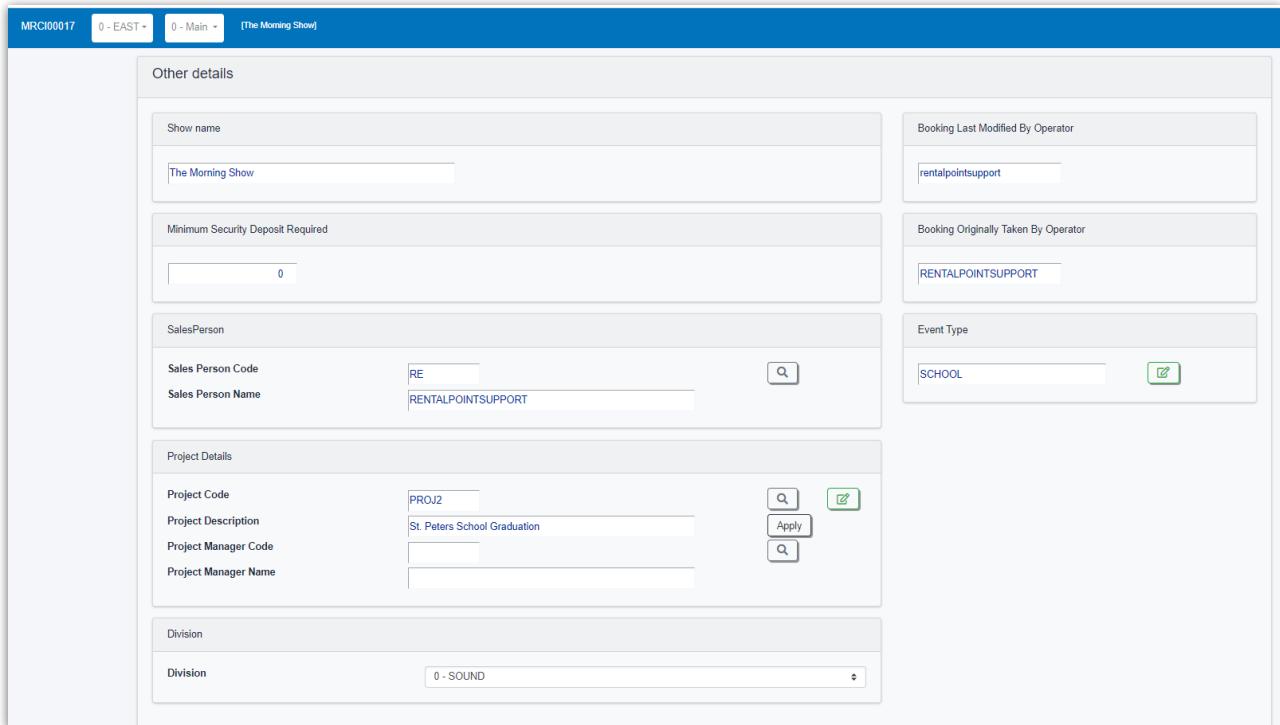
## Attachments

## Status

## Other Details

This booking tab accepts information like Showname, Event Type, Security Deposit, Project, Division, along with operator and salesperson associated with the booking.

Some fields will only be visible if configured in parameter settings



MRC100017 0 - EAST 0 - Main [The Morning Show]

Other details

Show name

The Morning Show

Minimum Security Deposit Required

0

SalesPerson

Sales Person Code: RE

Sales Person Name: RENTALPOINTSUPPORT

Event Type

SCHOOL

Project Details

Project Code: PROJ

Project Description: St. Peters School Graduation

Project Manager Code: [empty]

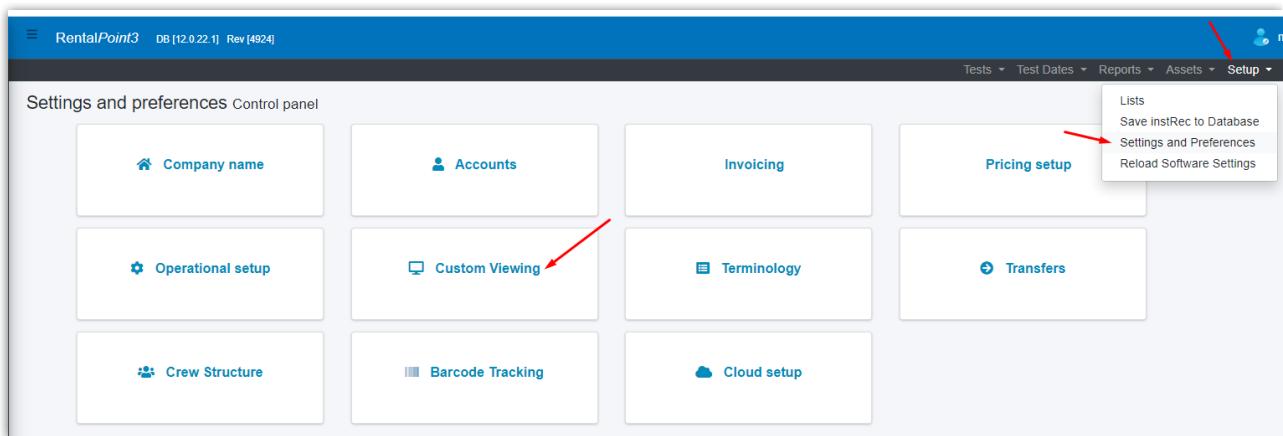
Project Manager Name: [empty]

Division

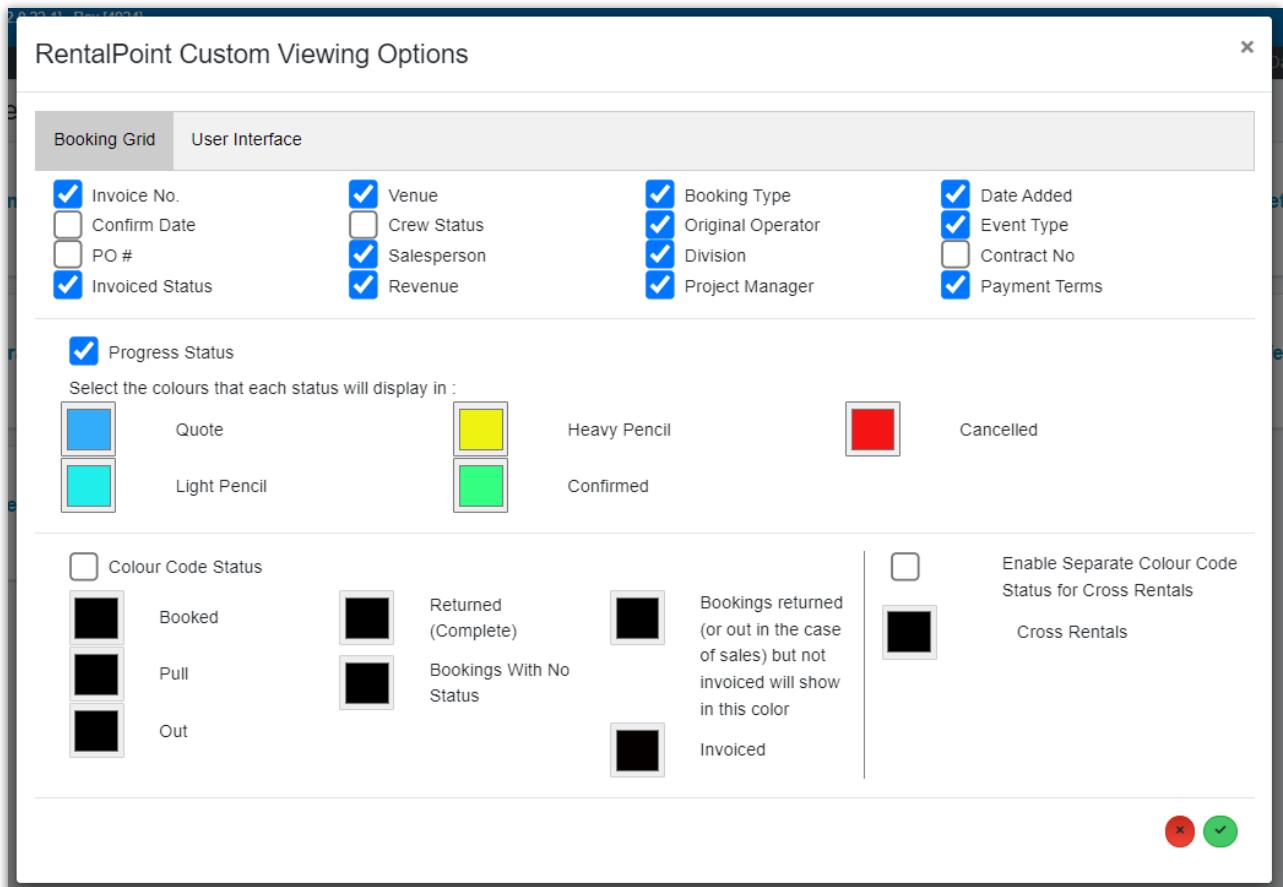
0 - SOUND

For example:

To display Event Type on the Others Tab and on the Booking Grid, ensure the option is checked in Custom Viewing Preferences



Unchecked items will be hidden from view



The Event Type drop down list is built from user entry across all bookings. Each value is stored in uppercase in the database with duplicates filtered out. Select an entry from the existing drop down list or click  to enter a new event type.

AED100025 0 - Main ▾   

Other details

|                                   |                            |                                       |                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------|----------------------------|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show name                         |                            |                                       | Booking Last Modified By Operator                                                                                                                                                                                                                                                                               |
| <input type="text"/>              |                            | rentalpointsupport                    |                                                                                                                                                                                                                                                                                                                 |
| Minimum Security Deposit Required | <input type="text"/> 0     |                                       | Booking Originally Taken By Operator                                                                                                                                                                                                                                                                            |
|                                   |                            | RENTALPOINTSUPPORT                    |                                                                                                                                                                                                                                                                                                                 |
| SalesPerson                       |                            |                                       | Event Type                                                                                                                                                                                                                                                                                                      |
| Sales Person Code                 | RP                         | <input type="button" value="Search"/> | <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <span style="margin-right: 5px;">CORPORATE</span> <span style="margin-right: 5px;">CORPORATE</span> <span>TYPE1</span> <span>TYPE2</span> </div>  |
| Sales Person Name                 | <input type="text"/> RP RP |                                       |                                                                                                                                                                                                                                                                                                                 |

To remove the new entry click 

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Other details

|                                   |                            |                                       |                                                                                                                                                                                                                                                                                                               |
|-----------------------------------|----------------------------|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show name                         |                            |                                       | Booking Last Modified By Operator                                                                                                                                                                                                                                                                             |
| <input type="text"/>              |                            | rentalpointsupport                    |                                                                                                                                                                                                                                                                                                               |
| Minimum Security Deposit Required | <input type="text"/> 0     |                                       | Booking Originally Taken By Operator                                                                                                                                                                                                                                                                          |
|                                   |                            | RENTALPOINTSUPPORT                    |                                                                                                                                                                                                                                                                                                               |
| SalesPerson                       |                            |                                       | Event Type                                                                                                                                                                                                                                                                                                    |
| Sales Person Code                 | RP                         | <input type="button" value="Search"/> | <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <span style="margin-right: 5px;">WEDDING</span>  </div>  |
| Sales Person Name                 | <input type="text"/> RP RP |                                       |                                                                                                                                                                                                                                                                                                               |

Once the tab is saved (either by saving the booking or clicking to another tab), the new entry will display as part of the existing list

AED100025 0 - Main ▾   

Other details

|                                   |                            |                                       |                                                                                                                                                                                                                                                                                                               |
|-----------------------------------|----------------------------|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show name                         |                            |                                       | Booking Last Modified By Operator                                                                                                                                                                                                                                                                             |
| <input type="text"/>              |                            | rentalpointsupport                    |                                                                                                                                                                                                                                                                                                               |
| Minimum Security Deposit Required | <input type="text"/> 0     |                                       | Booking Originally Taken By Operator                                                                                                                                                                                                                                                                          |
|                                   |                            | RENTALPOINTSUPPORT                    |                                                                                                                                                                                                                                                                                                               |
| SalesPerson                       |                            |                                       | Event Type                                                                                                                                                                                                                                                                                                    |
| Sales Person Code                 | RP                         | <input type="button" value="Search"/> | <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <span style="margin-right: 5px;">WEDDING</span>  </div>  |
| Sales Person Name                 | <input type="text"/> RP RP |                                       |                                                                                                                                                                                                                                                                                                               |