

Pick Inventory for a booking / Warehouse Prep

Last Modified on 16/02/2023 5:29 pm EST

Pick equipment for a booking using the RentalPoint Warehouse Prep mobile app OR from the RentalPoint Desktop menu. Real time updates allow multiple users to pick from the same list of equipment simultaneously!

- Picked assets are considered still in the warehouse (possibly a staging area) and set aside for a particular booking - waiting for checkout
- Checked out assets are considered 'out' of the warehouse - in use on the booking they are checked out on.

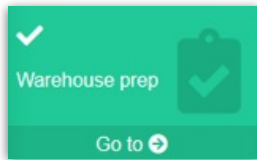


[Scan options available for RentalPoint3](#) include keyboard wedge, bluetooth and in device camera for barcode or QR Code scanning

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Mobile User Access

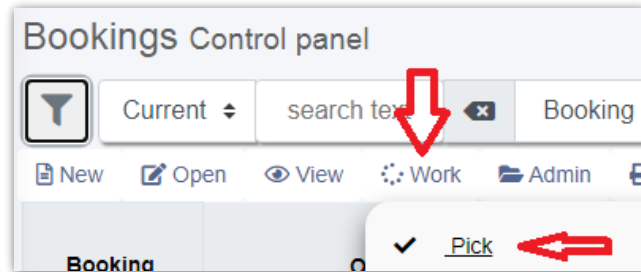


Click the  icon on the dashboard.

Desktop User Access

From the Bookings Control Panel, highlight the booking to pick equipment for,

then choose the Pick option from the Work Menu



Equipment Scope

The **Scope** area provides options to determine the range of equipment on the booking to pick.

Where available click the  to the right of headings for more information on the title



Pack a road case or rack with booking items




Unpack a road case or rack



View items already picked for this booking

Before picking, click/unclick the options below to narrow your scope as needed, then expand the SCOPE option

Select scope of equipment to pick *i*

Scope  Then expand scope

Options

- Differential - Incomplete Items only *i*
- Display Shortages *i*
- Include non-tracked components and packed items *i*
- Indent Components

Equipment Group Selection *i*

All Groups


Select Groups


Sort Order

Booking Order

Group Order (within headings, no sundries)

Inventory Order (no headings, no comments, no sundries)

First select options for inclusion/ display 

Scope can be narrowed to a single booking or expanded per options below. By default the highlighted booking is selected in the search box. Click **Single Booking** to keep this option or  to search for other bookings


Scope

Single Booking

All for Delivery Date

All for Project

Selected Headings

SOUNDB00004 


Enter a portion of the field you want to search for (show name, company, booking # or contact)

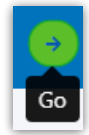
Select booking : x

Booking	Company	Contact	Show	Out Date
R400000001	Outstanding supplier		Northwest winter trade show	10/20/2020
XYZ200018	Better Co.		Northwest winter trade show	10/20/2020

Search for x Q

✓ ✗













Select the booking and click the  checkmark to accept.



Once selected use the  option to view the equipment list.

The Pick List Screen

The pick list displays equipment within the scope selected by the user.

	Move between bookings within the scope		Access more menu options (unpack road case/rack/ Booking info/Asset Status etc.)
	Identifies the number of short items for the product		Show/Hide Messages (errors & warnings window)
	Pack a road case or a rack	<input type="text" value="All"/>	Modify range of items to view in the pick window
	Scan floating items in a rack		Refresh
	Remove scanned items		Save
	Advance to next item in the list		Roadcase
	Show the assets that are reserved		

Sample 1:

Pick 🔄 ✓

ALTS315 Alto TS315 Speaker

Barcode scan + 📄 📝

SOUNDB00004 📋 All

Description	To do	Needed
ALTS315 Alto TS315 Speaker	1	1
TS315CAS Alto TS315 Speaker CASE	1	1
TS315CAB TS315 10' Cable	1	1
MXPRO MX Processor	1	1
SUBW Subwoofer ↓1	2	2

Sample 2:

Pick 🔄 ✓

RCFNX15 RF 15 Floor Standing Speaker

Barcode scan + 📄 📝

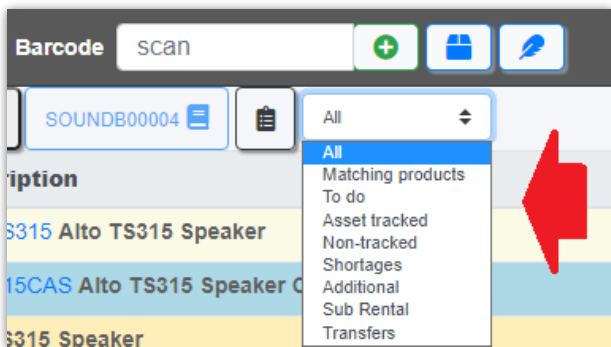
WCVWALD00001 📋 All

Description	To do	Needed
RCFNX15 RF 15 Floor Standing Speaker ⚖️27.2 KG ↓18 📄	20	20
NX15CASE RCF NX15 Speaker CASE ↓7	19	19
NX15CASE RCF NX15 Speaker CASE	1	1
NX1510 NX15 10' Cable	20	20
SIGFP Sigma fp L Mirrorless Digital Camera ↓3	2	5

📄 - unit weight 📄 - cross rental 📄 - bin location 📄 - transfer 📄 - quick turnaround 📄 - in rack

Modify Grid View

The number of items visible in the grid can be narrowed down by selecting one of the options



Matching Products – Show all lines with a product matching the currently selected line

To Do – Only display lines that still need to be picked

Asset Tracked - Show Assets (items with a unique barcode) to be picked only

Non-Tracked - Show only items that are NOT tracked with a unique barcode

Shortages - Show only items that are short

Additional - Show only items that have been scanned that are *NOT* on the booking (i.e. items added at checkout)

Cross rental/Sub hire – Only display lines that are assigned to a cross rental PO

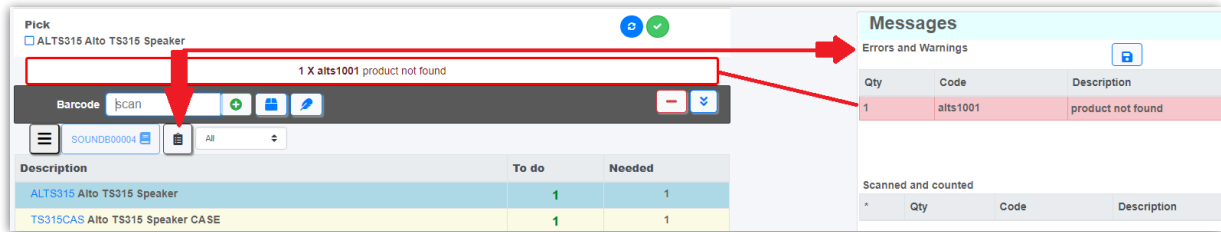
Transfers – Only display lines that are assigned to a transfer

Q.T./D.A.T. – Only display lines that will be resolved by a quick turnaround or direct transfer from another booking

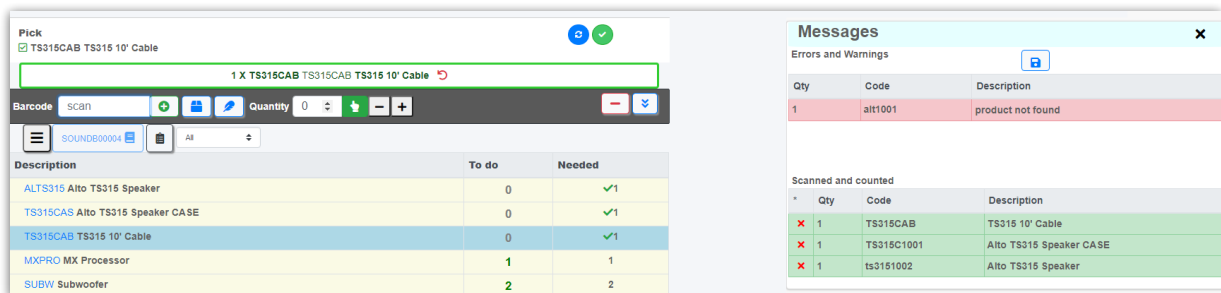
Barcode Items

1. Click on an item in the list, then scan the barcode to pick that item

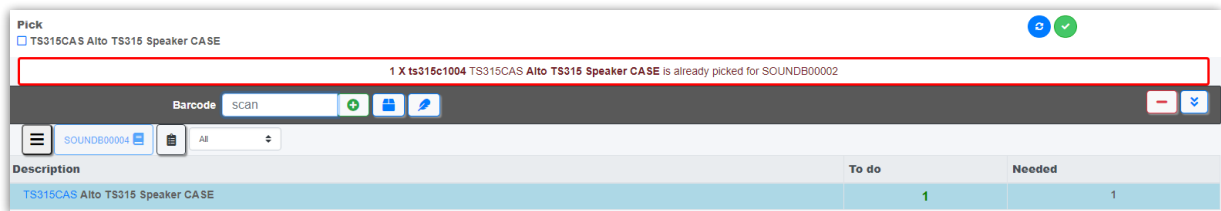
- Errors will show up red on the Message Board (warnings will show in yellow)



- Successful scans will show up green on the Message Board.
- A check mark will show under the 'Needed Column' for that item in the list while the 'To do' qty will be decremented




- Items picked for other bookings will not be available for picking



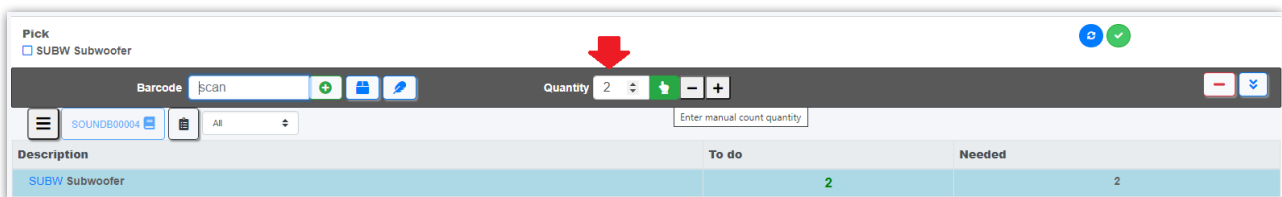
Non Barcoded Items

Non Barcode Tracked items can be scanned using the non tracked barcode from Product Setup

OR using the  on-screen option. The quantity defaults to the number of that item needed.

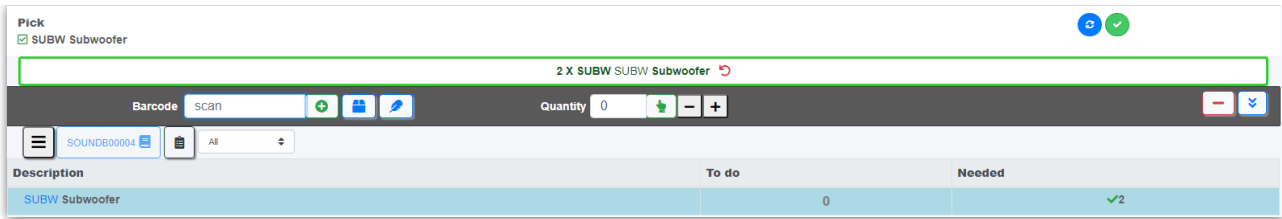
Simply click  to pick that quantity

Before Pick




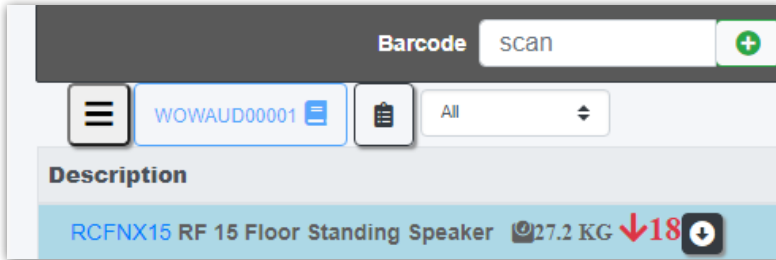
After Pick





Reserved Assets

The  icon on any line identifies reserved assets for that item click the icon to display a list of *reserved assets* and their pick status.

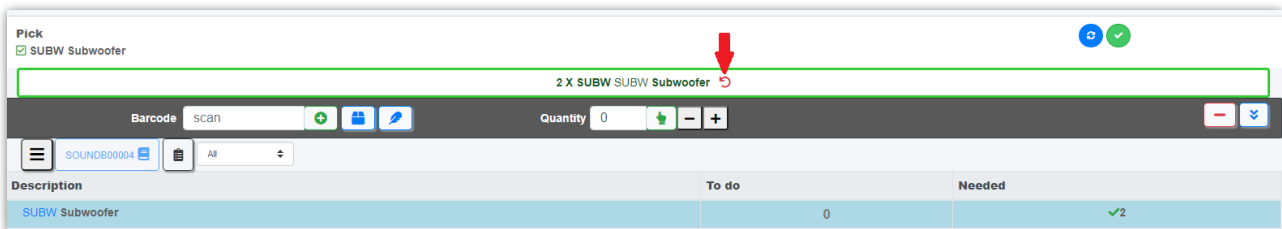


Assets reserved for WOWAUD00001

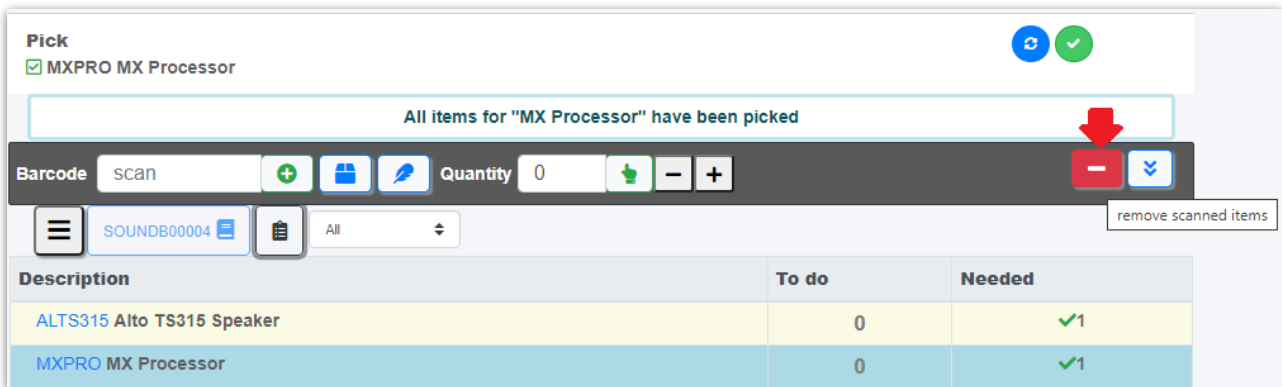
Description	Barcode	Serial No.	Bin location	Status
RF 15 Floor Standing Speaker	RF1003			To do

Undo Pick

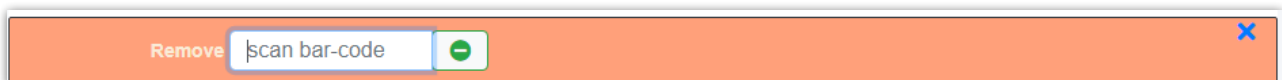
Undo the last item picked using the  icon to the right of the picked item





To undo a pick from the current list, click the  remove icon

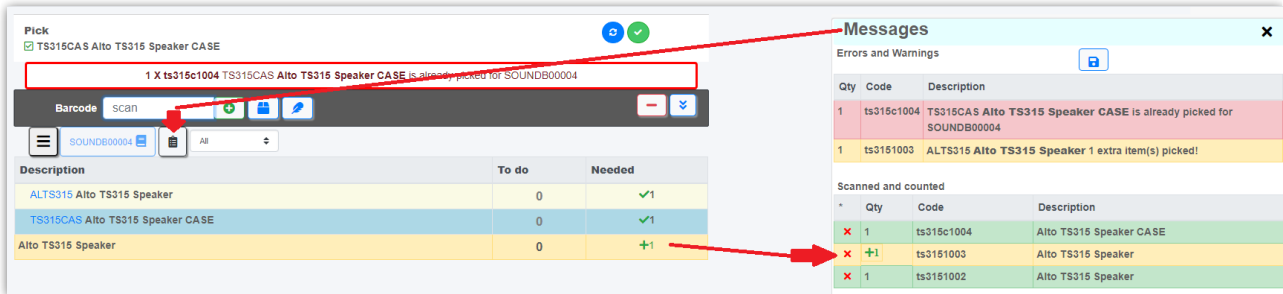


Then scan the barcode to remove OR  to cancel the operation

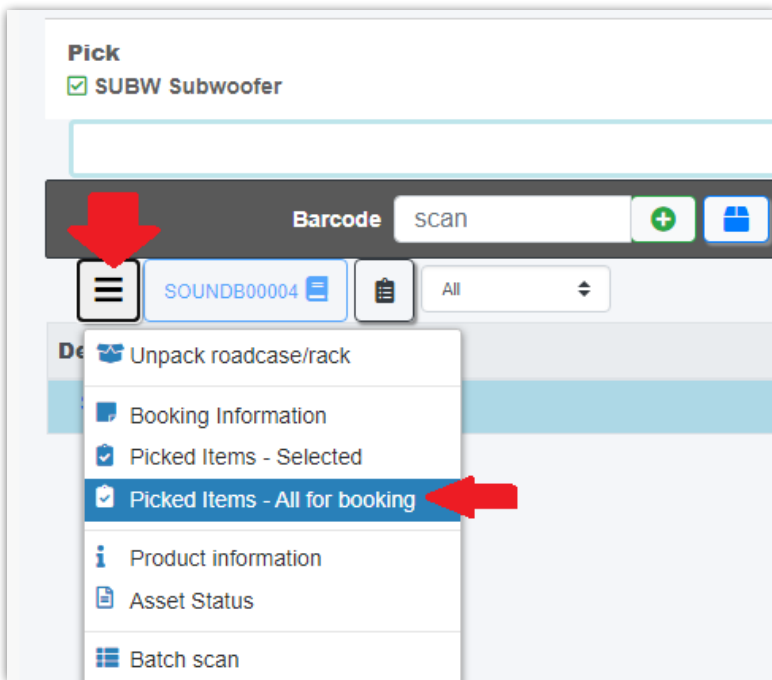


Alternatively, open the Message Board and click the X to the left of any scanned item

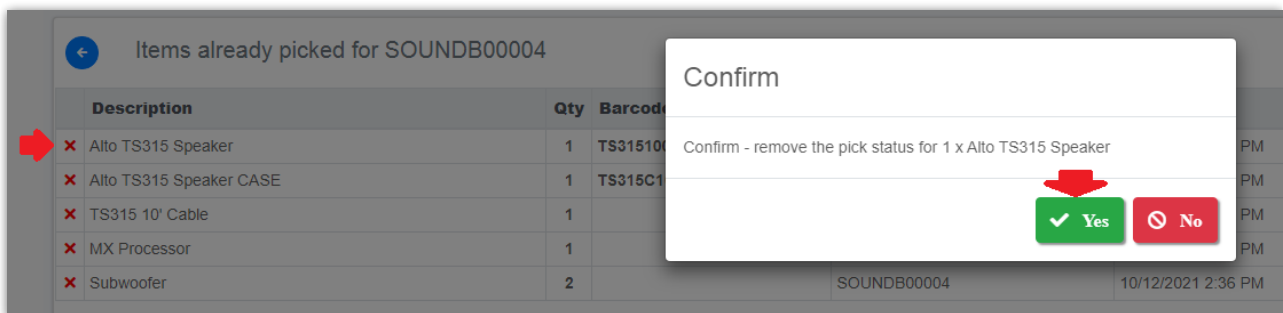
Below, the  shows that an extra asset has been scanned. Simply click the  to remove/undo the scan for that item



To undo a previously saved pick, pull up a list of previously picked items



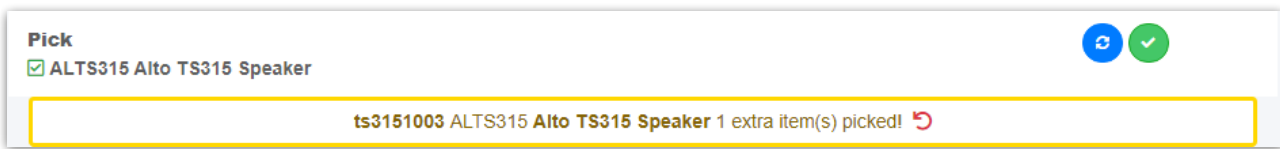
Then click the x to the left of the item to remove and confirm



The Message Board

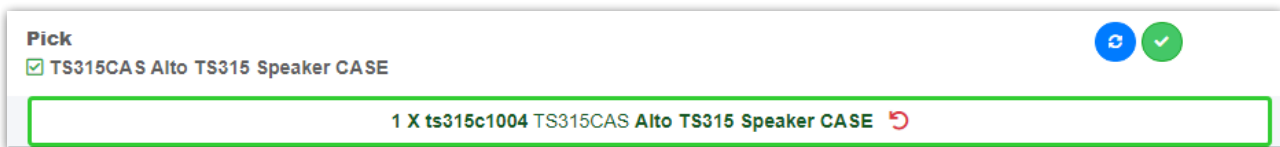
Errors and warnings show up colour coded as follows

WARNING



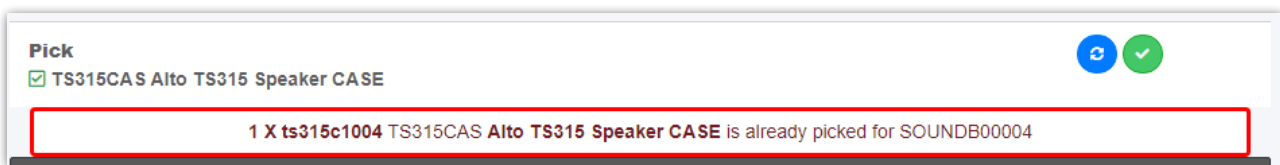
A screenshot of a warning message board. At the top left, it says "Pick" followed by a checked checkbox and "ALTS315 Alto TS315 Speaker". At the top right, there are two circular icons: a blue one with a refresh symbol and a green one with a checkmark. Below this, a yellow-bordered box contains the text "ts3151003 ALTS315 Alto TS315 Speaker 1 extra item(s) picked!" followed by a red circular refresh icon.

SUCCESS

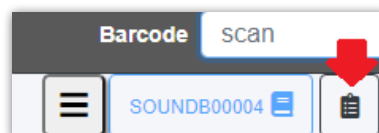



A screenshot of a success message board. At the top left, it says "Pick" followed by a checked checkbox and "TS315CAS Alto TS315 Speaker CASE". At the top right, there are two circular icons: a blue one with a refresh symbol and a green one with a checkmark. Below this, a green-bordered box contains the text "1 X ts315c1004 TS315CAS Alto TS315 Speaker CASE" followed by a red circular refresh icon.


ERROR



A screenshot of an error message board. At the top left, it says "Pick" followed by a checked checkbox and "TS315CAS Alto TS315 Speaker CASE". At the top right, there are two circular icons: a blue one with a refresh symbol and a green one with a checkmark. Below this, a red-bordered box contains the text "1 X ts315c1004 TS315CAS Alto TS315 Speaker CASE is already picked for SOUNDB00004".



Access the Message Board using the  icon to the right of the Booking Number at the top of the screen. This is a toggle icon, so you can click the icon a second time to remove the board.

Use the  icon to save errors to a file and clear the 'on screen' error list. Files are saved to the `hpdata_dir\Error Lists` using the booking number (`hp_data` is defined during setup in your `web.config` file)

Use the X to the left of any item to remove the pick for that item

Messages ✕			
Errors and Warnings 			
Qty	Code	Description	
1	ts315c1004	TS315CAS Alto TS315 Speaker CASE is already picked for SOUNDB00004	
1	ts3151003	ALTS315 Alto TS315 Speaker 1 extra item(s) picked!	
Scanned and counted			
*	Qty	Code	Description
✕	1	ts315c1004	Alto TS315 Speaker CASE
✕	+1	ts3151003	Alto TS315 Speaker
✕	1	ts3151002	Alto TS315 Speaker

List Information

Extra information may appear beside the item description as below:

BLUE Blue chairs (swivel) MYVEND00015 Item is assigned to a cross rental/sub hire

Channel 1 Line is short by number indicated

mp 3.3 lbs Item unit weight

hones A9020 Bin location of Item

THESHOW00005 Item is direct transferred from specified booking

THESHOW00005 Quick turnaround coming from the specified booking

LEDP LED Panel Item is in a rack

P10034 Dual Source 5 Out Audio DA T0000000000005 Item is being transferred from another warehouse location

Multiple Bookings

When there is more than one booking in the equipment scope selected by the user - i.e. if a user selected a project or delivery date

Select scope of equipment to pick **i**

Scope

Single Booking
 All for Delivery Date
 All for Project
 Selected Headings

WOWGALA

Move between the Bookings within the scope by clicking the current booking. This will show a list of other bookings available for picking. Select any booking in the list to load the equipment list for that booking based on the initial scope.

Pick

Barcode scan

WOWAUD00002

Description

Breakout Session 1 Friday, July 1, 2022 to Friday, July 1, 2022

ALTS315 Alto TS315 Speaker ↓1

TS315CAS Alto TS315 Speaker CASE

Bookings to do

WOWAUD00005 Wow Annual Gala 2022

Additional Equipment

Items that are not on the original booking equipment list, when scanned, will either show an error message indicating they cannot be picked, or a warning showing they will be added as an extra item. *This is controlled by Barcoding parameter #10 "Can add non-components"*

GS109 Generic Stereo Headphones 1 extra item(s) picked! ↻

Extra items picked will appear with a plus icon in the qty column, indicating that they are not listed on the original equipment list for the booking

✖ +1 GS109 Generic Stereo Headphones

NOTE: While picked for the booking, additional items scanned at the pick stage do NOT add items to the actual booking at this point.

Picked items will be added to the booking at time of checkout.

Pick a Road Case/Rack

Road cases/ racks are picked in the same way as other equipment. Simply scan the barcode of the road case/rack item.


Description	To do	Needed
RCFNX15 RF 15 Floor Standing Speaker 27.2 KG	1	1
NX15CASE RCF NX15 Speaker CASE	1	1
NX1510 NX15 10' Cable	1	1

All items registered in RentalPoint as currently packed in the rack/road case will be picked when the rack/road case is picked.

Description	To do	Needed
RCFNX15 RF 15 Floor Standing Speaker 27.2 KG	0	✓1
NX15CASE RCF NX15 Speaker CASE	0	✓1
NX1510 NX15 10' Cable	0	✓1

Unpacked Racks/Cases can be packed from the Pick window using the  icon

Quantity	Description	Barcode
1	NX1510 NX15 10' Cable	NX15CAB
1	RCFNX15 RF 15 Floor Standing Speaker Warning - asset needs testing.	RF1004

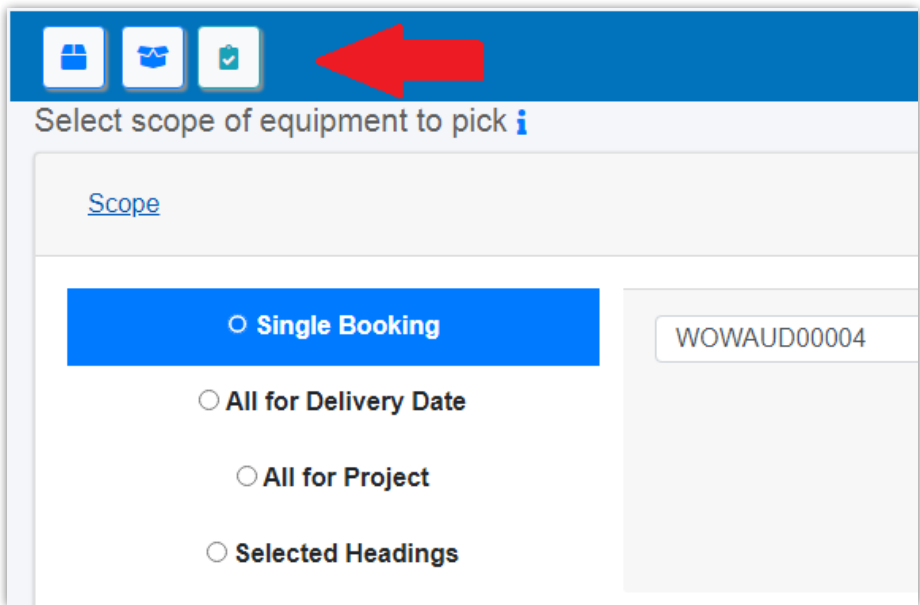
The packed case is picked once saved using the  icon. Again all items in the case are picked when the case is picked

Similarly, removing the case from the 'Picked' items, will remove all packed items too

Description	Qty	Barcode	Booking	Time	Operator	Status
RCF NX15 Speaker CASE	1	NX151001	WOWAUD00004	10/13/2021 1:27 PM	RP	Picked
NX15 10' Cable	1		WOWAUD00004	10/13/2021 1:27 PM	RP	Picked
RF 15 Floor Standing Speaker	1	RF1004	WOWAUD00004	10/13/2021 1:27 PM	RP	Picked

NOTE: To Pack/Unpack road cases or racks *without* picking them, use the icons on the SCOPE or Racks and Road Caes Window.

Items unpacked from a rack/road case will be 'unpicked' from the booking too.

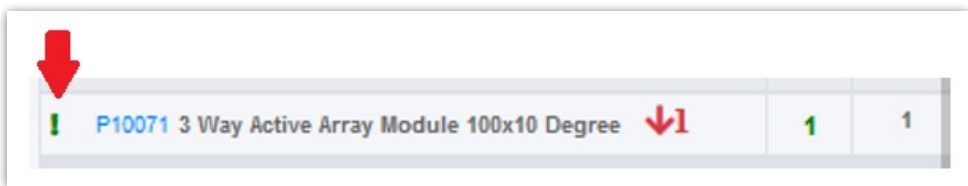


Refresh the Pick List

At certain points when scanning equipment, the pick list will be updated to reflect changes made by other users.

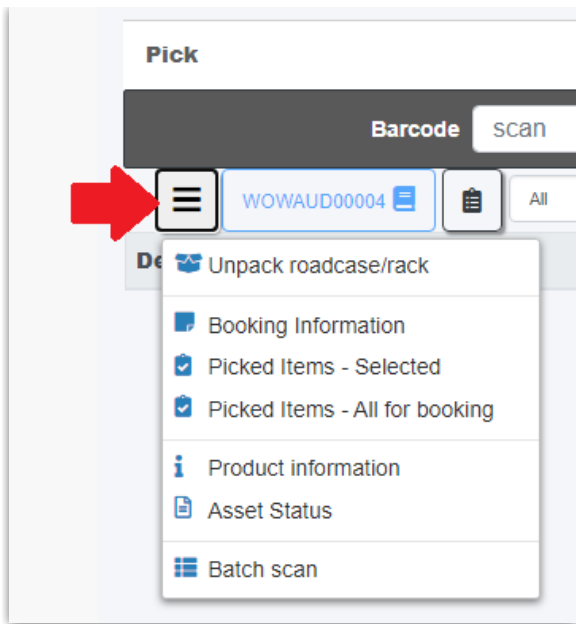
Operators can manually refresh the list by clicking the  refresh icon at the top of the page. The refreshed display will reflect 'picks' made by other operators.

An exclamation point will appear beside the line where a new pick was added by another user.



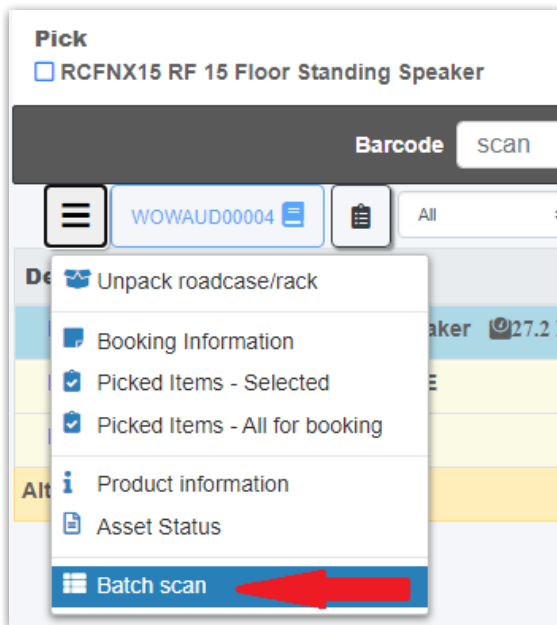
Additional Options

Accessible via the  icon, view booking/product/asset/pick information and/or unpack a road case



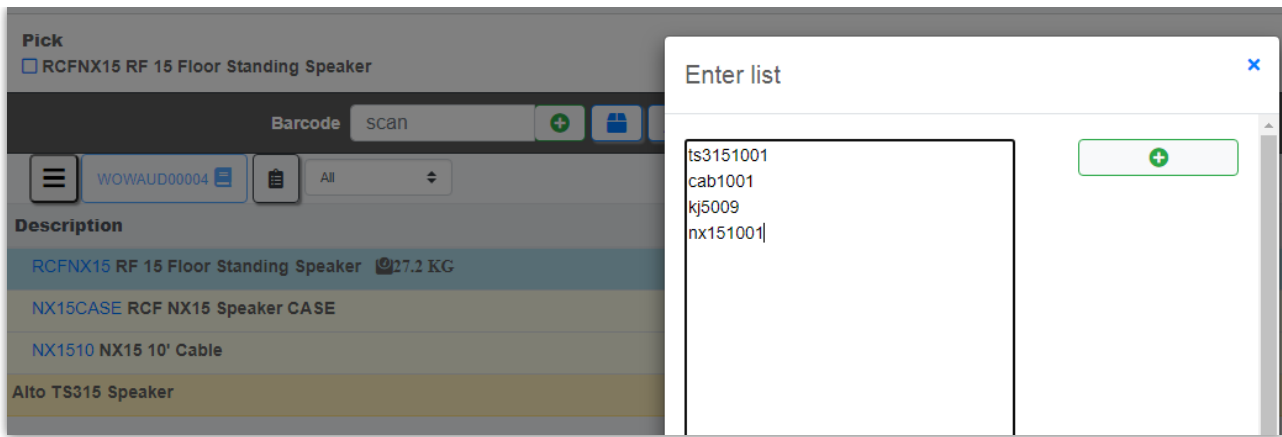
Batch Scan

Open the 'Batch Scan' option to scan multiple items without moving through the pick list

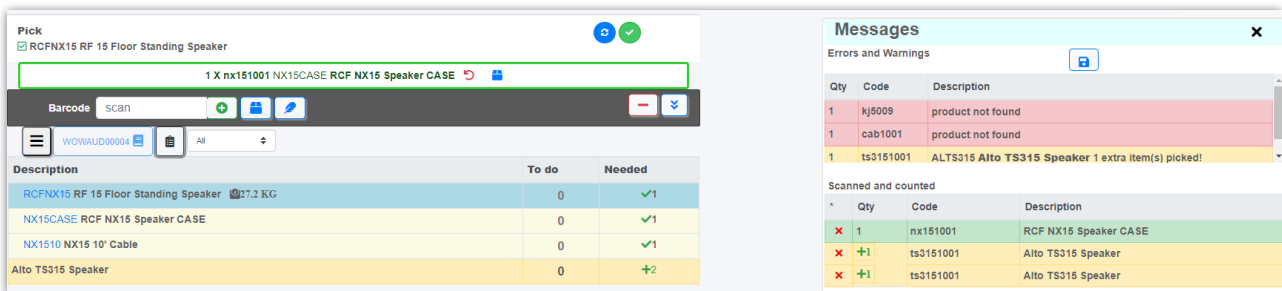


Then scan or copy/paste your barcodes into the scan window and click





All items will be scanned to the booking, with errors and warnings registered where applicable

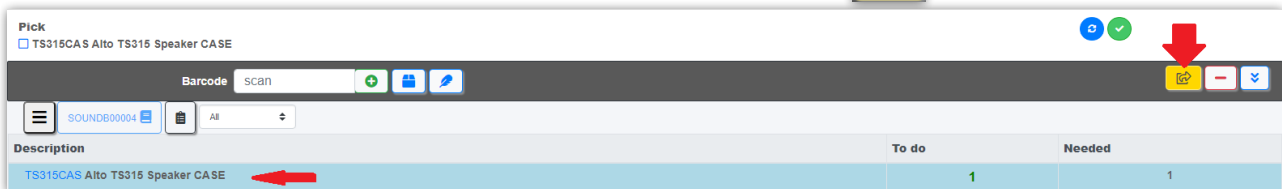


Substitutions



Substitutions of equipment can be made within the pick list window. The original line will be hidden from the pick list but will still be included on the invoice. The new item will be visible to the warehouse but will not affect the price.

Operators must have the "Resolve Discrepancy" Operator privilege in order to see the substitutions option in the Pick window



To make a substitution, first, select an item to replace in the list, then click

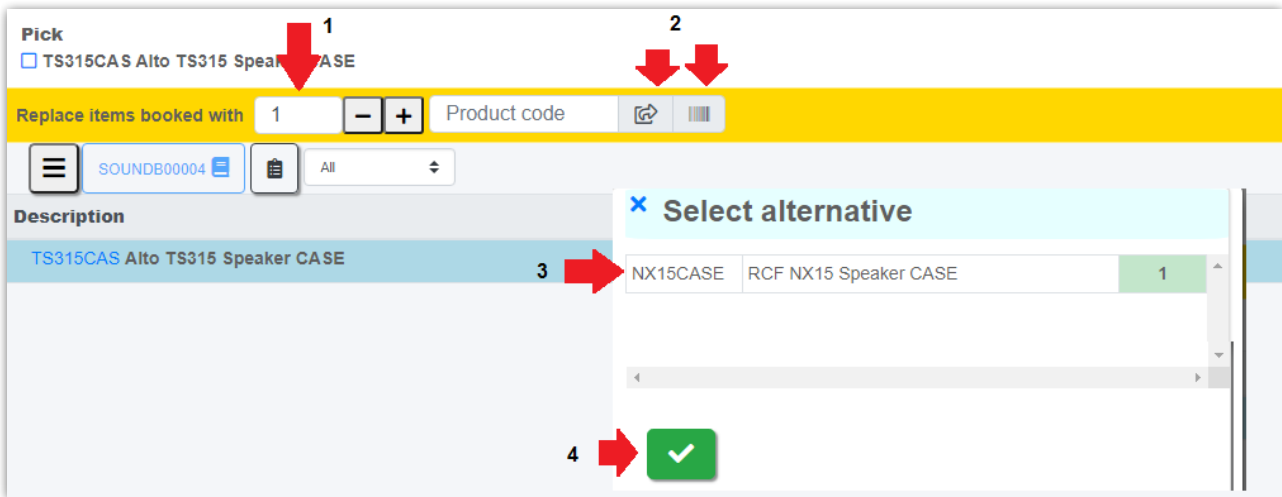


The action bar will be replaced with the yellow substitute bar (see screenshot below):

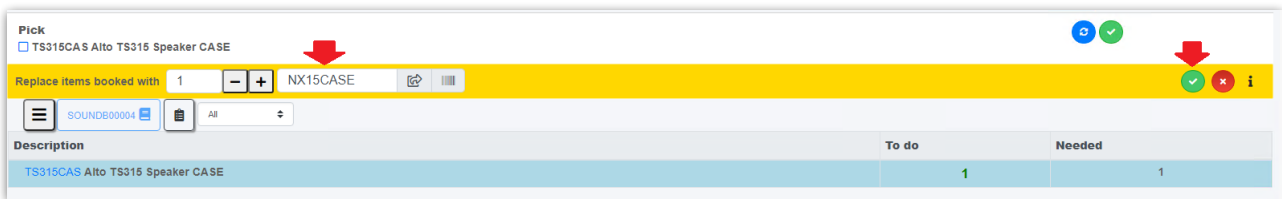
1. Select the quantity on the line that should be replaced
2. Enter the product:
 1. either by pressing  to select from a list of alternatives
 2. or by pressing  and scanning the barcode of the item to be selected.
3. Select the alternative item from the list (*when selecting from a list of alternatives the current availability of*

each item appears beside the description)


4. Click to  commit or  to cancel the selection

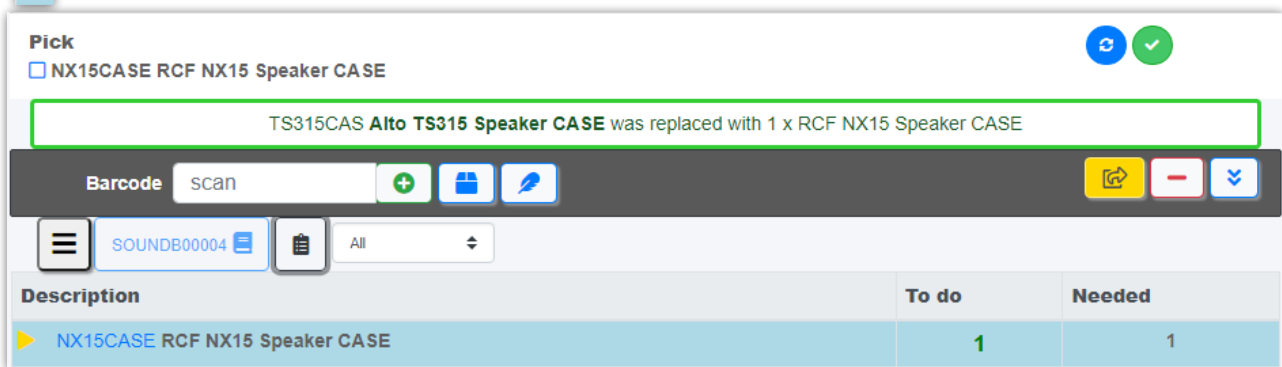



Once the substitute item has been selected, click  to save or  to cancel the substitution



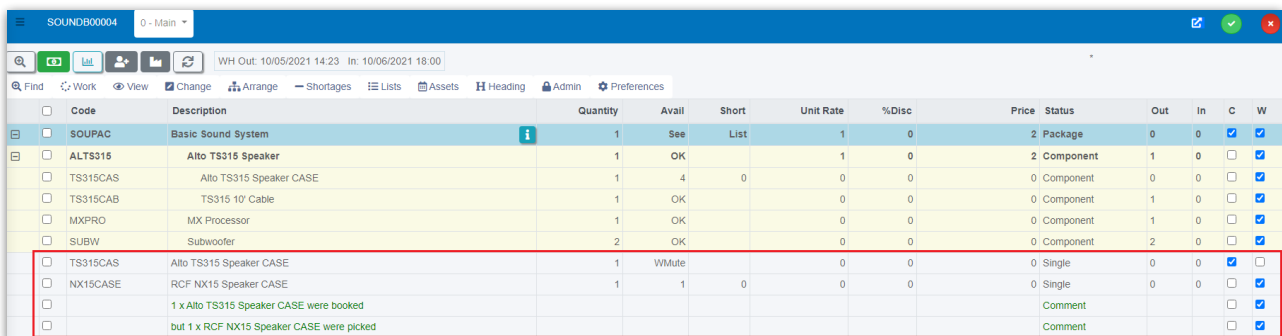
Description	To do	Needed
TS315CAS Alto TS315 Speaker CASE	1	1

Below the Product has been substituted but still needs to be scanned. The substituted product is identified with a  icon to the left of the product




Description	To do	Needed
 NX15CASE RCF NX15 Speaker CASE	1	1

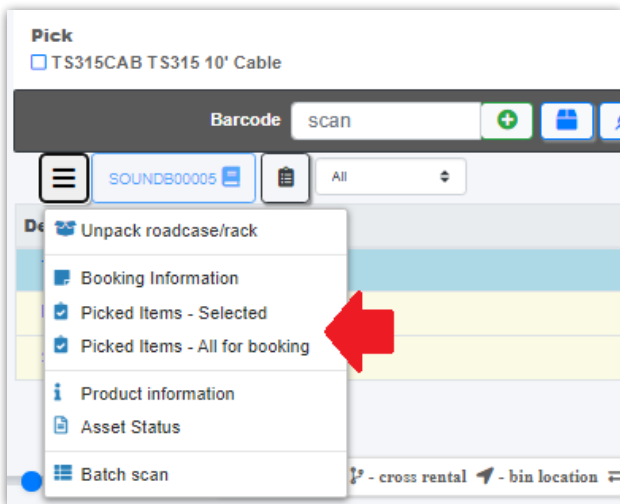
Here's how the substitution shows in the booking







Code	Description	Quantity	Avail	Short	Unit Rate	%Disc	Price	Status	Out	In	C	W
TS315CAS	Alto TS315 Speaker CASE	1	W/Mute		0	0	0	Single	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NX15CASE	RCF NX15 Speaker CASE	1		0	0	0	0	Single	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	1 x Alto TS315 Speaker CASE were booked							Comment			<input type="checkbox"/>	<input checked="" type="checkbox"/>
	but 1 x RCF NX15 Speaker CASE were picked							Comment			<input type="checkbox"/>	<input checked="" type="checkbox"/>

Session List

Previously picked items can be displayed by clicking on the menu button  and selecting from the available options. These options include current & previous session lists for all operators.



Description	Qty	Barcode	Booking	Time	Operator	Status
RCF NX15 Speaker CASE	1	NX151001	SOUND00005	10/19/2021 4:15 PM	RP	Picked
NX15 10' Cable	+1		SOUND00005	10/19/2021 4:15 PM	RP	Picked
RF 15 Floor Standing Speaker	+1	RF1004	SOUND00005	10/19/2021 4:15 PM	RP	Picked
RF 15 Floor Standing Speaker	1	RF1231001	SOUND00005	10/19/2021 4:24 PM	RP	Picked

1. Click  to remove picked items from the list
2. Items that will be added to the booking on checkout are identified with a  to the left of the Qty field
3. Items packed into a road case/rack are identified with a  icon to the left of the product description. Removing the road case/rack product here will remove all the packed items with it but the items will remain packed in the case. To remove a single item, open the road case/rack in the pack window.
4. Use the  to go back to the Pick menu

Check Out Prep Session

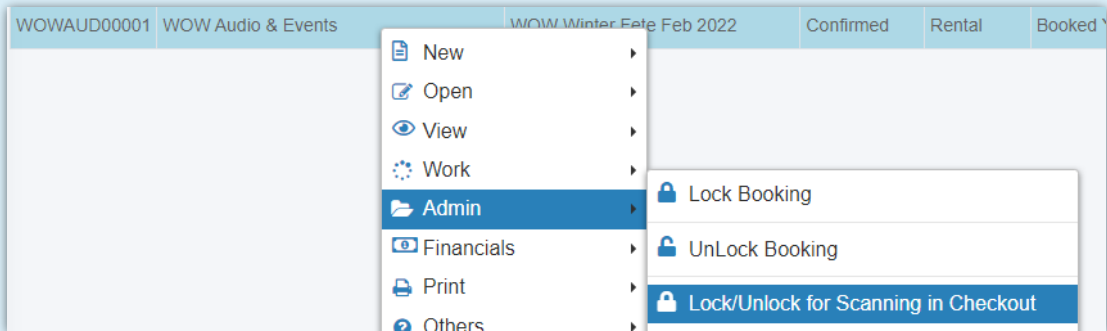
Warehouse prep sessions can be loaded into the checkout window in **RentalPoint Desktop** so that items don't need to be re-scanned before loading.

Session ID	Operator	Day	Date	Time	Day	Date
SOUND00005	Experience	Fri	10/1/2021	14:23	Tue	10/1/2021
SOUND00006	Experience	Wed	10/27/2021	00:00	Thu	10/27/2021
SOUND00007	Experience	Mon	10/4/2021	09:00	Thu	8/4/2021
SOUND00009	Experience	Mon	10/4/2021	09:00	Tue	10/4/2021
SOUND00010						11/4/2021
SOUND00011						11/4/2021
SOUND00012						10/4/2021

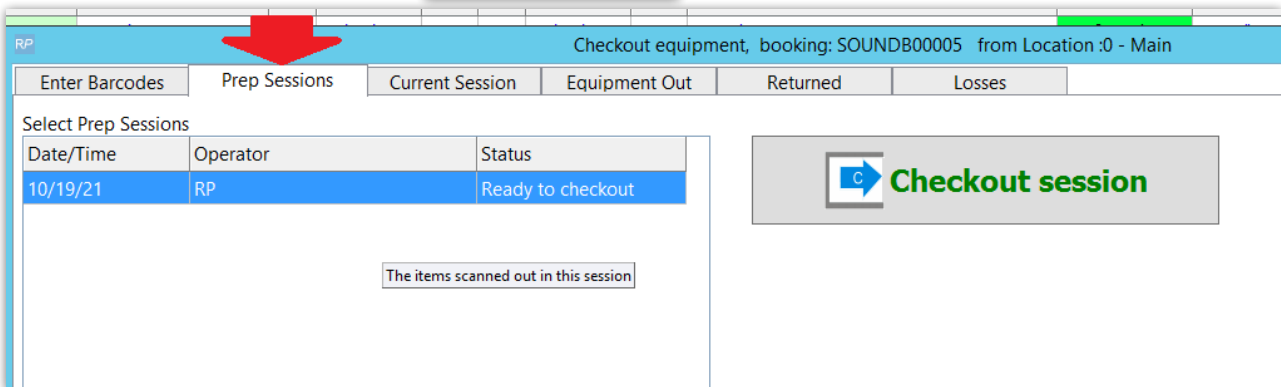
In the Checkout window click on the **Prep Sessions** tab.

Exceptions:

- Barcode Parameter #45 Use Warehouse Prep must be ON for the 'Prep Sessions' tab to display.
- Bookings **Locked for Checkout** will not show the 'Prep Session' tab,
 - Unlock the booking to proceed (Operator privileges apply)



Select the session to check out, then click



All the assets, non-tracked items and cross rented/sub hired equipment in the prep session will be loaded. Any errors found in the session will be listed in the Errors and warnings window.

The operator should then click the save button to complete the checkout.

