Pick Inventory for a booking / Warehouse Prep

Last Modified on 15/09/2025 3:34 pm EDT

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!

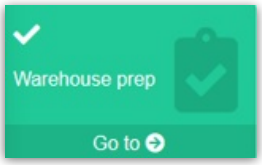
- Picked assets are considered still in the warehouse (possibly a staging area) and set aside for a particular booking - waiting for checkout
- Checked out assets are considered 'out' of the warehouse - in use on the booking they are checked out on.

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

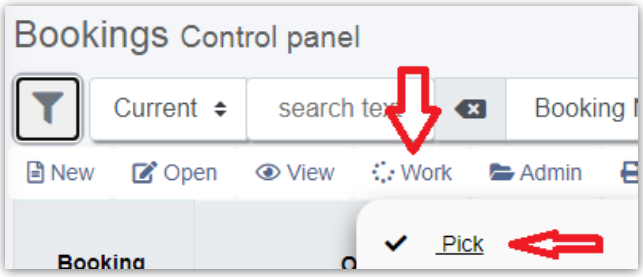
Click the 

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.

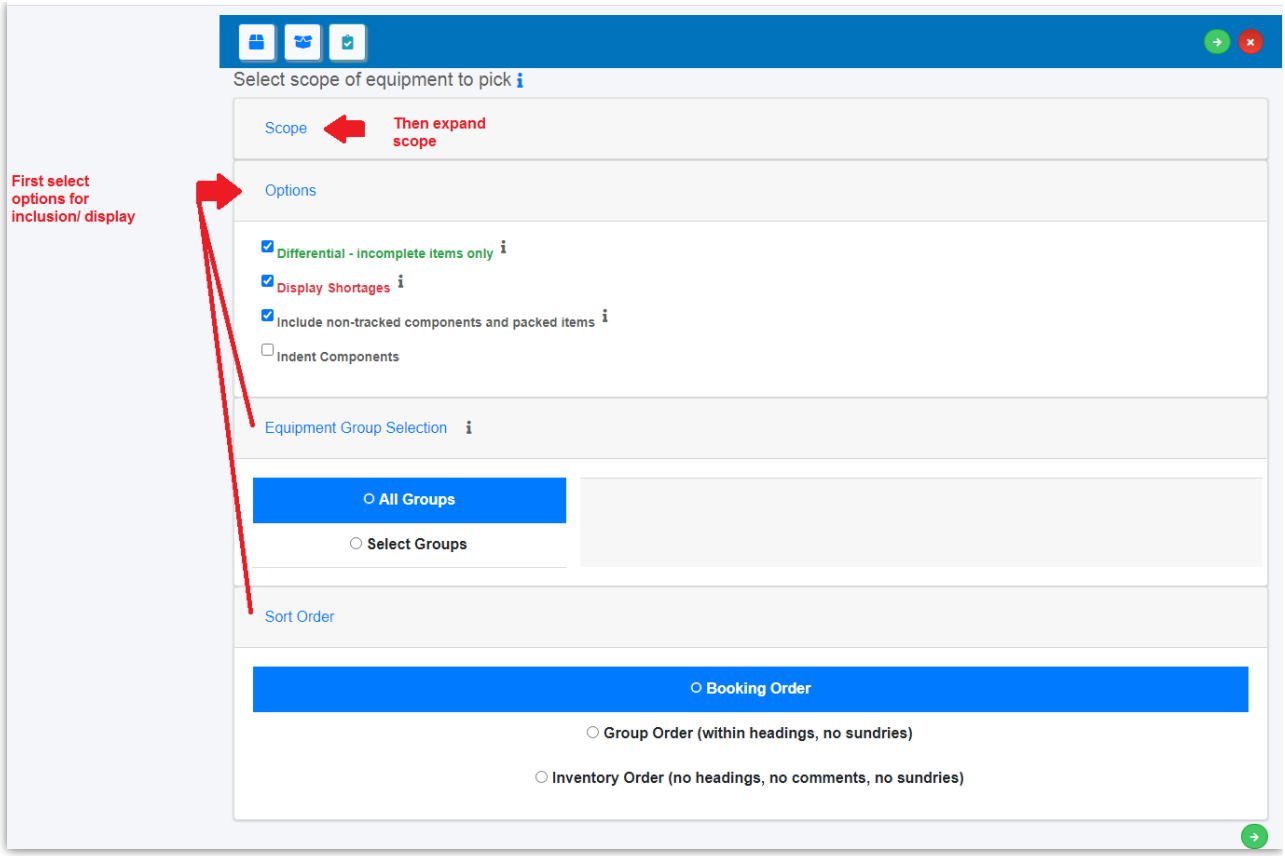
Where available click the  to the right of headings for more information on the title

 Pack a road case or rack with booking items

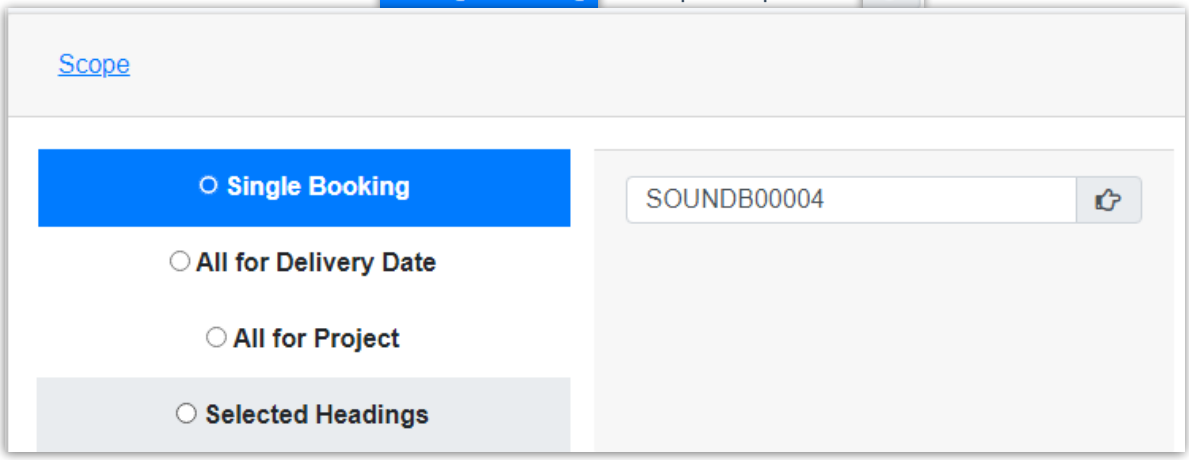
 Unpack a road case or rack

 View items already picked for this booking

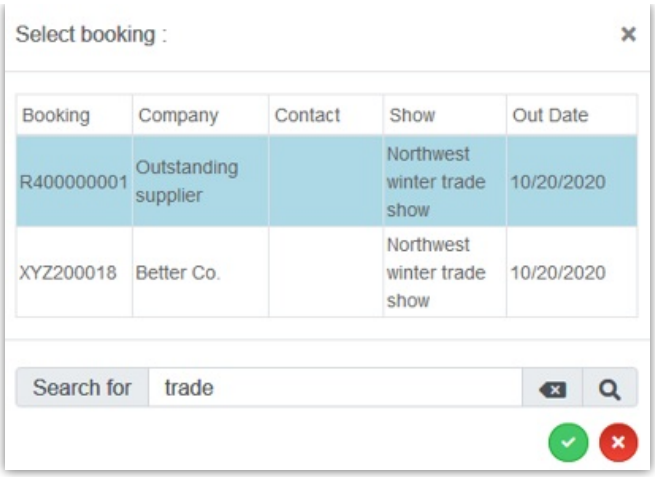
Before picking, click/unclick the options below to narrow your scope as needed, then expand the SCOPE option



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



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



Select the booking and click the  checkmark to accept.

Once selected use the 

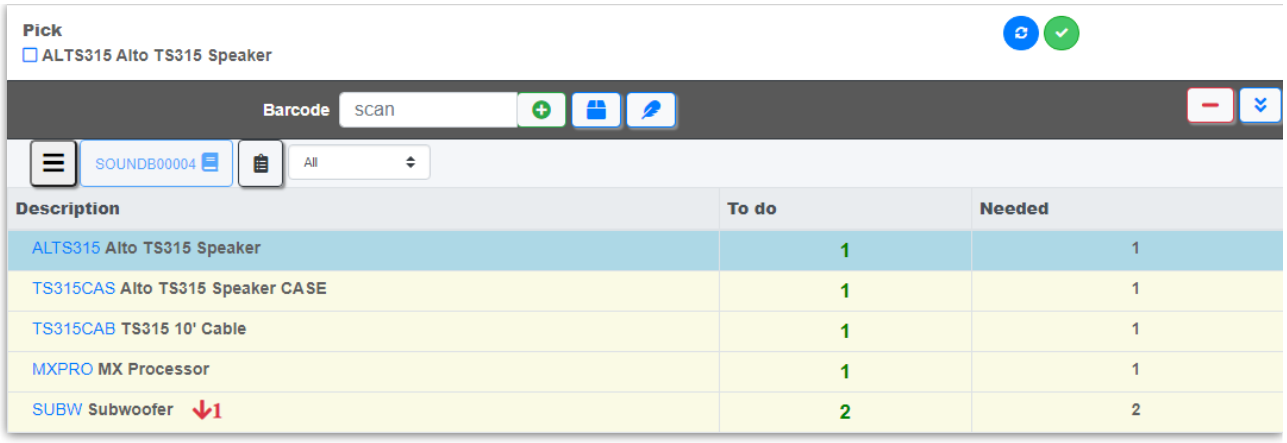
option to view the equipment list.

The Pick List Screen

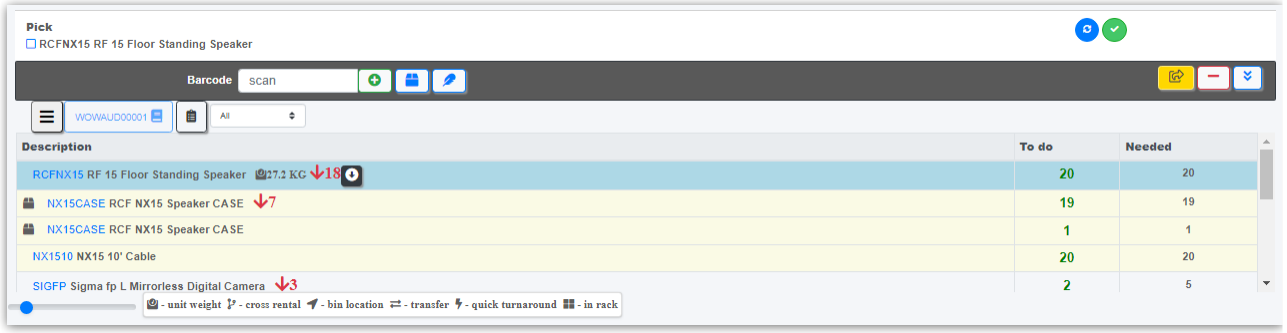
The pick list displays equipment within the scope selected by the user.

	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		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		Toggle comments on/off in equipment list

Sample 1:

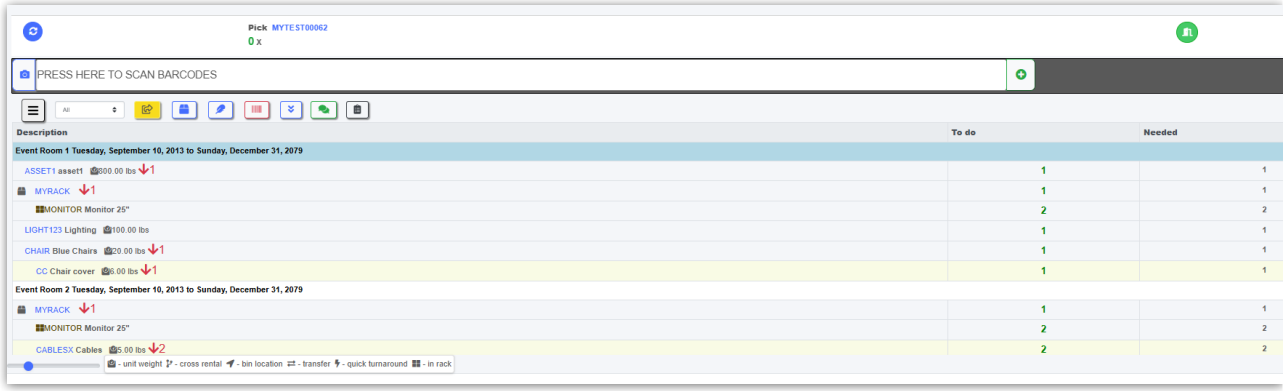


Sample 2:



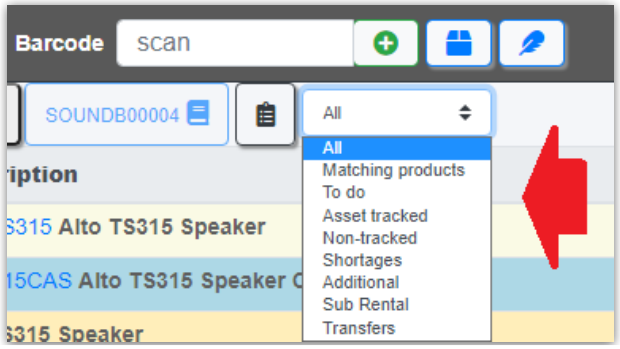
Sample 3:

Headings now display in Pick Window



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

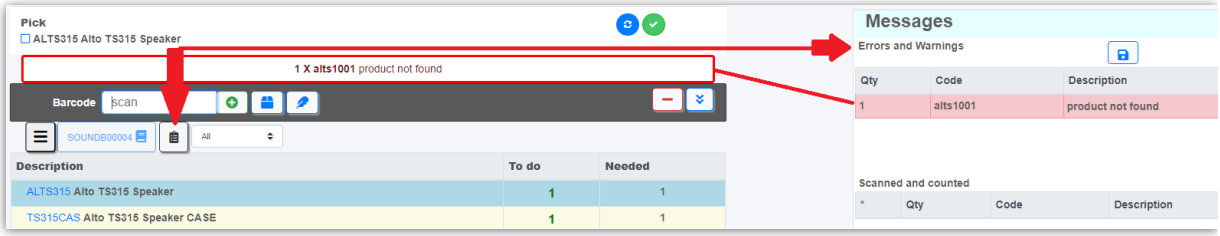
Transfers – Only display lines that are assigned to a transfer

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

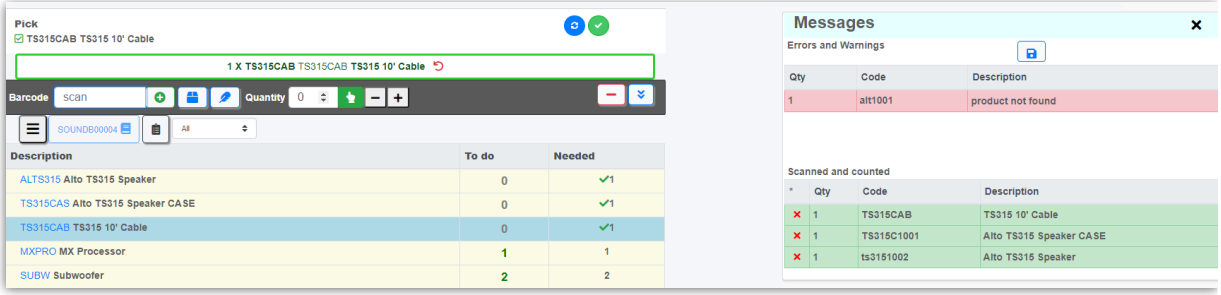
Barcode Items

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

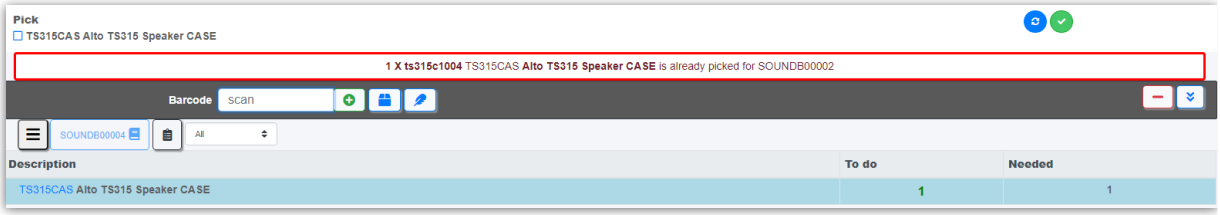
- Errors will show up red on the Message Board (warnings will show in yellow)



- 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

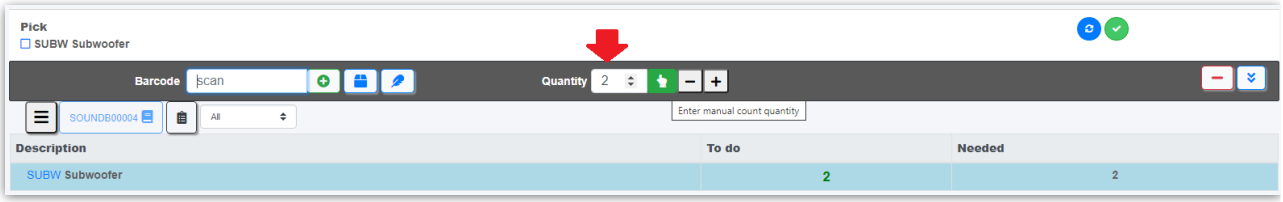
Non Barcode Tracked items can be scanned using the non tracked barcode from Product Setup

OR using the 

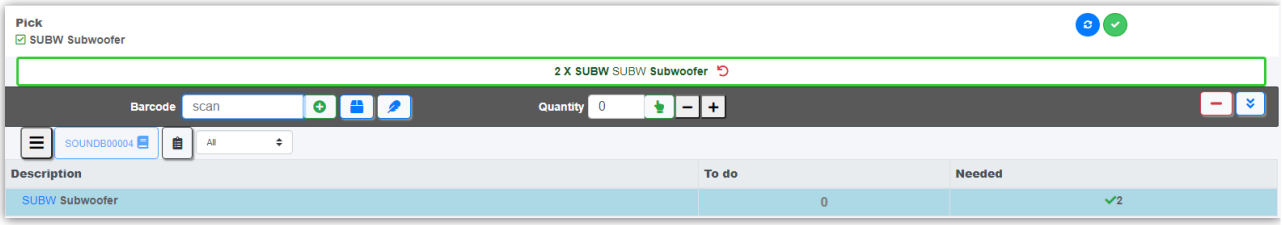
on-screen option. The quantity defaults to the number of that item needed.

Simply click  to pick that quantity

Before Pick

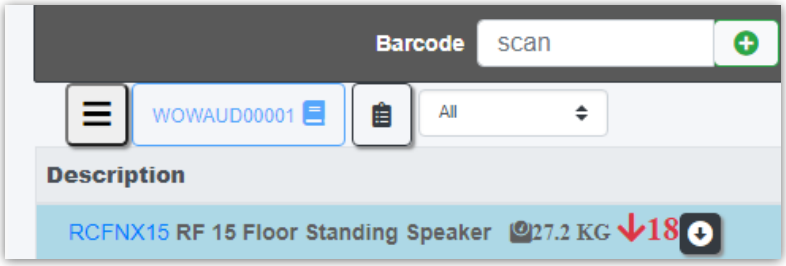


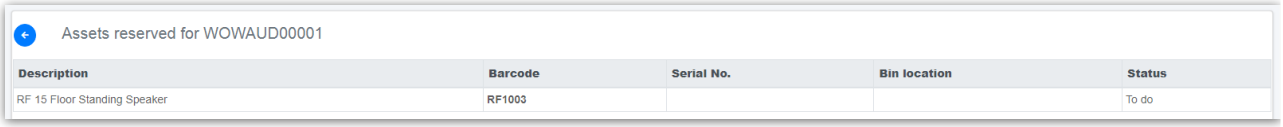
After Pick



Reserved Assets

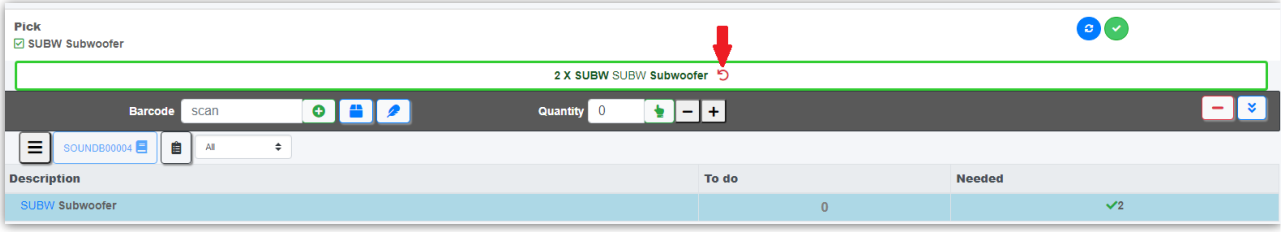
The  icon on any line identifies reserved assets for that item click the icon to display a list of *reserved assets* and their pick status.



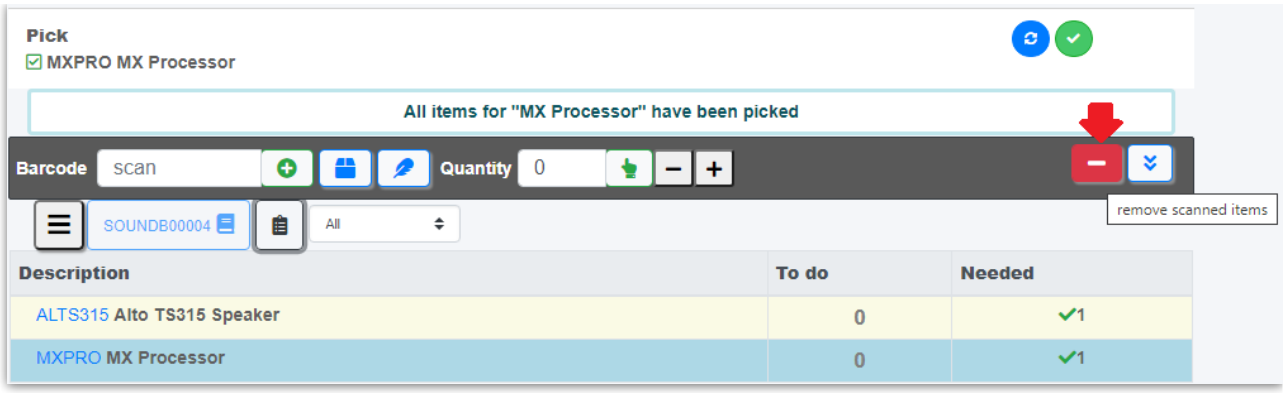


Undo Pick

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

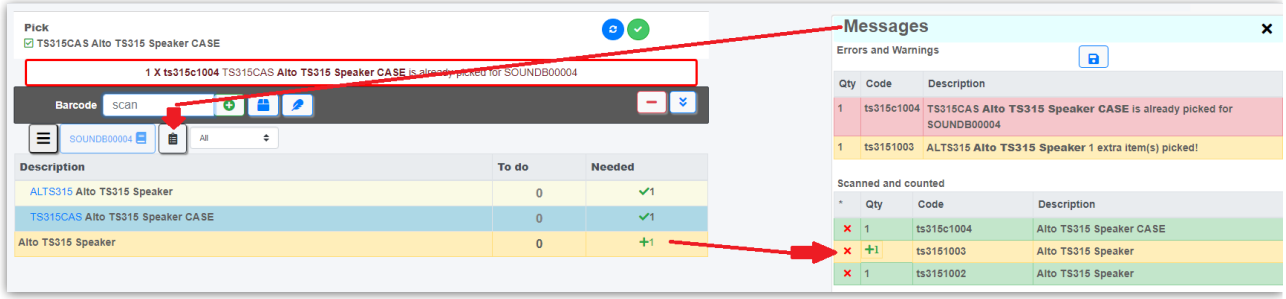


Then scan the barcode to remove OR  to cancel the operation

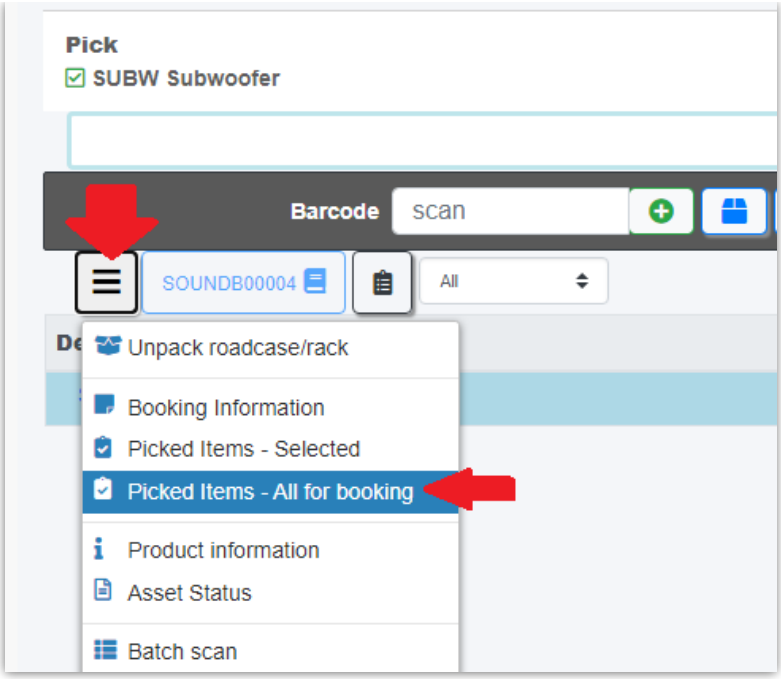


Alternatively, open the Message Board and click the X to the left of any scanned item

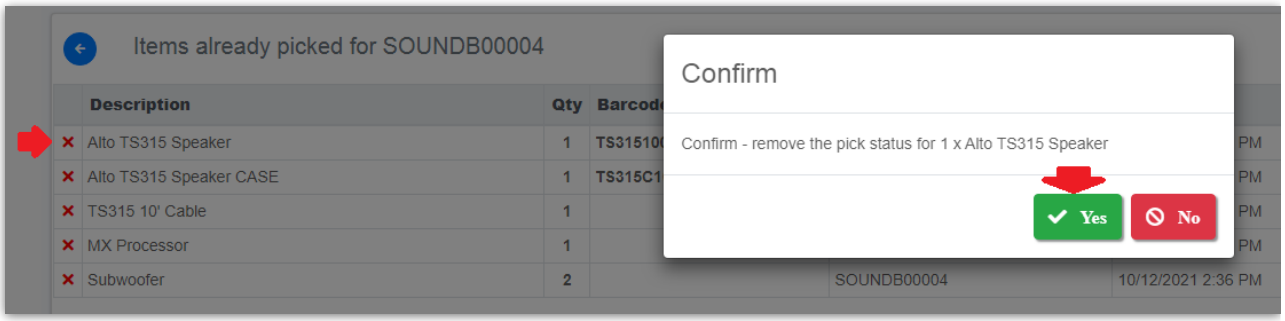
Below, the  shows that an extra asset has been scanned. Simply click the  to remove/undo the scan for that item



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



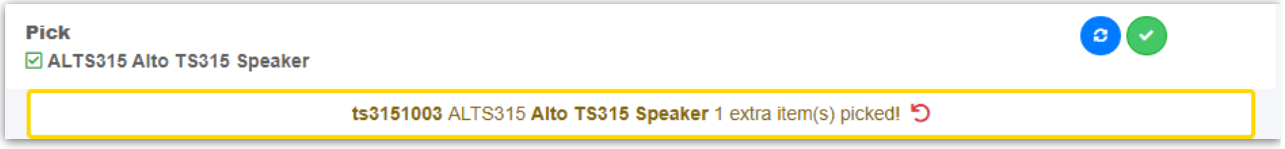
Then click the x to the left of the item to remove and confirm



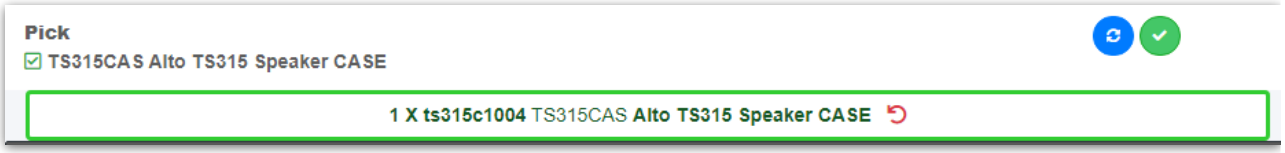
The Message Board

Errors and warnings show up colour coded as follows

WARNING

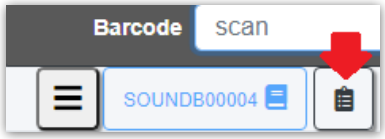


SUCCESS



ERROR

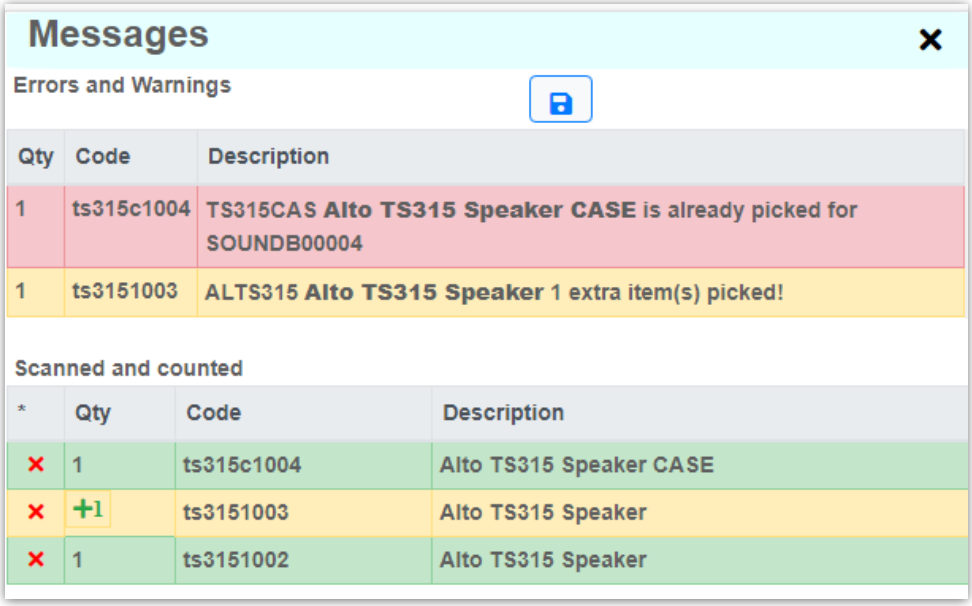


Access the Message Board using the 

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



List Information

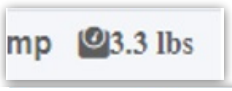
Extra information may appear beside the item description as below:



Item is assigned to a cross rental/sub hire



Line is short by number indicated



Item unit weight



Bin location of Item



Item is direct transferred from specified booking



Quick turnaround coming from the specified booking



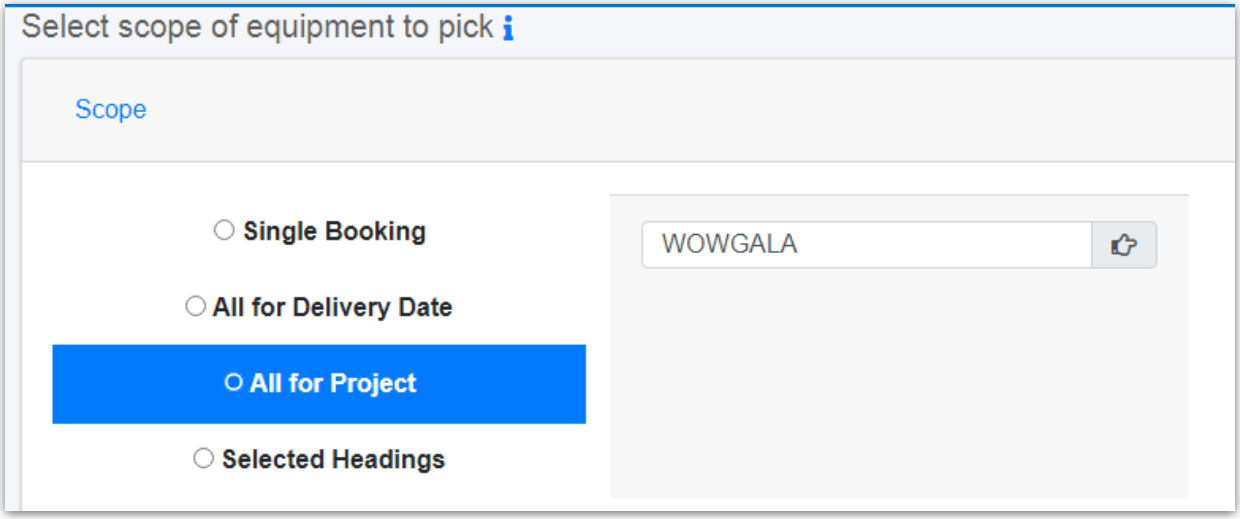
Item is in a rack



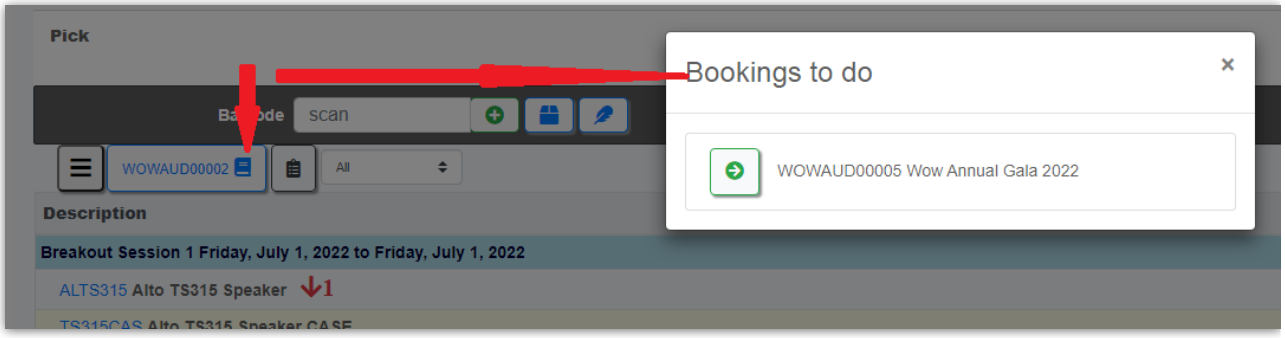
Item is being transferred from another warehouse location

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

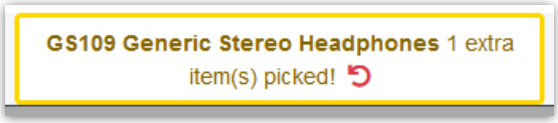


Move between the Bookings within the scope by clicking the current booking. This will show a list of other bookings available for picking. Select any booking in the list to load the equipment list for that booking based on the initial scope.

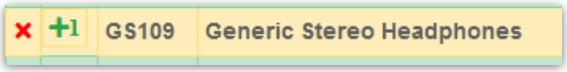


Additional Equipment

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"***



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

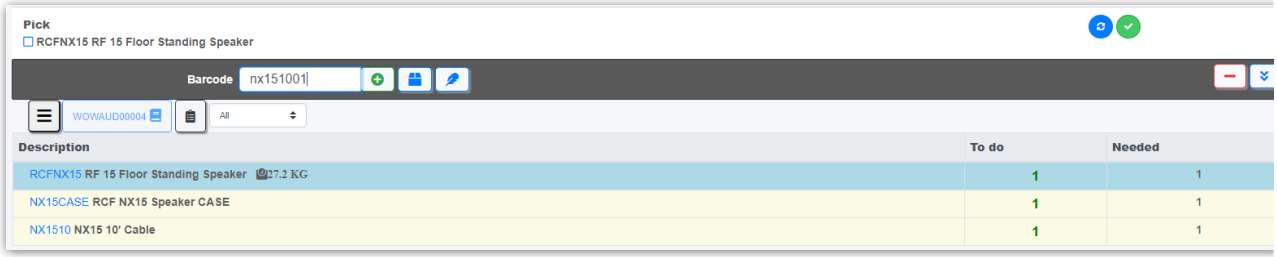


NOTE: *While picked for the booking, additional items scanned at the pick stage do NOT add items to the actual booking at this point.*

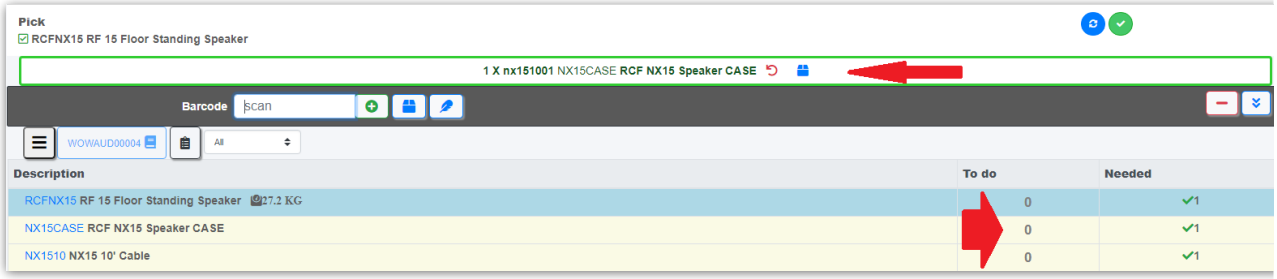
Picked items will be added to the booking at time of checkout.

Pick a Road Case/Rack

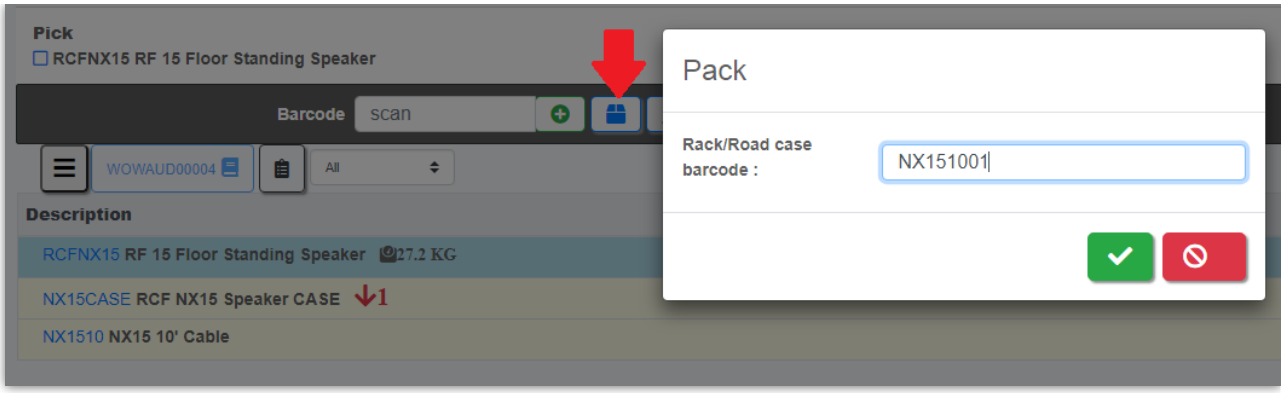
Road cases/ racks are picked in the same way as other equipment. Simply scan the barcode of the road case/rack item.

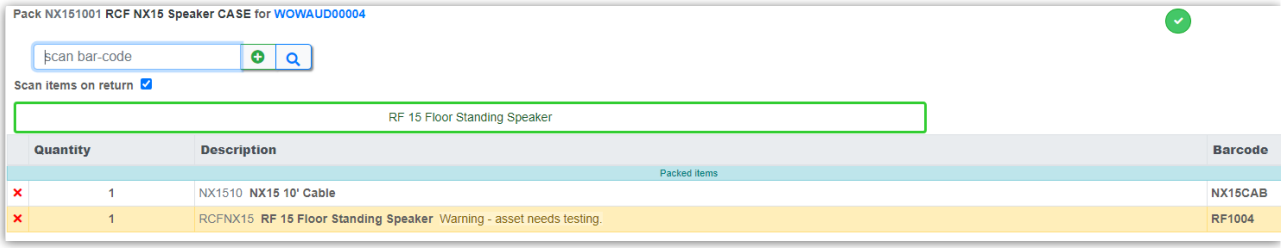


All items registered in RentalPoint as currently packed in the rack/road case will be picked when the rack/road case is picked.



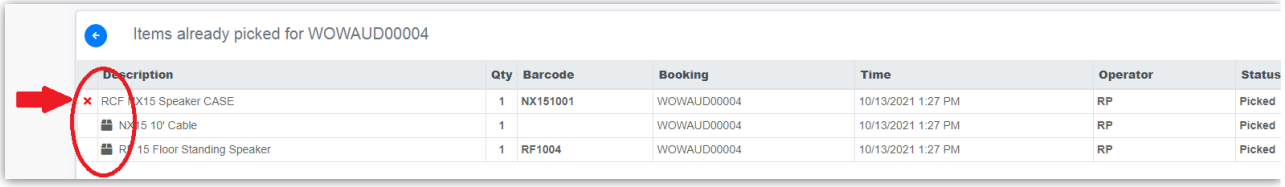
Unpacked Racks/Cases can be packed from the Pick window using the  icon





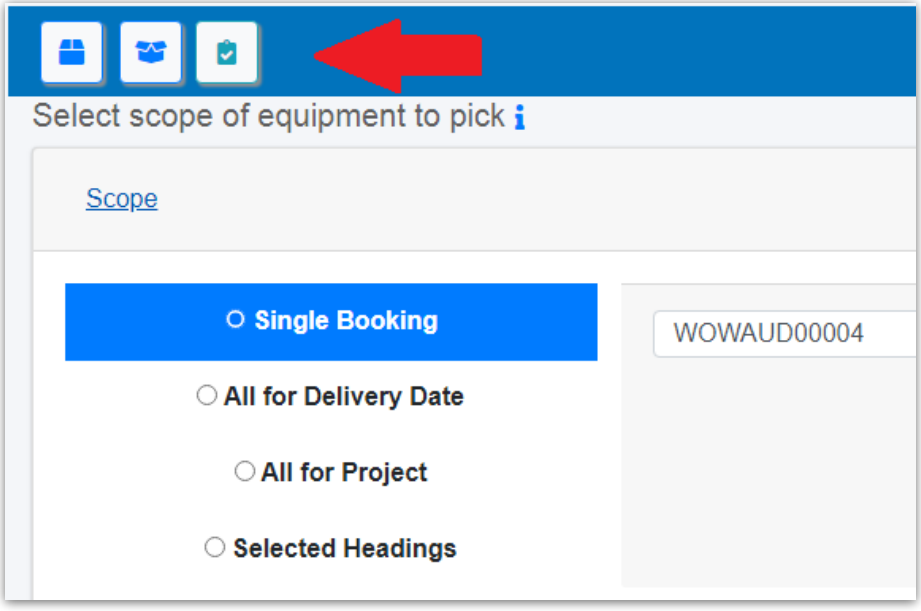
The packed case is picked once saved using the  **icon.** Again all items in the case are picked when the case is picked

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



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.

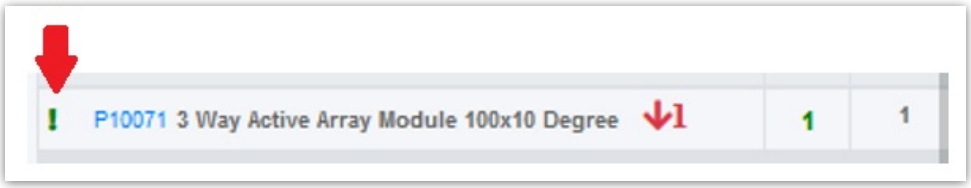


Refresh the Pick List

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

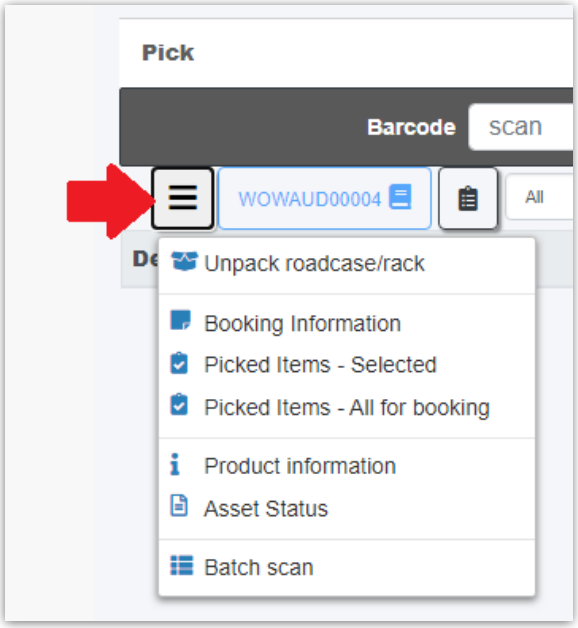
Operators can manually refresh the list by clicking the  refresh icon at the top of the page. The refreshed display will reflect 'picks' made by other operators.

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



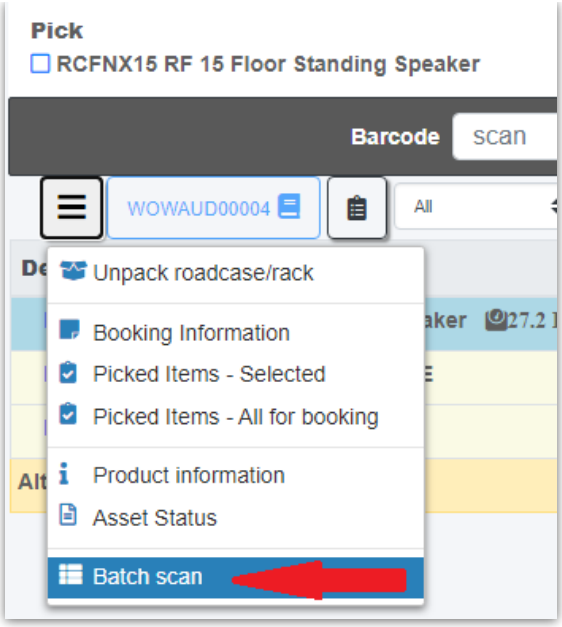
Additional Options

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

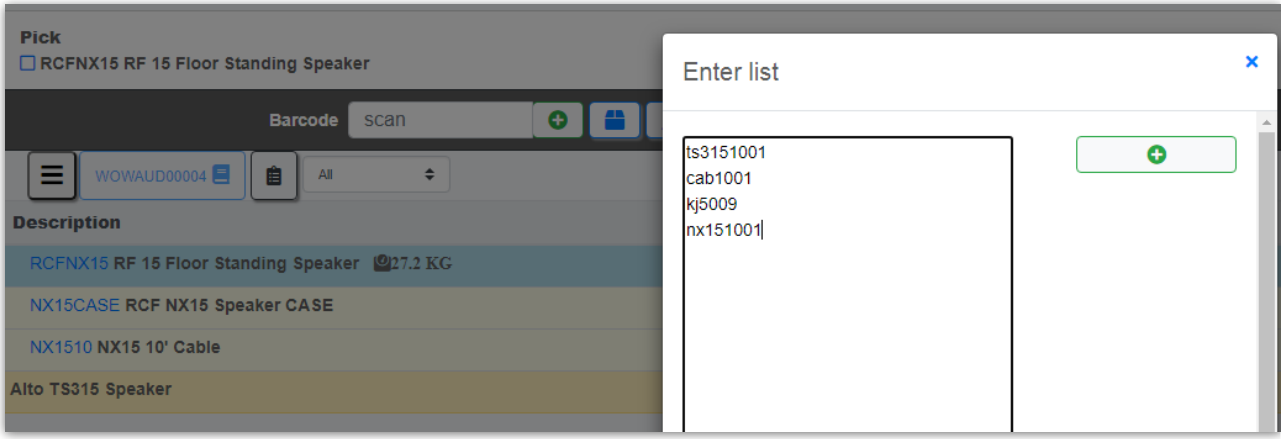


Batch Scan

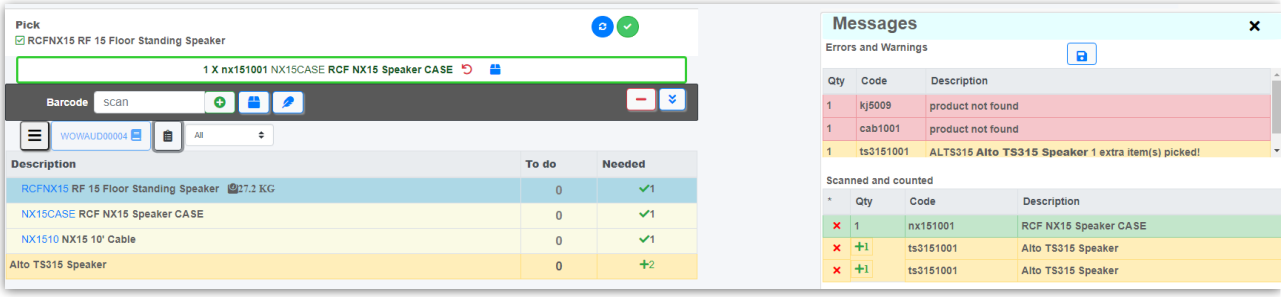
Open the 'Batch Scan' option to scan multiple items without moving through the pick list



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

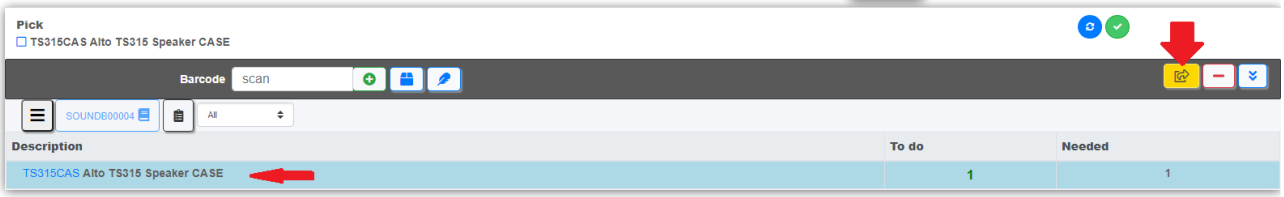


Substitutions

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.

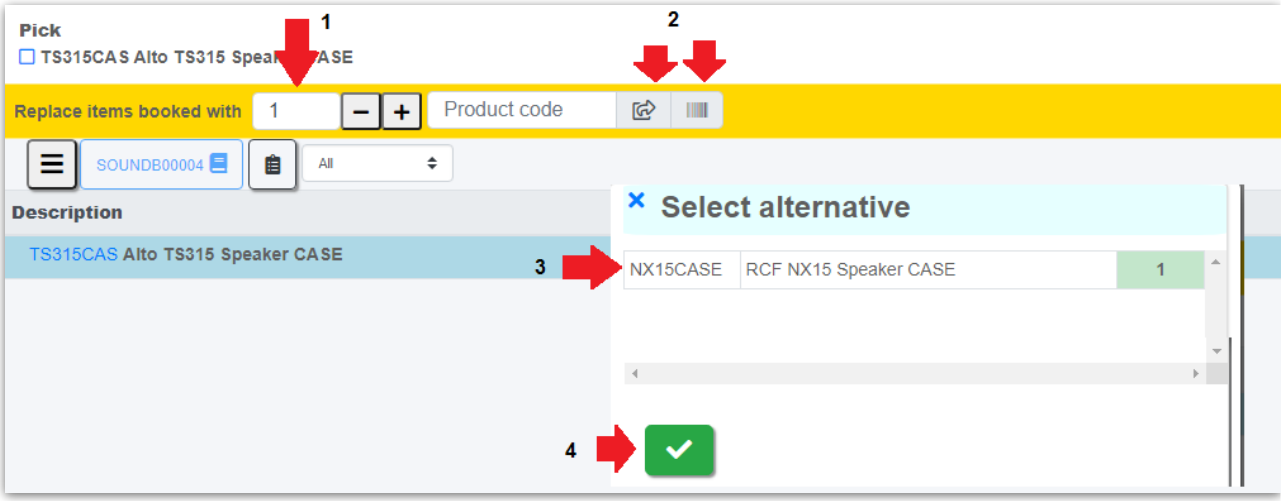
Operators must have the "Resolve Discrepancy" Operator privilege in order to see the substitutions option in the Pick window

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

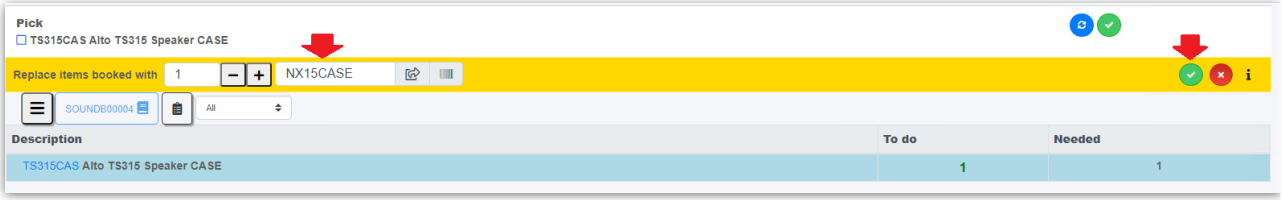


The action bar will be replaced with the yellow substitute bar (see screenshot below):

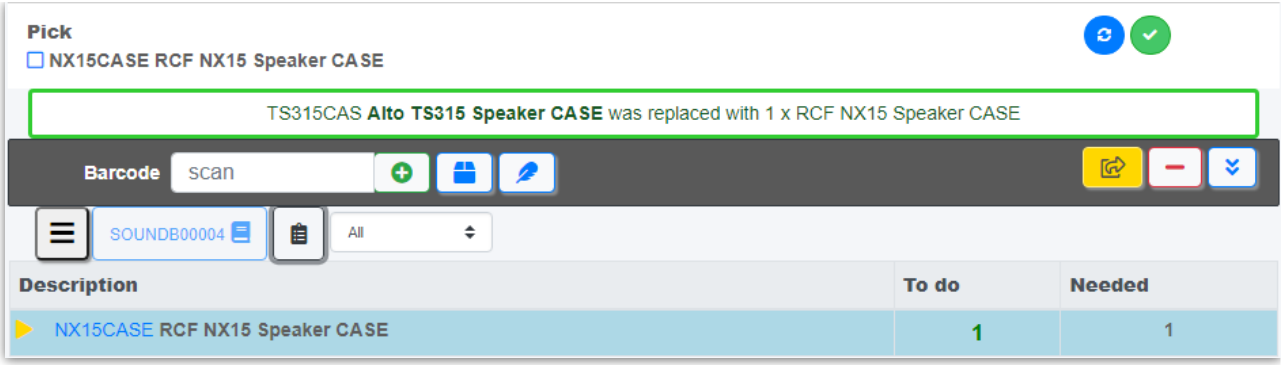
1. Select the quantity on the line that should be replaced
2. Enter the product:
    1. either by pressing  to select from a list of alternatives
    2. or by pressing  and scanning the barcode of the item to be selected.
3. Select the alternative item from the list (*when selecting from a list of alternatives the current availability of each item appears beside the description)*
4. Click to  commit or  to cancel the selection



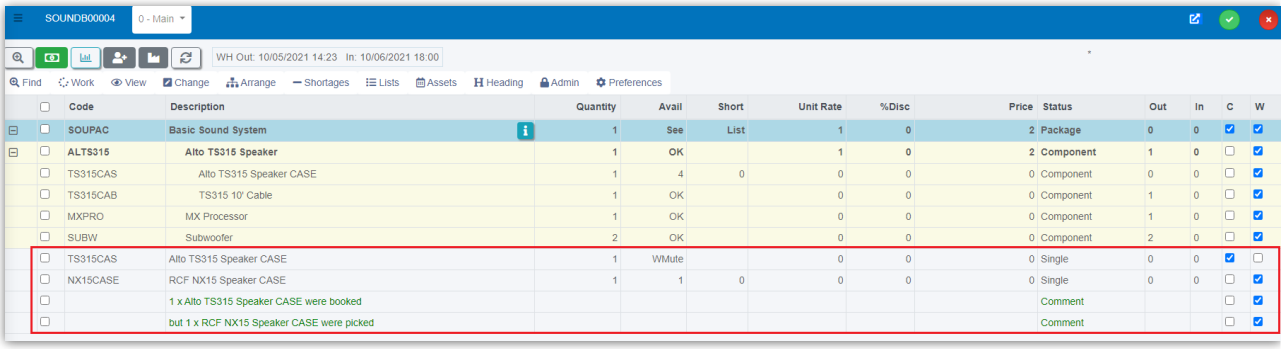
Once the substitute item has been selected, click  to save or  to cancel the substitution



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

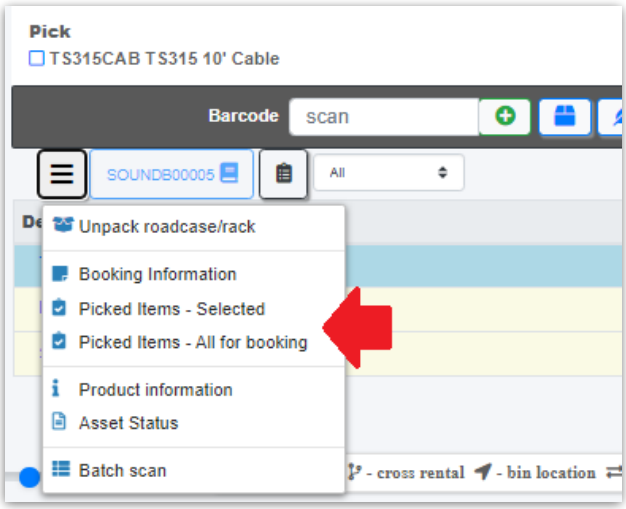


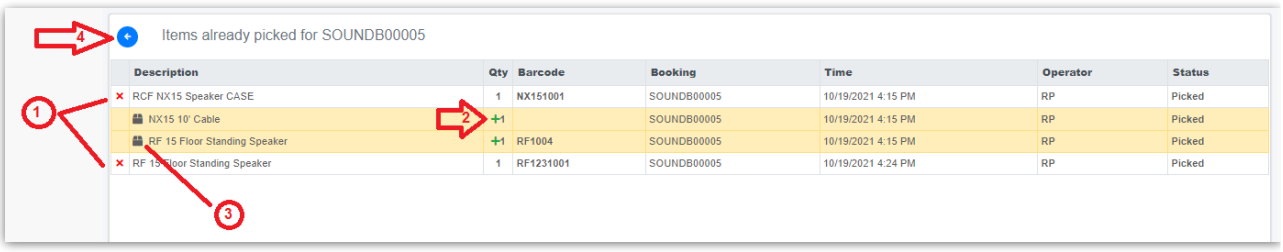
Here's how the substitution shows in the booking



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.



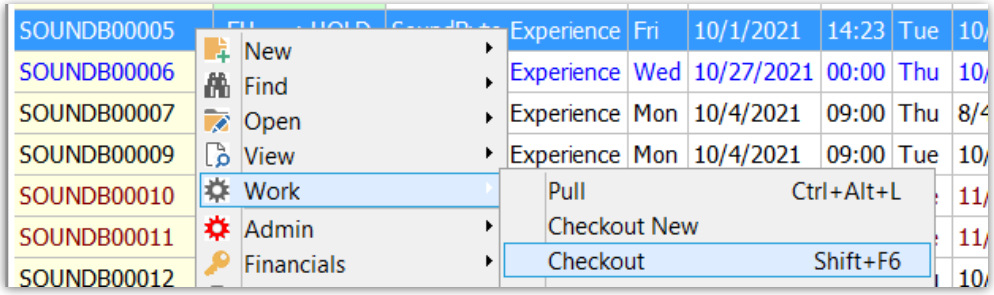


1. Click  to remove picked items from the list

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

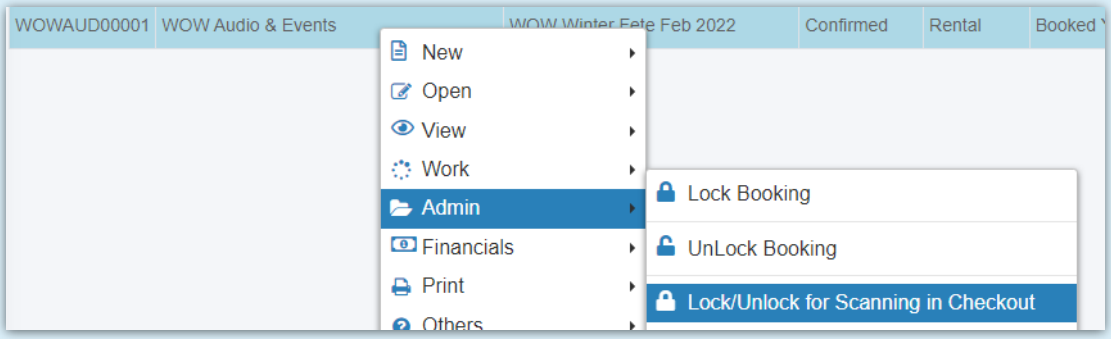
Warehouse prep sessions can be loaded into the checkout window in **RentalPoint Desktop** so that items don't need to be re-scanned before loading.

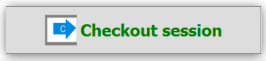


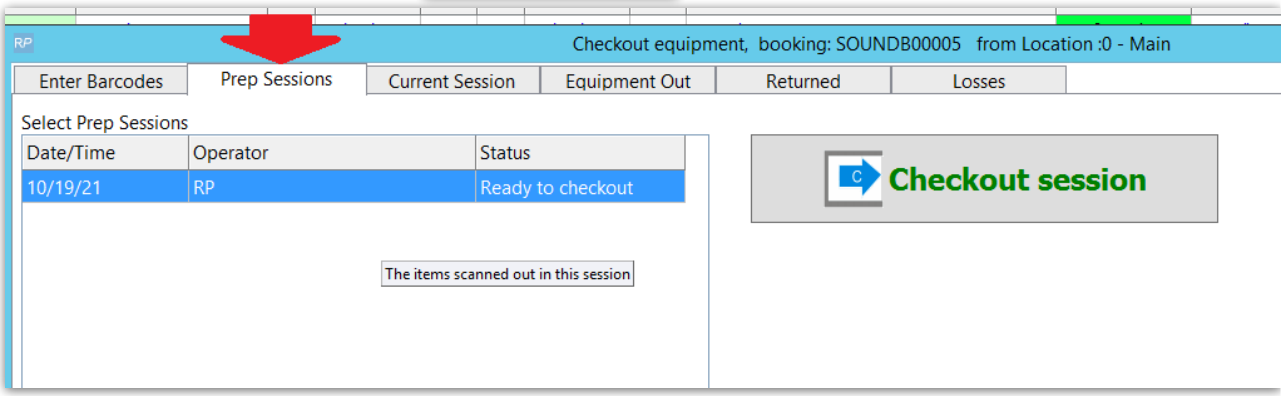
In the Checkout window click on the **Prep Sessions** tab.

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)

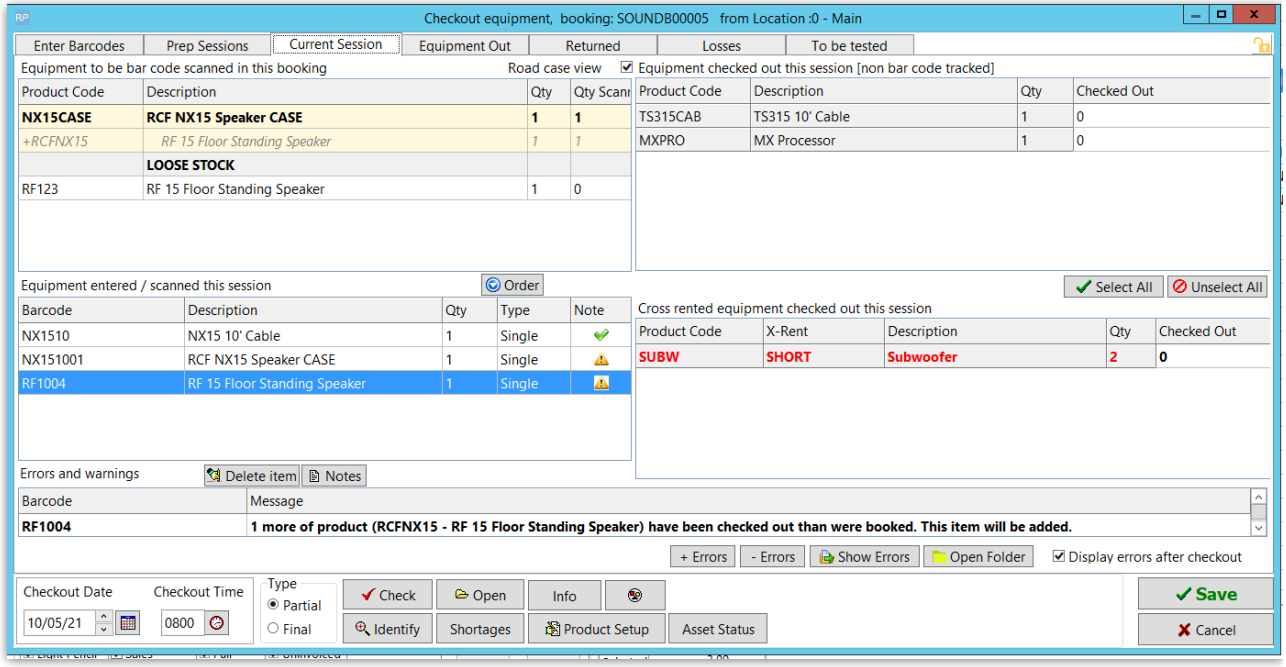


Select the session to check out, then click 



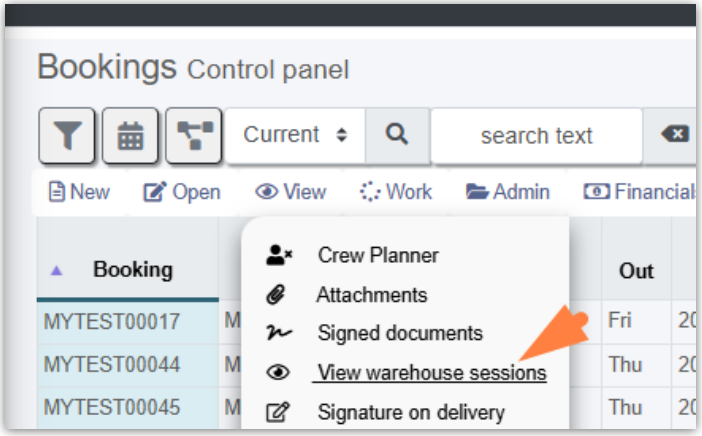
All the assets, non-tracked items and cross rented/sub hired equipment in the prep session will be loaded. Any errors found in the session will be listed in the Errors and warnings window.

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

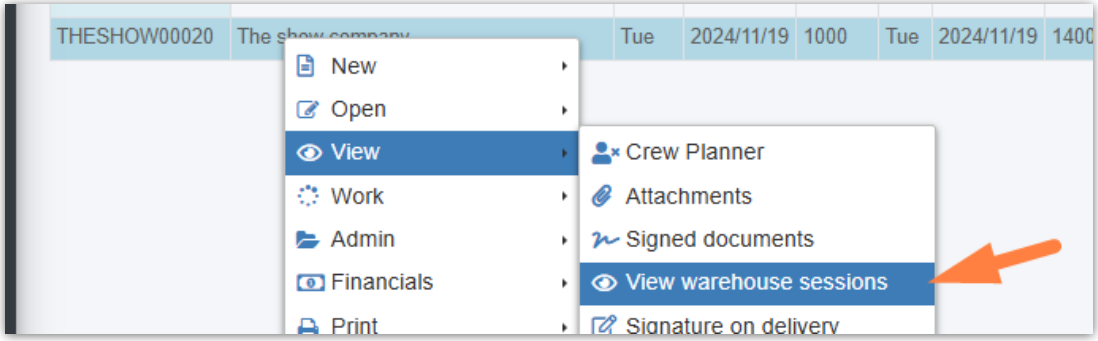


View Warehouse Sessions

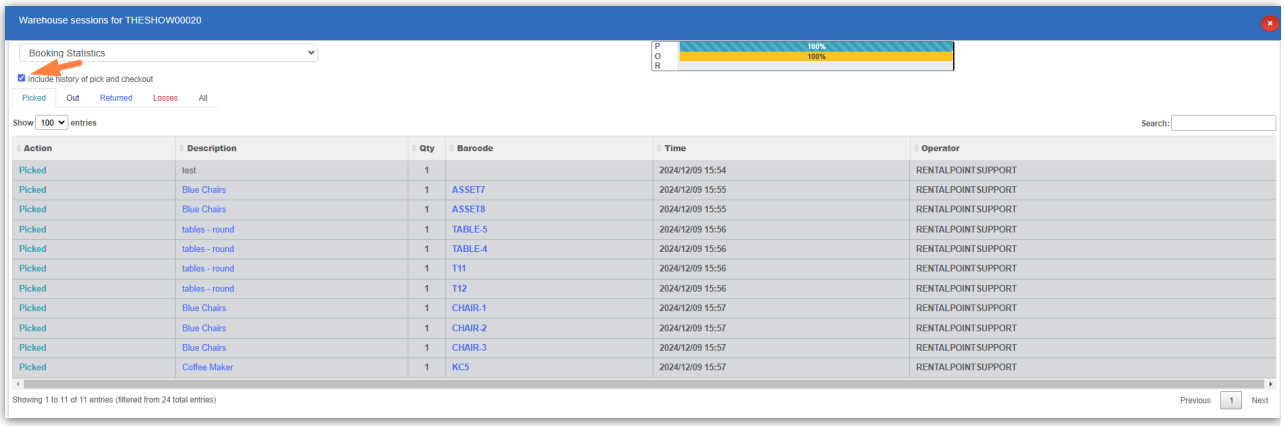
Access from the top menu

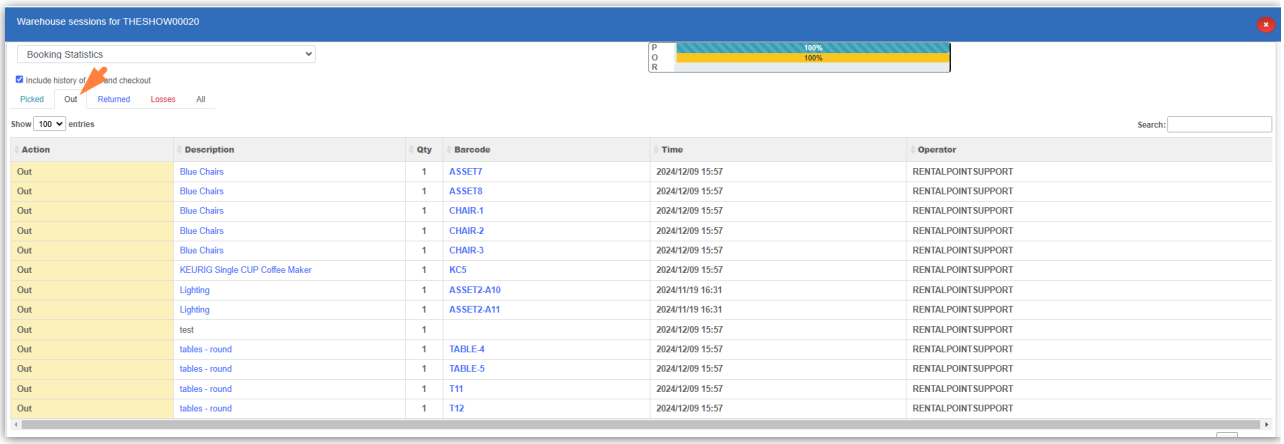


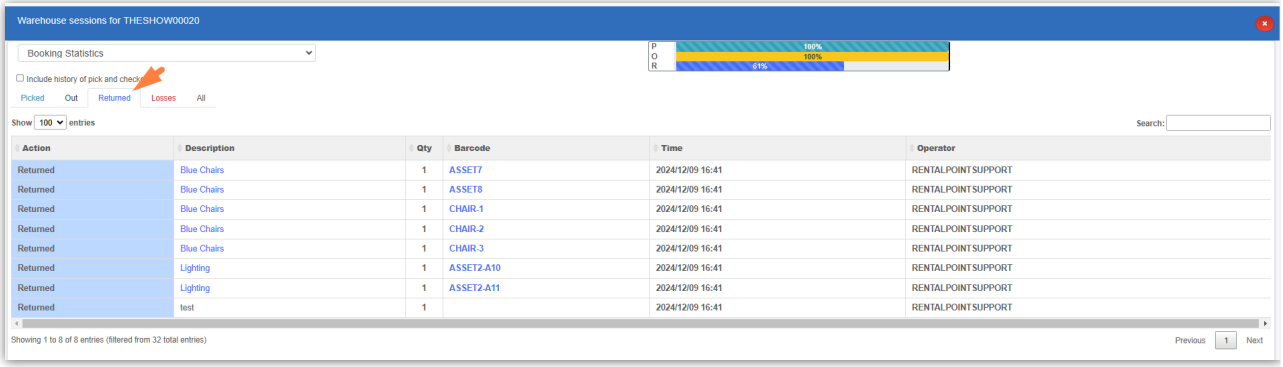
Or the right click menu



- Click 'include history' to see previously picked or checked out items that have now been returned or processed as a loss
- Uncheck 'include history' to see only items that are currently in the status of that status on the booking

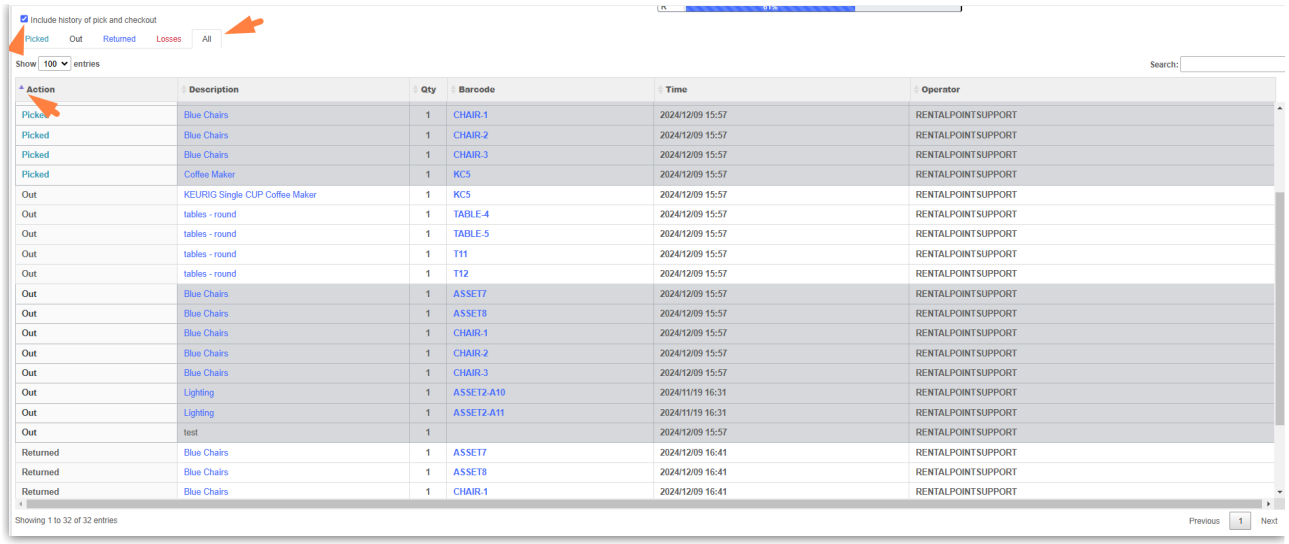






- See both Picked and Checked out information under the 'All' tab

- Use the sort arrows beside each field header to change the sort order


Include history of pick and checkout
Picked
Out
Returned
Losses
All
Show 100 entries
Search:
Action
Description
Qty
Barcode
Time
Operator
Picked Blue Chairs 1 CHAIR-1 2024/12/09 15:57 RENTALPOINTSUPPORT
Picked Blue Chairs 1 CHAIR-2 2024/12/09 15:57 RENTALPOINTSUPPORT
Picked Blue Chairs 1 CHAIR-3 2024/12/09 15:57 RENTALPOINTSUPPORT
Picked Coffee Maker 1 KC5 2024/12/09 15:57 RENTALPOINTSUPPORT
Out KEURIG Single CUP Coffee Maker 1 KC5 2024/12/09 15:57 RENTALPOINTSUPPORT
Out tables - round 1 TABLE-4 2024/12/09 15:57 RENTALPOINTSUPPORT
Out tables - round 1 TABLE-5 2024/12/09 15:57 RENTALPOINTSUPPORT
Out tables - round 1 T11 2024/12/09 15:57 RENTALPOINTSUPPORT
Out tables - round 1 T12 2024/12/09 15:57 RENTALPOINTSUPPORT
Out Blue Chairs 1 ASSET7 2024/12/09 15:57 RENTALPOINTSUPPORT
Out Blue Chairs 1 ASSET8 2024/12/09 15:57 RENTALPOINTSUPPORT
Out Blue Chairs 1 CHAIR-1 2024/12/09 15:57 RENTALPOINTSUPPORT
Out Blue Chairs 1 CHAIR-2 2024/12/09 15:57 RENTALPOINTSUPPORT
Out Blue Chairs 1 CHAIR-3 2024/12/09 15:57 RENTALPOINTSUPPORT
Out Lighting 1 ASSET2-A10 2024/11/19 16:31 RENTALPOINTSUPPORT
Out Lighting 1 ASSET2-A11 2024/11/19 16:31 RENTALPOINTSUPPORT
Out test 1 2024/12/09 15:57 RENTALPOINTSUPPORT
Returned Blue Chairs 1 ASSET7 2024/12/09 16:41 RENTALPOINTSUPPORT
Returned Blue Chairs 1 ASSET8 2024/12/09 16:41 RENTALPOINTSUPPORT
Returned Blue Chairs 1 CHAIR-1 2024/12/09 16:41 RENTALPOINTSUPPORT
Showing 1 to 32 of 32 entries
Previous
1
Next