# The Setup Menu

Last Modified on 01/09/2026 10:25 am EDT

Key information used throughout RentalPoint set up and/or maintained from one convenient menu location.

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# Set Up Tax Authorities

## Tax Authorities Defined

RentalPoint is capable of storing several different taxes that can be used when a business has a wide operating area. There are times when bookings are created in another branch that can be in another area of the country or even in a completely different country. For this reason there may be a need to store multiple tax types that can be applied to bookings and sales. Creating and editing taxes in RentalPoint can be done via the Tax Authorities option in the setup menu.

## Parameters Used in Conjunction with Tax Authorities

| Parameter | Function |
|---|---|
| Pricing #34 | Set this parameter to let RentalPoint know the price you would like to charge tax on |
| Pricing #41 | Set this parameter to let RentalPoint know if settlement discount should be taxed |
| Pricing #45 | Set this parameter to let RentalPoint know if taxes should be rounded up or down |
| Operational # 74 | Set this parameter to tell RentalPoint to use either Location Record Tax defaults OR the defaults as set up in the Tax Authority Table ***in each Customer Record*** |
| Operational #133 | Set this parameter to tell RentalPoint to display the Tax Authorities in NAME or NUMBER order for any drop down list of Tax Authorities |
| Operational # 134 | Set this parameter to tell RentalPoint to use either Customer Record Tax defaults OR Location Record Tax Defaults ***in a booking*** |
| Operational #164 | Set this parameter to tell RentalPoint to load Vendor Tax Defaults on a PO |
| Operational #165 | Set this parameter to tell RentalPoint to display tax fields on a PO |
| Operational #169 | Set this parameter to tell RentalPoint to display tax fields in Vendor Properties |

## Operator Privileges Affecting Tax Authorities

Edit the GROUP record the operator belongs to and check out figure 1.1 and 1.2 below for more details.

Fig 1.1

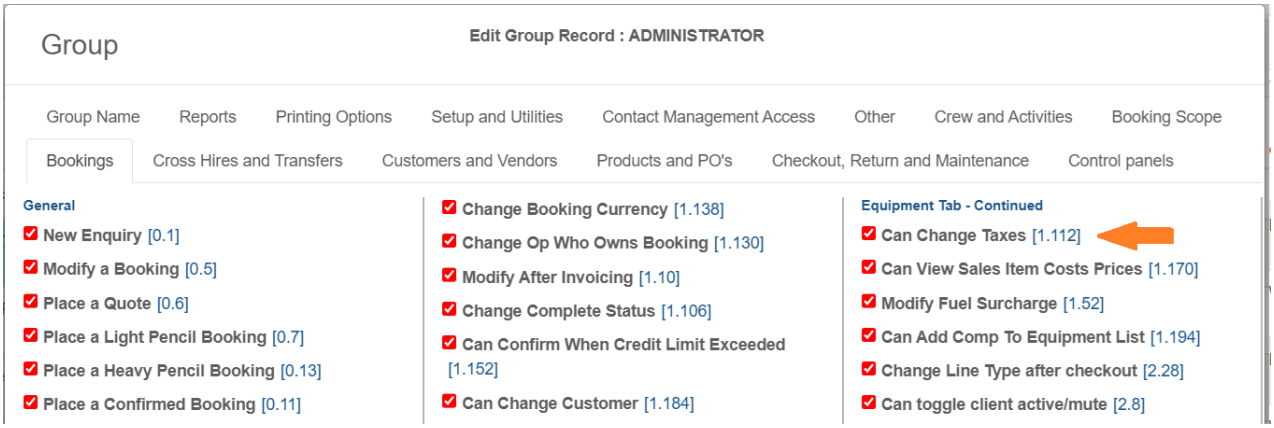
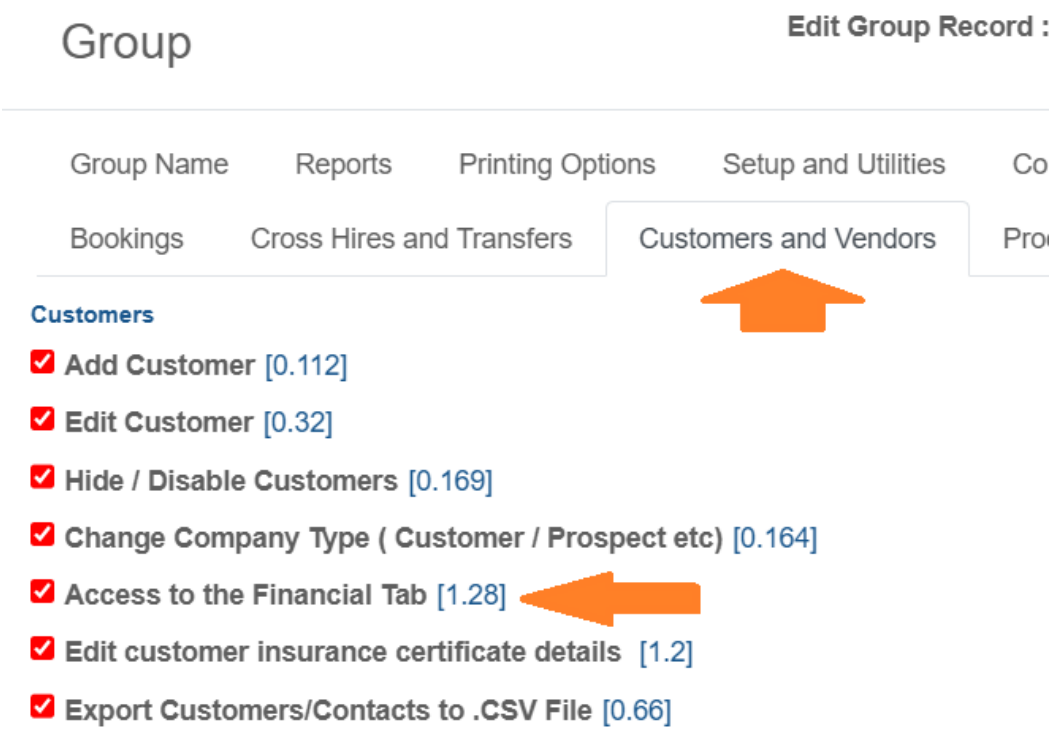



Fig 1.2




## Adding / Editing Tax Authorities

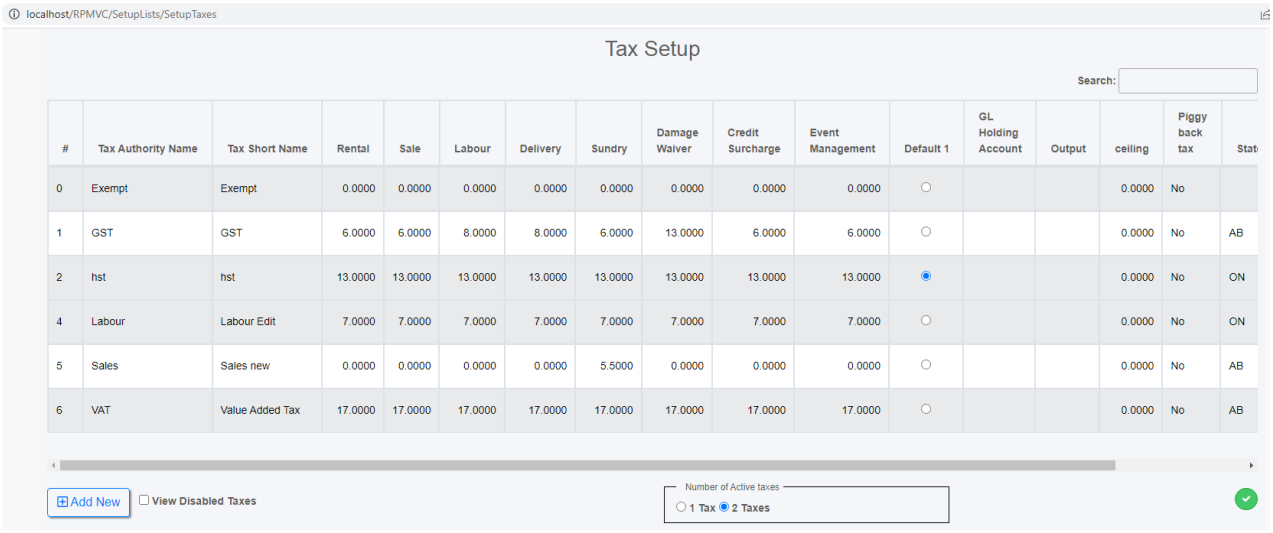
*To enter a new tax click **Add New** and a new tax row will display in the list. The tax can now be configured to specifications.*

*When editing a tax authority, RentalPoint will not overwrite the existing tax authority. The existing tax will be disabled and the system will enter a new one. This ensures that all existing transactions (ie. bookings, invoices etc) will maintain their original tax percentage;*

*Existing Bookings will not be automatically recalculated to reflect the new percentage you have added. All*

*new transactions however will use the new rate.*

*Fig 1.3*




To adjust a tax that was previously disabled, click the '**View disabled taxes**' option on the bottom left of the screen.

- The '**Ceiling**' column is the dollar limit the tax stops at. For example, if you have a booking for $150 and the ceiling is set at $100, the customer is only charged tax on the first $100 and not the remaining $50. The ceiling limit is applied on the total invoice value. By default, a zero is loaded into the ceiling column denoting that the entire amount should be taxed.
- A '**Piggy Back**' tax is a tax that is charged on top of another tax.

## Default Tax Authorities

RentalPoint allows you to setup default taxes for Customer Record, Location or Tax Authority Setup. Once set up the defaults used are dependent on the parameter settings *see parameters used in conjunction with tax authorities in section 2 above for more information*

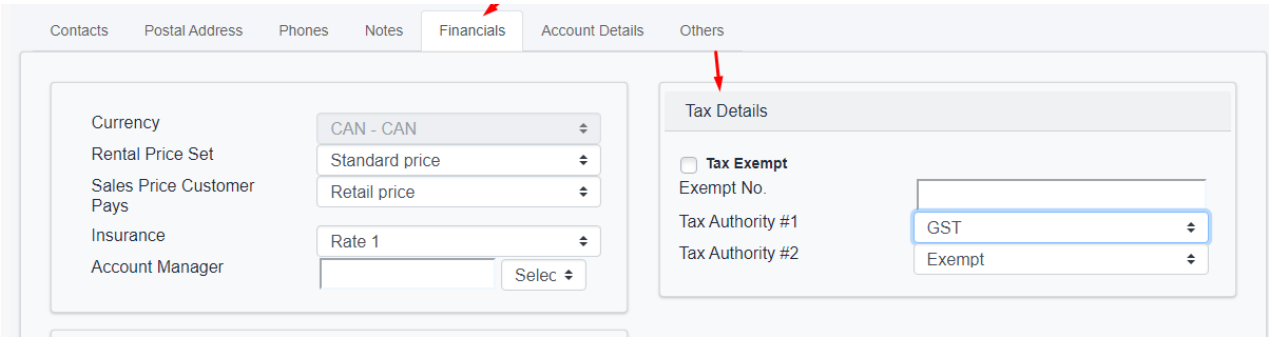
**In Tax Authority Set Up**

To set a default select the desired line in the grid and click **Tax #1 Default.** To set a second default select a different line and click **Tax #2 Default ,** *see figure 1.3 above*

You can also select the same tax line as both tax 1 and tax 2 default, i.e. if you want to have exempt as the default for both taxes.

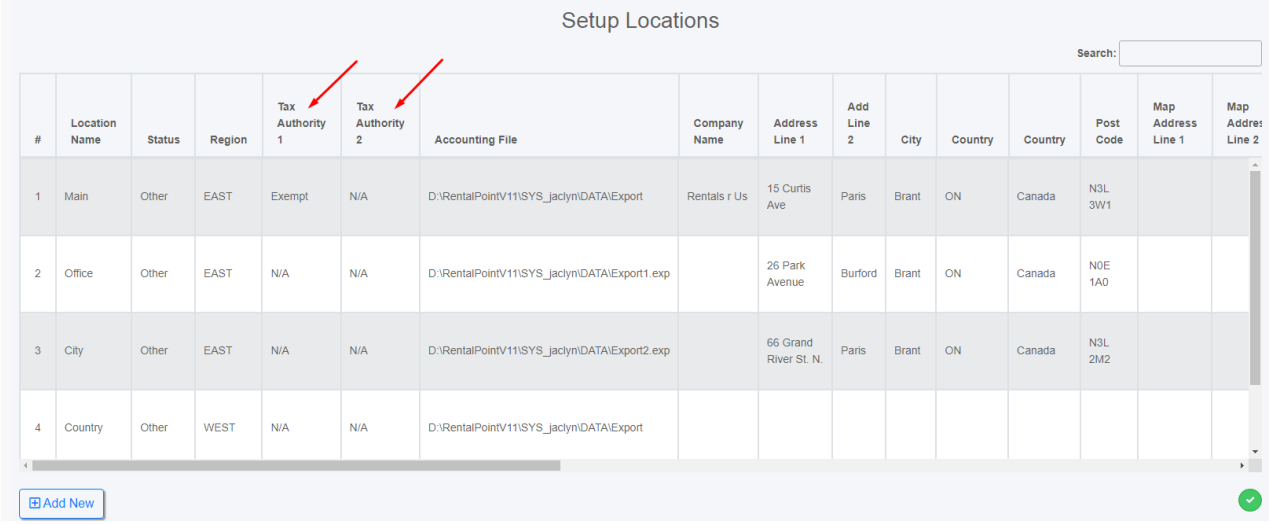
**In Customer Setup**

Access default customer/vendor taxes on the 'financials' tab




**In Location Setup for Multi Location Systems**

For multi-location systems default taxes can also be set for each location, tusing the  Set-up > Locations menu option.




# Changing Default Tax Authorities

Changing default tax authorities is a two step process.  You must set up the new tax authority AND set it in place of your old default.  The changes here will depend on how you set your defaults above (i.e. by Tax Authority Setup, Location, Customer, Vendor).  The new tax authority will be reflected on all NEW bookings.  It will NOT affect current bookings unless you edit the booking and change the tax authorities.

**Steps to Change Tax Authority**

1. Disable the old tax authority in the setup->tax authorities table
2. Create new tax authority
3. Set the new tax authority as default1
4. Update each customer record/location record with the new default tax authorities.
5. In order to change all customers/Locations you need to manually enter each customer record to update the default tax authorities OR import the new defaults from an excel file

**Update Customer Records with New Default Tax Authority via Export/Import**

1. Take a backup of your database first
2. Export your Customer table to an excel file (via others, import/export, export customers), under the fields tab choose customer name, organization, tax authority 1 and tax authority 2), save the file with a .csv extension

3. Edit the excel file produced For the Tax Authority fields
4. Enter the NUMBER of the NEW tax authority as set up in the 'setup tax authorities' option
5. Save as a .csv file
6. In RentalPoint via the 'others' tab import file, customer, and match the fields in your excel file to the fields you want to update in the customer table.

If you have an IT person on staff they should be able to do this for you, however if you need help please feel free to email support@rentp.com

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# Multi Location Setup

## What is the Multi Location Module?

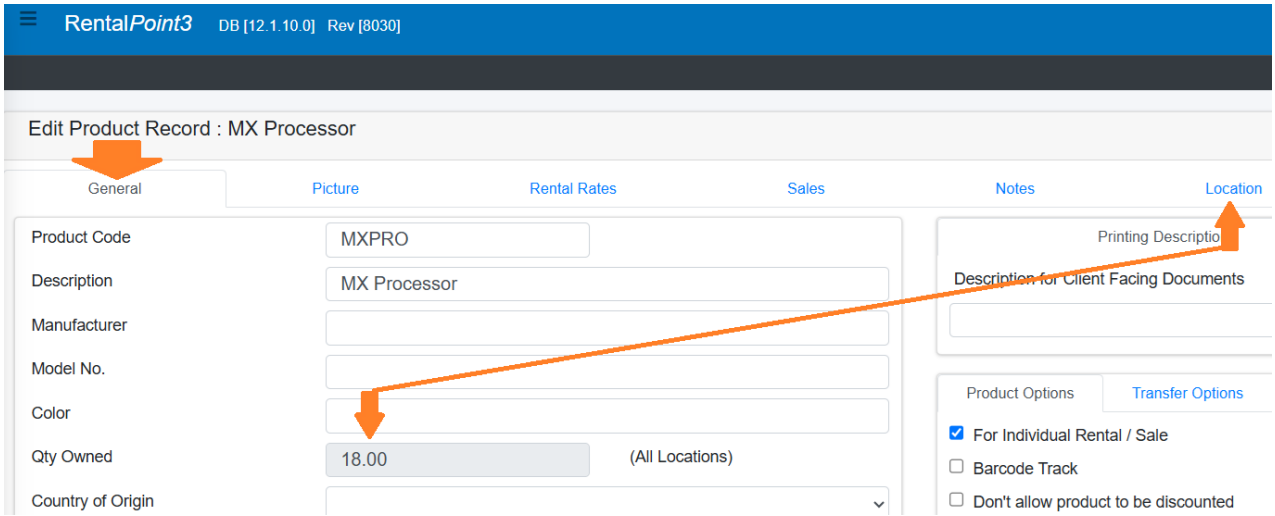
The RentalPoint multi location module is an additional module that may be purchased separately from your main software package. The module allows you to manage your inventory at multiple warehouse locations with the ability to transfer inventory between locations.

You'll need to upgrade your license to avail of multi-location features, please contact support@rentp.com for more information.

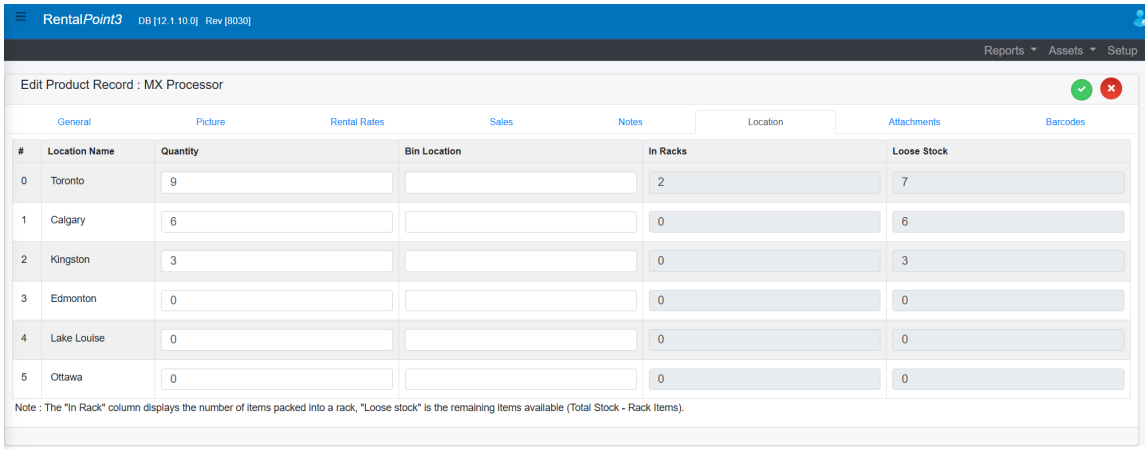
## Using Multi-Locations in RentalPoint

When using a RentalPoint Multi-Location license, most features simply become 'location' aware as outlined below:

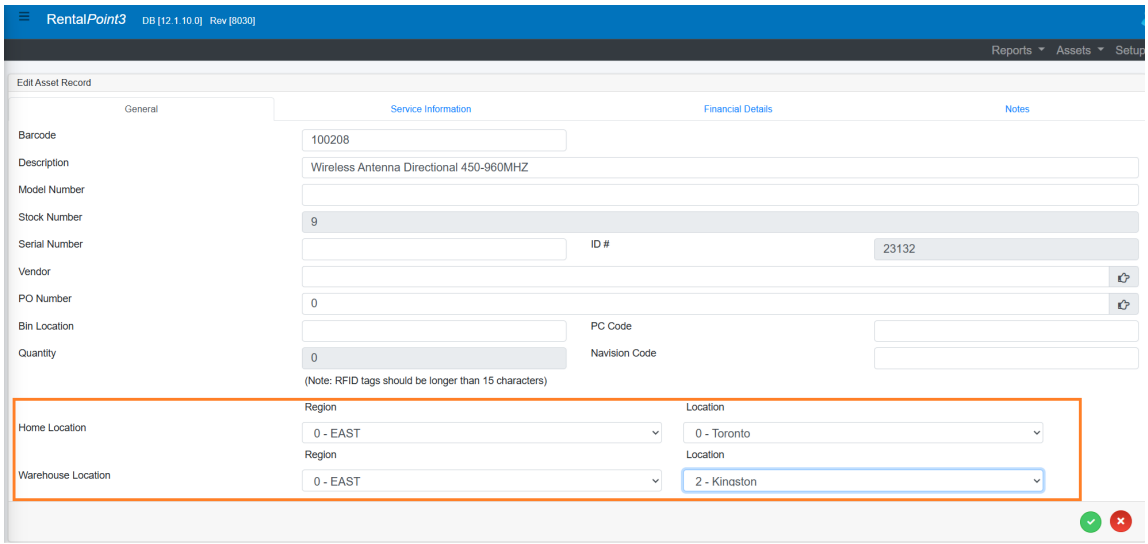
- On all multi-location systems, location 0 is your main location which is usually your current main office. Regions can also be used to further organize locations.
- Each user record has a default location (per settings in their operator record), so that on login the system is set to display the bookings at the default location assigned.  Multi-location security is also available, please contact support@rentp.com to avail of these options in user setup.
- Inventory/Equipment becomes 'location' aware
    - The Qty Owned field once you have moved to a multi-location system, becomes read only and not editable like it is in your current system. This is because a new 'Location' tab appears and this displays the number of items at each location.



- The location tab, now keeps track of where products are.
  - Figures here can still be updated from one way transfers that may not have been completed yet. On completion of a one way transfer (i.e. check out from source and check in to destination OR archive of transfer booking), the stock qty for the source location is decremented while the stock count for the receiving location is incremented. Until the transfer is completed, it will show up on the running balance for stock movement.
  - Stock packed in racks will also show here




  - An asset record also becomes location aware showing both a 'Home Location' (i.e. ownership), and a Warehouse Location (i.e. current location of the asset)



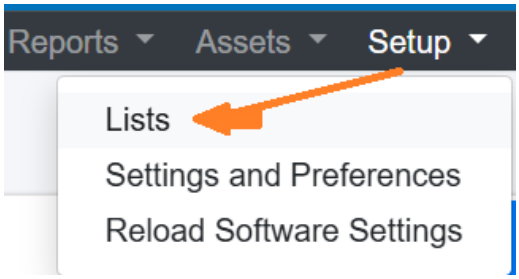

## What's the difference between a Location and a Region?

Depending on your company workflow, locations may be organized into regions. A region is not an actual physical entity, but rather a grouping of locations; it does not hold any inventory. For example, your company may have three warehouses in California and two in New York. You can enable regions and group the California warehouses into one region and the New York warehouses into a second region. The multi location module can be run with or without regions.

Regions are enabled via Operational Parameter #174.

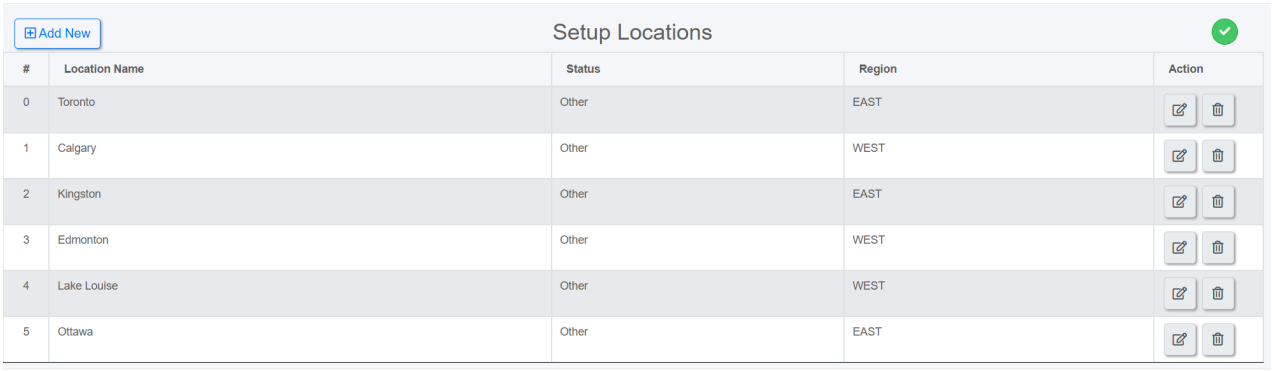
## Locations Setup

The details of all your locations are accessed via**Setup –> Lists-->Locations**.




Once a location is saved in the system, it can be edited but not removed; This ensures that your historical data is maintained. When the multi location module is activated the system creates a default location. You can change any and all details for this location to make the information relevant to your company.

Terminology for location can be changed via Setup --> Settings & Preferences –> Terminology –> General Tab.




| # | Location Name | Status | Region | Action |
|---|---|---|---|---|
| 0 | Toronto | Other | EAST | |
| 1 | Calgary | Other | WEST | |
| 2 | Kingston | Other | EAST | |
| 3 | Edmonton | Other | WEST | |
| 4 | Lake Louise | Other | WEST | |
| 5 | Ottawa | Other | EAST | |

Address Tab

Location Name The name used within the software (ie. drop down lists, internal reports etc.).

Company Name The name used on client facing documents (ie. Invoice).

Company Number Tax number used on client facing documents (ie. Invoice).

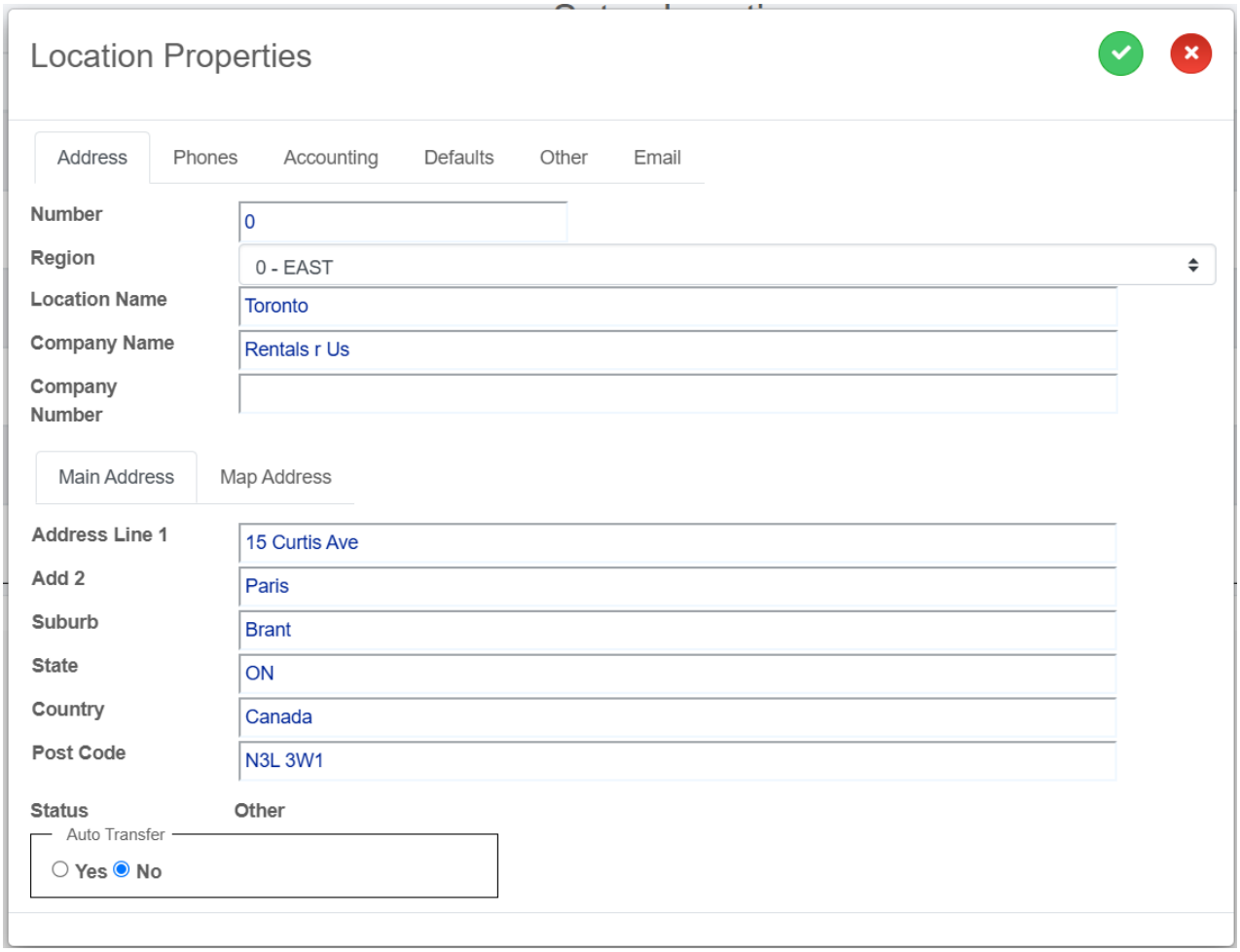
Main Address Also referred to as the billing address.

Map Address The physical location of the building. Used in the Get Directions functionality.

Status This option is only used when **Auto transfer from satellite locations** is enabled. (Setup – Parameters – Transfers).

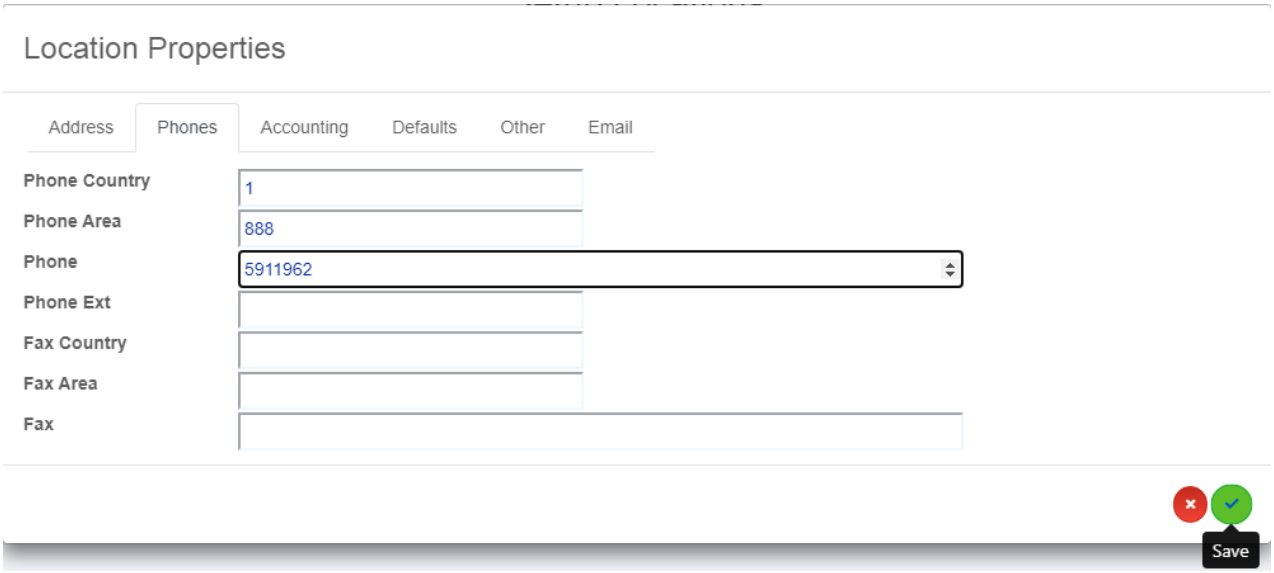
If a satellite location (configured with a Status of **Other**) has a shortage, the system can create a transfer from the **Main** location to the satellite location.

Auto Transfer If the satellite location has a shortage, this setting determines if the stock is automatically transferred from the Main location to the satellite location.




## Phones Tab

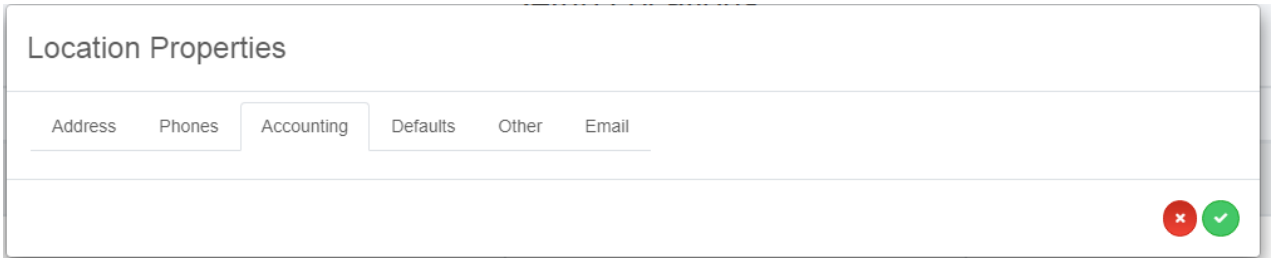
Holds phone numbers for the location




## Accounting Tab

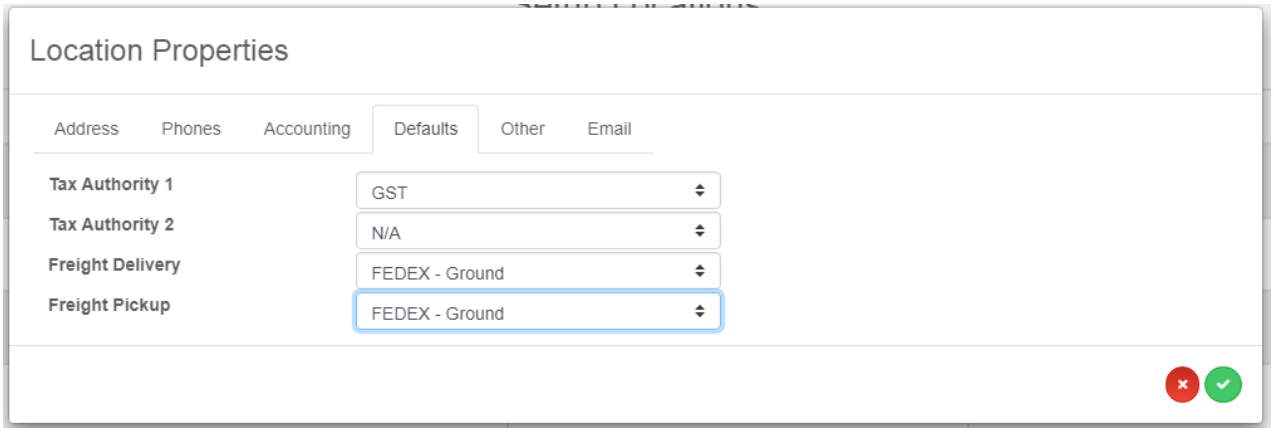
When integrating with an accounting package, this field determines where the transaction file is exported to.

You can configure account integration via Accounts #21.



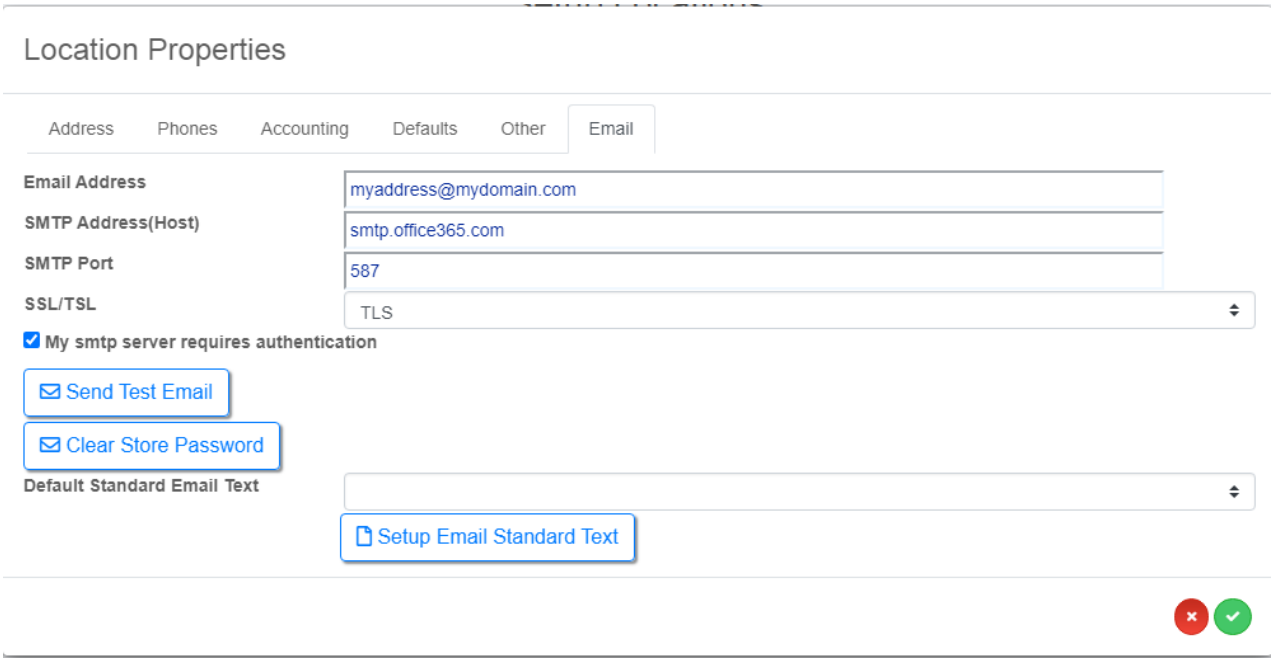

## Defaults Tab

The defaults used when creating a new booking for this location.




## Email Tab

Configure email settings that can be used for your operators.



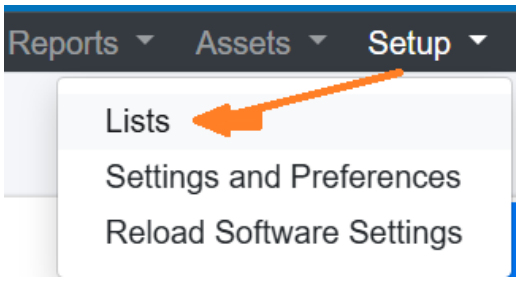
# Regions Setup

Enabling Region Support allows you to manage your locations more effectively. As an example, you have several locations in the Eastern Time Zone, you can group them together within a region.

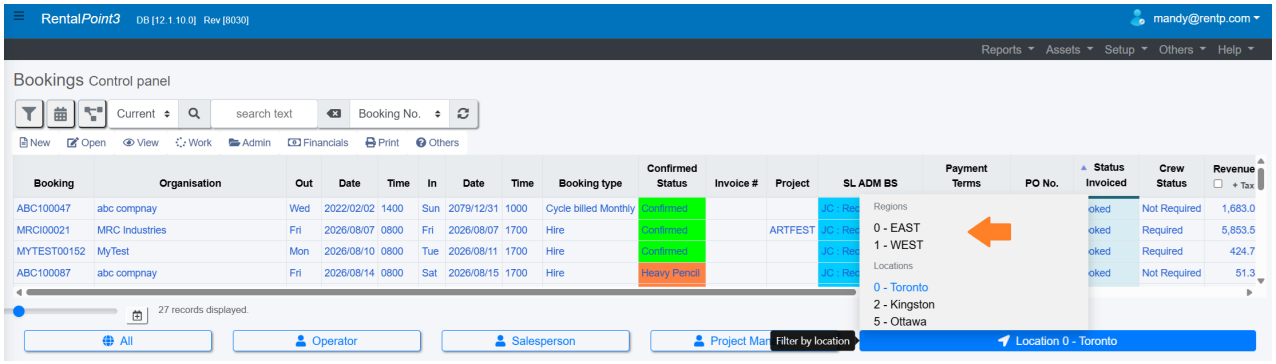
*Enabling Region Support allows you to manage your locations more effectively. As an example, you have several locations in the Eastern Time Zone, you can group them together within a region. (Note: Regions support is only available if you have the multi-location version)*

To use the regions functionality it must first be enabled. Go to the Parameters option of the setup menu. Open Operational #174 - Enable Region Support. Set this to Yes, then Ctrl F5 to update your parameters across RentalPoint.

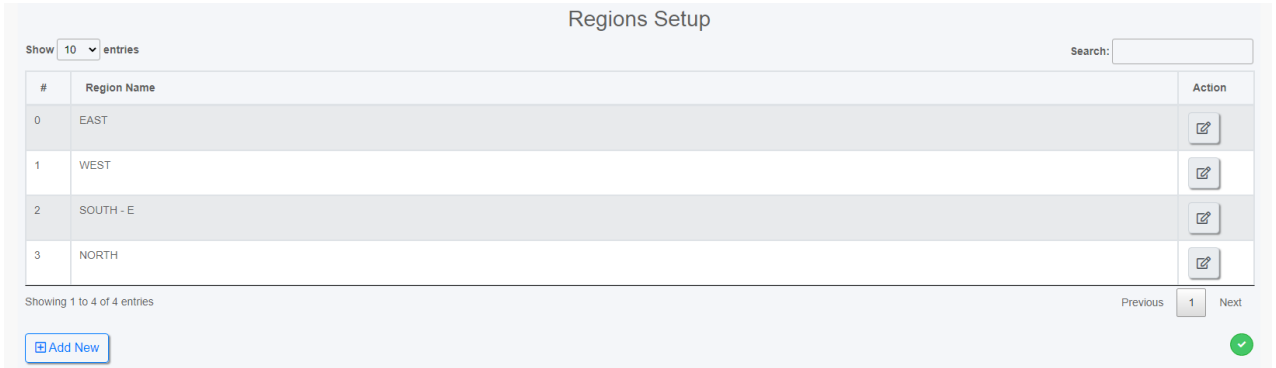
The option for adding regions should now be available from your Setup menu.



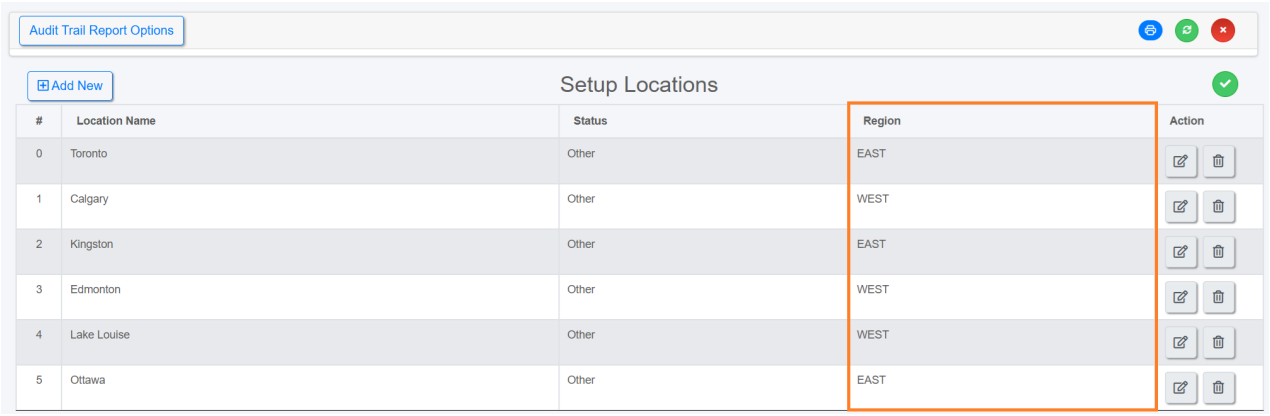

Note also the region scope option at the bottom of the booking grid and on any form that location is available




To configure the regions, select the Regions option from the setup menu. By default the system will create a region for you, you can change the name to make it more descriptive. Once a Region has been added to the system it can be renamed but not deleted.




After entering Regions, go into Setup Locations and assign each of your locations to a Region.




Once a Region has been created, you can rename it but not delete it. Bookings and other information in the system will still be linked to the region for reporting information. **Scope and Searching**

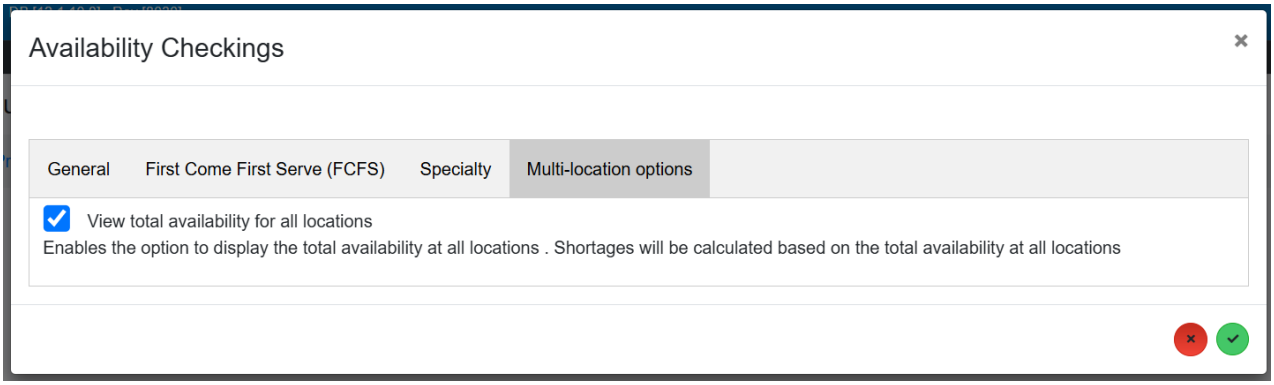
The secondary scope in RentalPoint can also be sorted by regions. If you select a region from the secondary scope, any bookings that are assigned to that region, or to the locations in that region, are displayed. The secondary scope applies to other areas of RentalPoint, including the Shortages List, Products, and Purchase Orders.

When creating a booking, you can select a region from the list. Only the locations associated with that region display in the location drop down list.

**Equipment Availability**

Searching for equipment based on a region is quick and easy. Enabling Operational Parameter #127 – Equipment Search Location Sensitive displays an extra search tab in the equipment grid of the booking. Select the region, then continue entering your equipment as normal. Availability is based on location but the tree view and the search are based on the quantities in the region.

See also Operational Parameter #6 'View total availability for all locations' option




**Technicians**

When entering a technician, the region in which they work can be specified. Then when a booking is created only those technicians that work in the region specified in the booking can be selected.

**Custom Printing**

When printing custom templates throughout the system, you can specify region specific templates. For example, your Eastern region may have different printouts then your Western region. Using the custom printing option, you can easily organize your templates, so the Eastern region does not accidentally use a Western region template.

**Reports**

Several reports in the system, such as the Booking Cross Section, Invoice Register and Revenue Report can be sorted by regions, making accounting duties much more simplified.

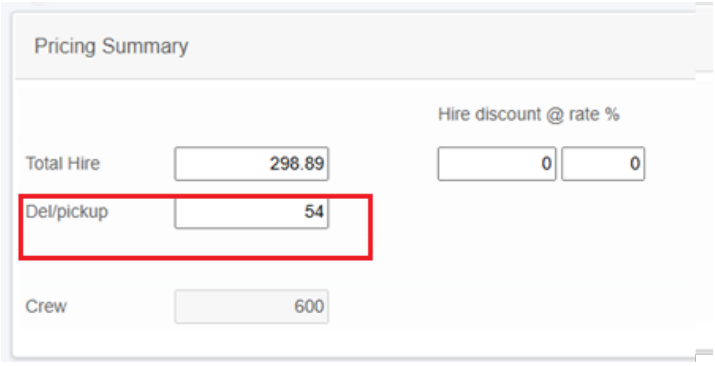
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# Freight

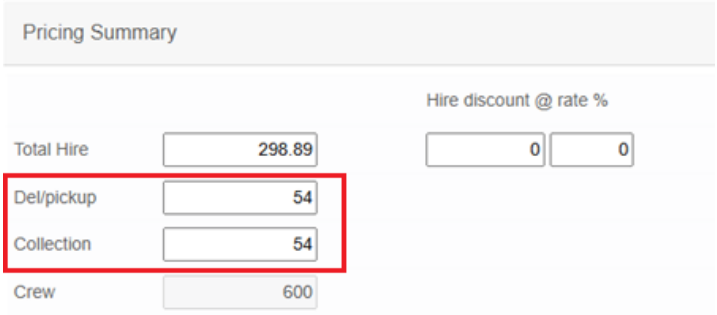
A freight charge covers the cost of delivering and/or collecting equipment. Charges can be based on a fixed rate or calculated using factors such as distance, delivery zone, vehicle type, or weight.

**Pricing Parameter #24** defines how freight is entered on the booking

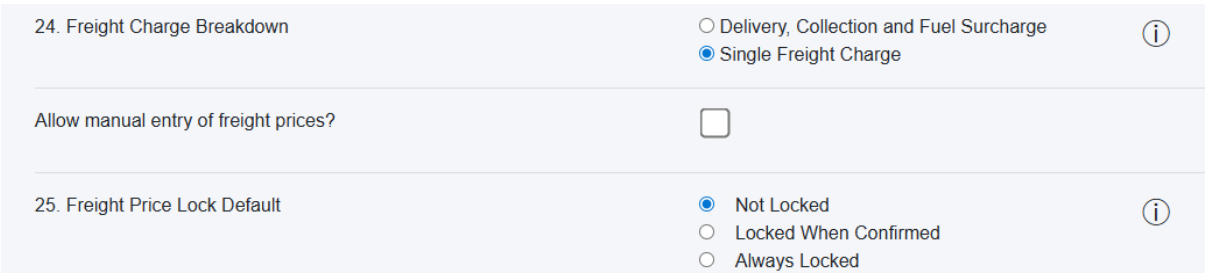
- Single Freight Charge




- Delivery, Collection, Fuel Surcharge (fuel surcharge is across all bookings and is entered when setting the parameter)




- Fuel Surcharge and 'Allow Manual Entry of Freight' preferences are set in the same parameter. Freight can also be locked, left unlocked or only locked when a booking is confirmed via Pricing Parameter #25



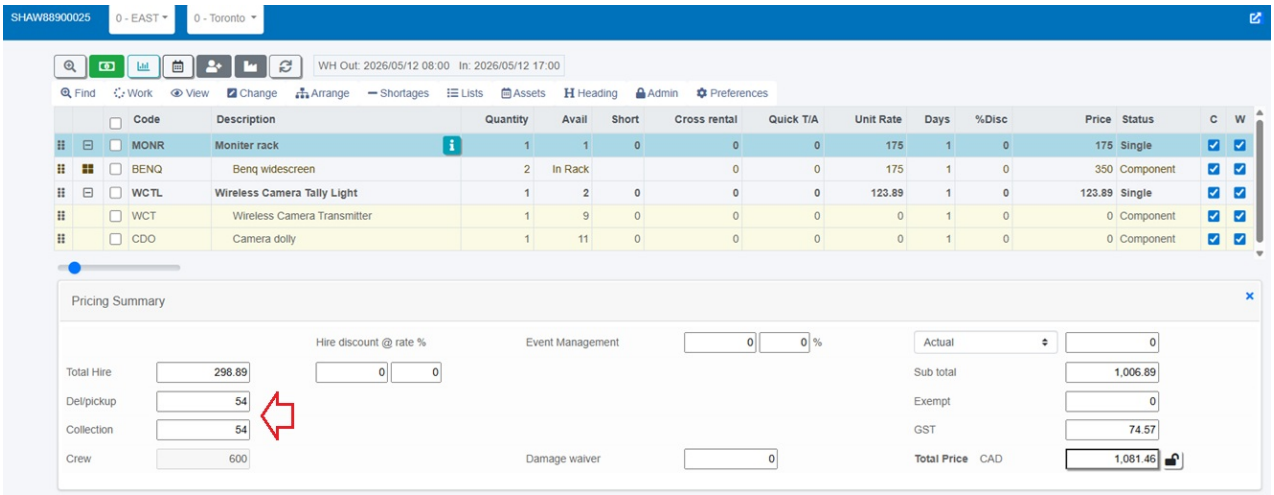

In RentalPoint, freight can be added to a booking in one of two ways:

- Manually on the **Equipment** tab.
- Using predefined freight on the **Freight** tab. Predefined freight charges are configured outside the booking (typically during initial setup) and then selected from the Freight tab when creating the booking.

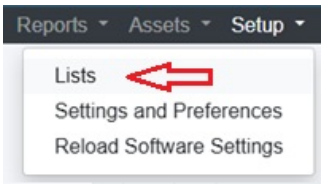
## Manual Freight Entry

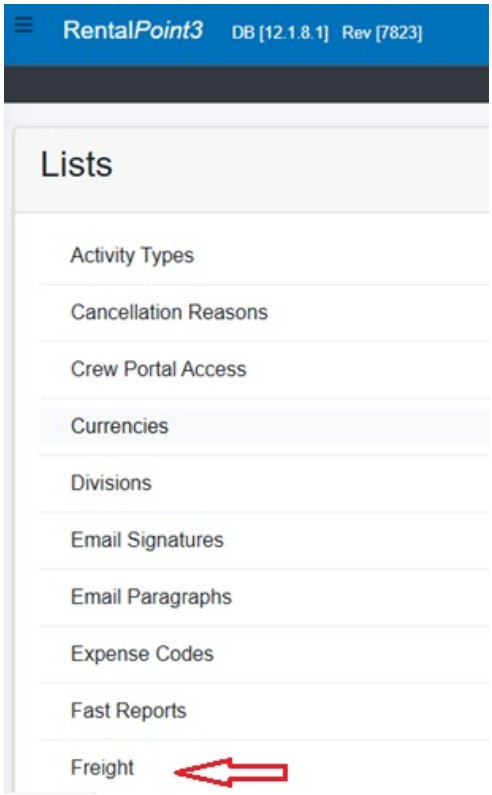
When activated, users can choose to manually enter freight on the Equipment Tab of a booking (per screenshot below). It's important to note that the freight tab is still available and any freight entered under the freight tab of the booking will supersede manual freight entry. This freight cost makes up part of the booking total price.

To activate this option set 'Allow Manual Entry of Freight = YES' in Pricing Parameter #24



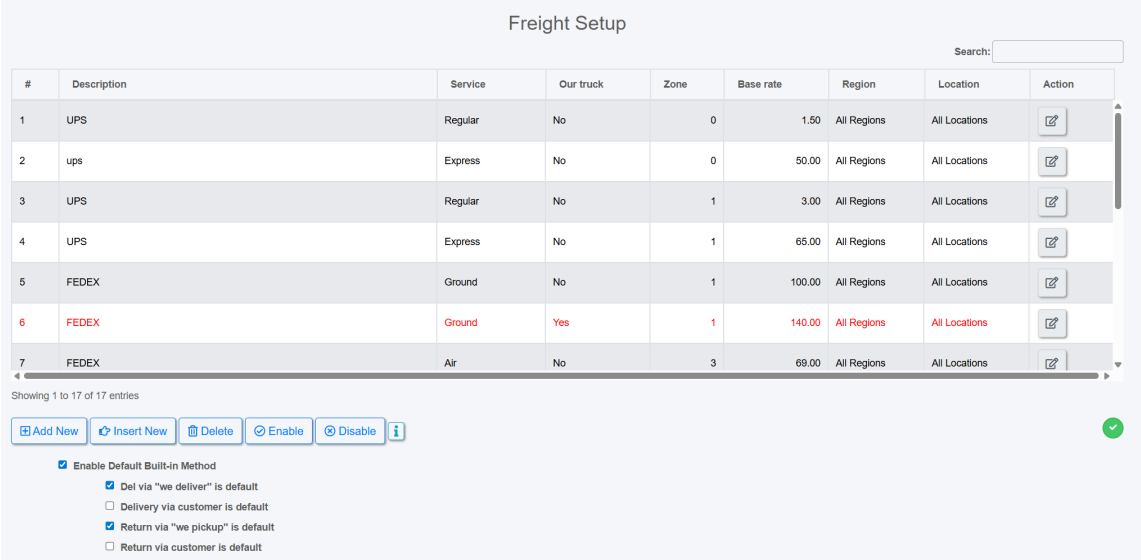

## Predefined Freight - The Display Window






The freight setup window displays differently based on parameter settings.

- When **Pricing Parameter #24** is set to 'Allow Manual Entry of Freight'
  - One charge for freight will be entered on the booking
  - The freight window displays as below
  - Region and Location fields display for multi-location systems only.




- When **Pricing Parameter #24** is set to 'Allow Manual Entry of Freight' = NO
  - The freight window displays as below.
  - The parameter also sets either
    - Single Freight Charge
      - A combined charge is stored for delivery and collection
    - OR 'Delivery, Collection and Fuel Surcharge'

        - Separate delivery and collection charges are stored against the booking along with a fuel surcharge
    - With no manual entry permitted, shipping costs can be calculated using the base rate up to a specified weight, however for freight greater than the defined weight a higher charge can be applied using the Rate per unit entered against each weight threshold.
    - Region and Location fields display for multi-location systems only.




## Predefined Freight- Service, Our Truck, Zones, Cost

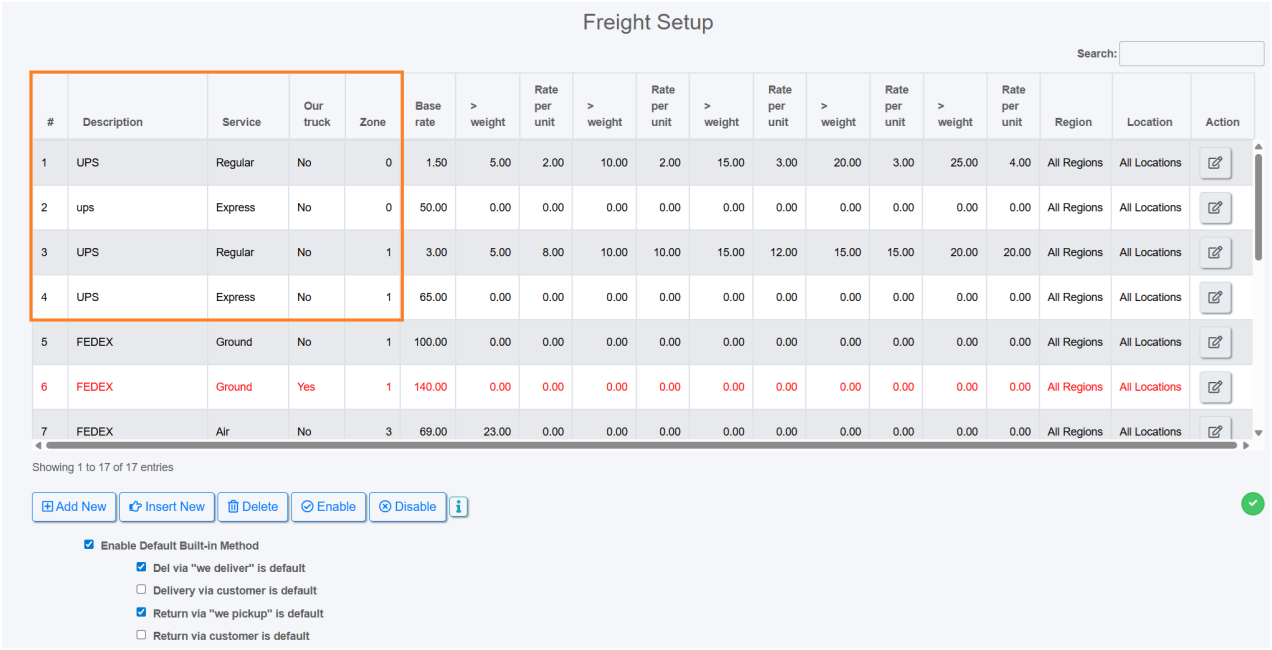
The Freight Setup window allows for configuration of multiple freight options for pickups and deliveries.

- Service is used to describe the type of service offered by the Freight description
- Our Truck is used to identify deliveries and returns that need to be tracked by the software in the Delivery & Return window
- Zones are used to denote distance to travel, so that the same service can be used to charge different rates for differing distances.
- Cost is used to advise the user of the cost of freight to the company, to avoid undercharging for freight on a booking

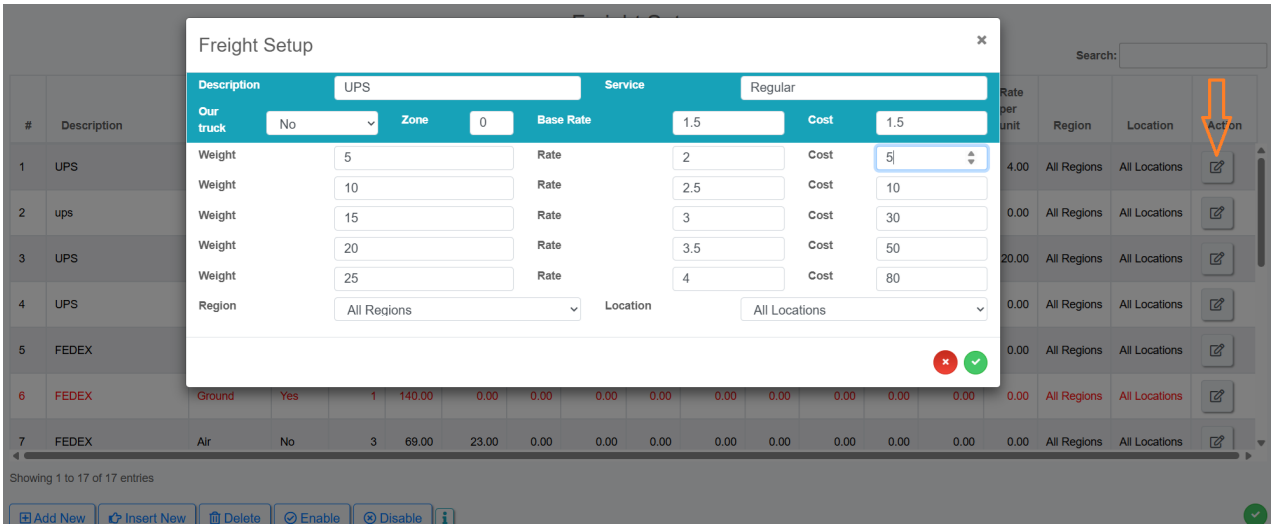
Below both a 'Regular' and an 'Express' service are set up for freight description UPS.

Each service covers two zones charged at different Base Rates and escalating rates per unit

Since 'Our Truck' is set to 'No', bookings using this freight option will not display in the Delivery and Return window since we don't need to track this freight in-house.




Edit any line entry to modify freight settings




# Predefined Freight - Rate Calculations

- **Base Rate**
  Used to calculate the freight charge up to the maximum weight entered.

  Example:

  A Base Rate of 7.5 with a Maximum Weight of 10Kg results in a freight charge of $75

- **Rate Per Unit (RPU)**
  Applies an additional charge for each unit above the maximum weight threshold, up to the next configured weight range. From the setup shown in line 1 above:

  - **Base Rate** = `1.5`
  - Weight breaks:
    - 5 lb → rate `2`
    - 10 lb → rate `2.5`
    - 15 lb → rate `3`

- 20 lb → rate `3.5`
- 25 lb → rate `4`

The software analyzes as follows:

Starts with the **BaseRate**

1. Finds the highest matching weight break ≤ booking weight (Use the highest weight tier that does not exceed the booking weight)
2. Adds:
   rate×(weight−first break weight)\text{rate} \times (\text{weight} - \text{first break weight})rate×(weight−first break weight)

For a booking weight of **20 lb**:

- First break weight = `5`
- Matching bracket = `20` with rate `3.5`
  So:

3.5×(20−5)3.5 \times (20 - 5)3.5×(20−5)

3.5×(20−5)=52.53.5 \times (20-5)=52.53.5×(20−5)=52.5

Then add the base rate:

52.5+1.5=54.052.5 + 1.5 = 54.052.5+1.5=54.0

52.5+1.5=54.052.5 + 1.5 = 54.052.5+1.5=54.0

Fuel surcharge is applied to collection.

Example assuming:

- Collection = `54`
- Fuel surcharge rate = `10%`

Then:

10%×54=5.4010\% \times 54 = 5.4010%×54=5.40

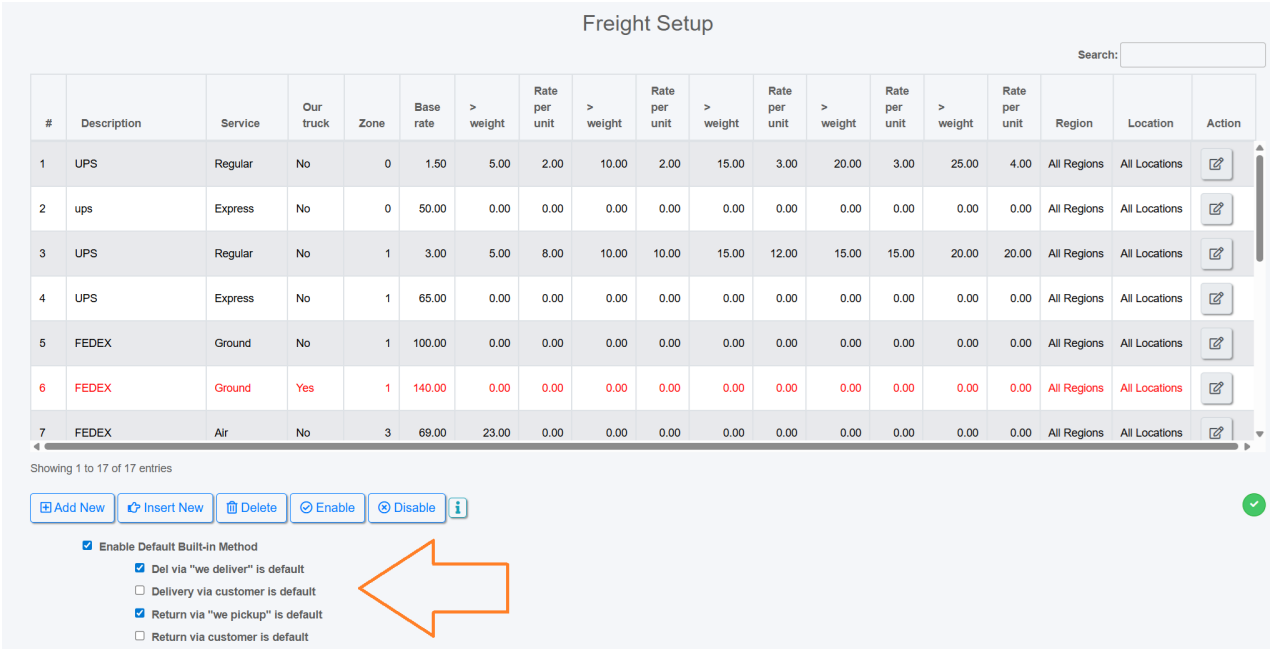
Total:

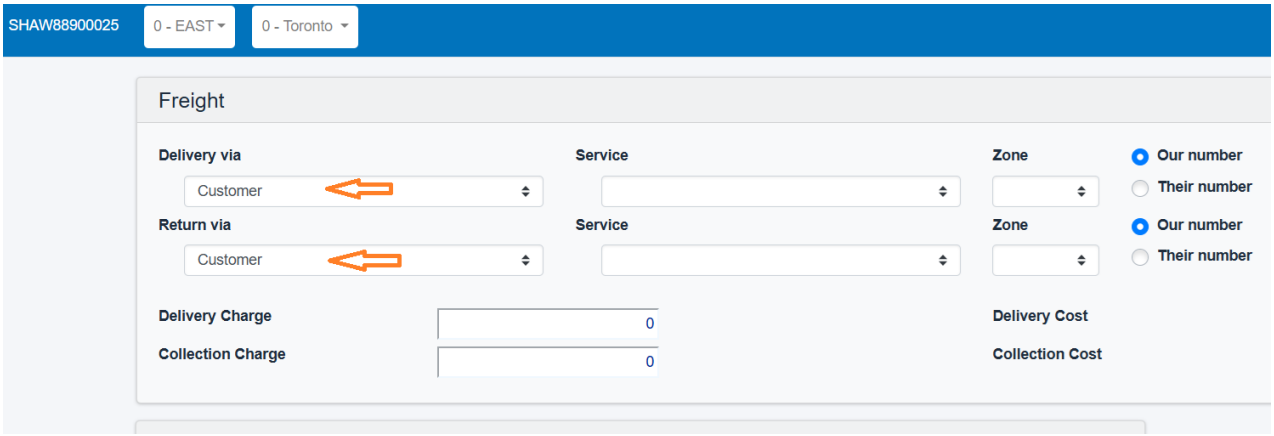
54+5.40=59.4054 + 5.40 = 59.4054+5.40=59.40

Using weight thresholds together with multiple freight services provides considerable flexibility when calculating freight charges.

## Predefined Freight - Default Built in Methods

Default freight settings can also be configured. These defaults are automatically applied whenever a new booking is created.




## Predefined Freight on the Booking

Now that freight has been set up it can be used in bookings. If you haven't done so already, log out and back in again to see the latest freight setup.

When freight is selected on a booking, the software intelligently groups the related options together offering one freight option for matching descriptions with differing service and zone options for that description. This setup provides flexibility for operators to manage different freight scenarios, including:

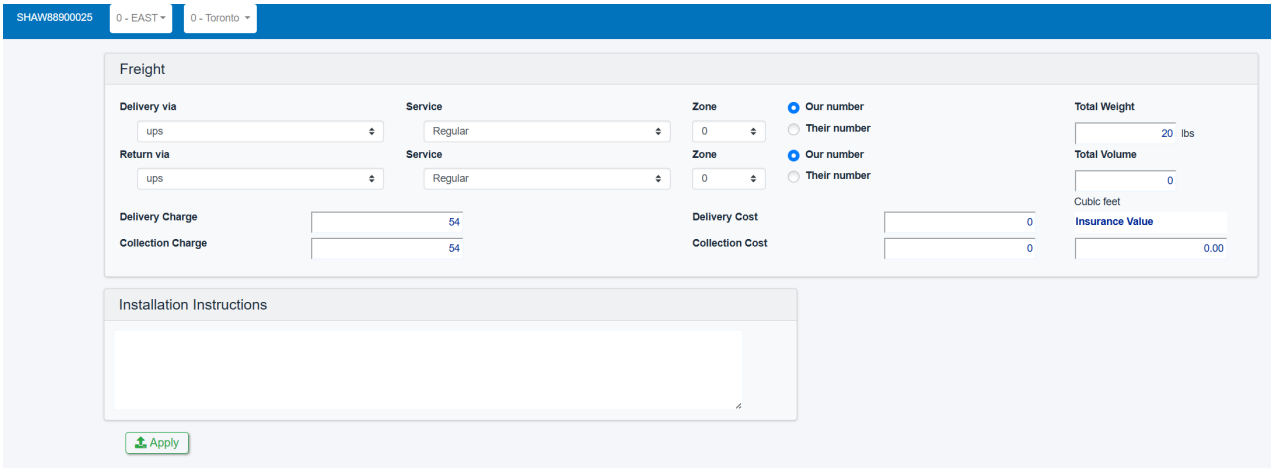
- Charging based on varying travel distances
- Applying preferred freight rates for selected customers
- Offering different shipping priorities and service levels

For our example, UPS will appear once in the list with options under 'Service' for Regular and Express and options under 'Zone' for 0 and 1

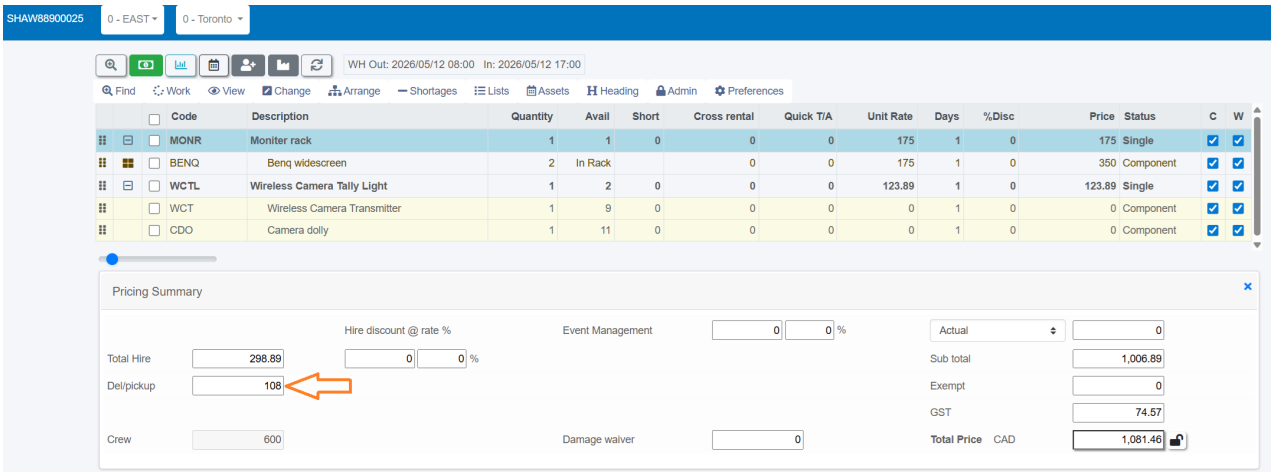
Our number/Their number is simply a toggle showing who is paying for freight.

- Our number: the freight cost is added to the booking
- Their number: the freight cost is noted on the booking but **NOT** added to the final quote since it will be paid

by the client




When freight is entered or modified click 'Apply' so that the latest freight is visible on the Equipment tab.

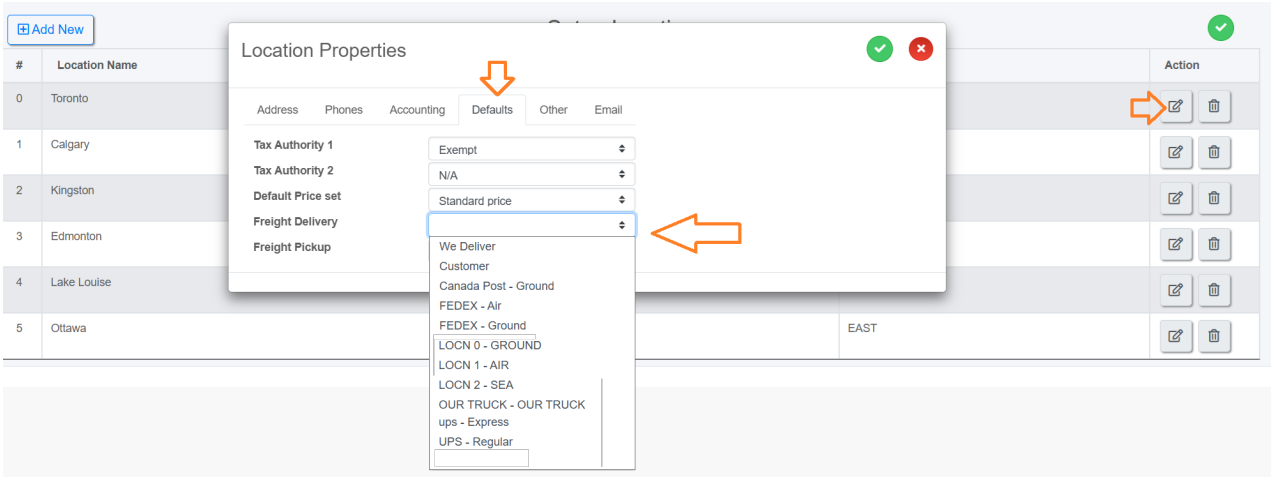



# Multi Location Freight

When using the multi-location module, an additional **Location** column will appear in the Freight Setup window allowing the freight option to be assigned either to all locations or to a specific location.

To configure Freight defaults for each location, navigate to **Setup → Locations**. edit the location to find the default settings for both **Delivery** and **Return** Freight options.

Note: When creating a booking, PO, cross rental or transfer, the freight options will display based on the location selected.




# Regions

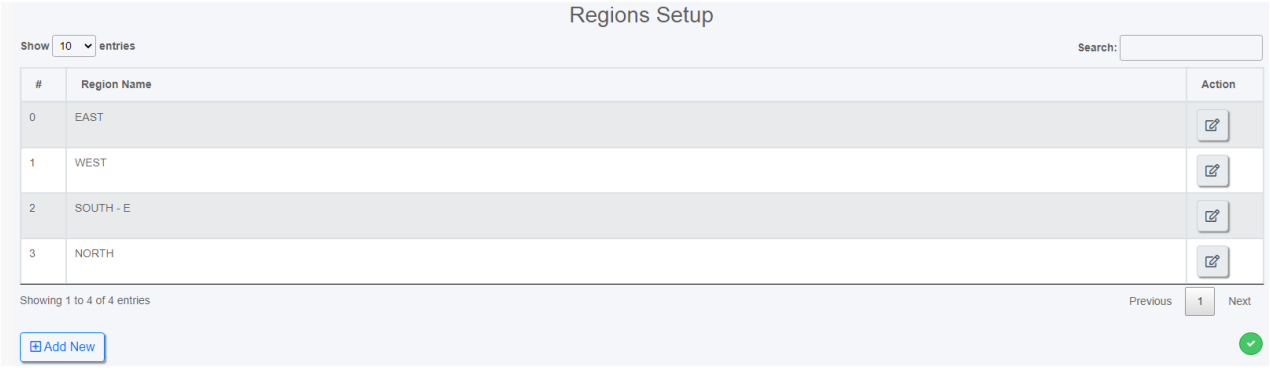
Used in conjunction with Locations, regions are used to group specific locations together.  A company with 4 locations, 2 in Eastern Timezone and 2 Pacific Timezone, might create an Eastern and Pacific region, then slot the relevant locations under each region.

To use the regions functionality it must first be enabled. Go to the Parameters option of the setup menu. Open Operational #174 -  Enable Region Support. Set this to Yes and restart RentalPoint.

Once you have restarted RentalPoint, the option for adding regions will be enabled. When RentalPoint is run again you will notice a region scope option at the bottom as well as a new option under the setup menu that allows you to configure regions.




To configure the regions, select the Regions option from the setup menu. By default the system will create a region for you, you can change the name to make it more descriptive. Once a Region has been added to the system it can be renamed but not deleted.




After entering Regions, go into Setup Locations and assign each of your locations to a Region.

Please note, once a Region has been created, you can rename it but not delete it. Bookings and other information in the system will still be linked to the region for reporting information.

**Scope and Searching**

The secondary scope in RentalPoint can also be sorted by regions. If you select a region from the secondary scope, any bookings that are assigned to that region, or to the locations in that region, are displayed. The secondary scope applies to other areas of RentalPoint, including the Shortages List, Products, and Purchase Orders.

When creating a booking, you can select a region from the list. Only the locations associated with that region display in the location drop down list.

**Equipment Availability**

Searching for equipment based on a region is quick and easy. Enabling Operational Parameter #127 – Equipment Search Location Sensitive displays an extra search tab in the equipment grid of the booking. Select the region, then continue entering your equipment as normal. Availability is based on location but the tree view and the search are based on the quantities in the region.

**Technicians**

When entering a technician, the region in which they work can be specified. Then when a booking is created only those technicians that work in the region specified in the booking can be selected.

**Custom Printing**

When printing custom templates throughout the system, you can specify region specific templates. For example, your Eastern region may have different printouts then your Western region. Using the custom printing option, you can easily organize your templates, so the Eastern region does not accidentally use a Western region template.

**Reports**

Several reports in the system, such as the Booking Cross Section, Invoice Register and Revenue Report can be sorted by regions, making accounting duties much more simplified.

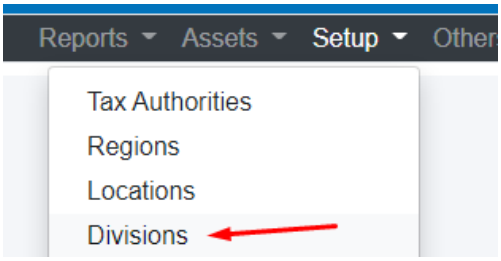
# Divisions

## Divisions

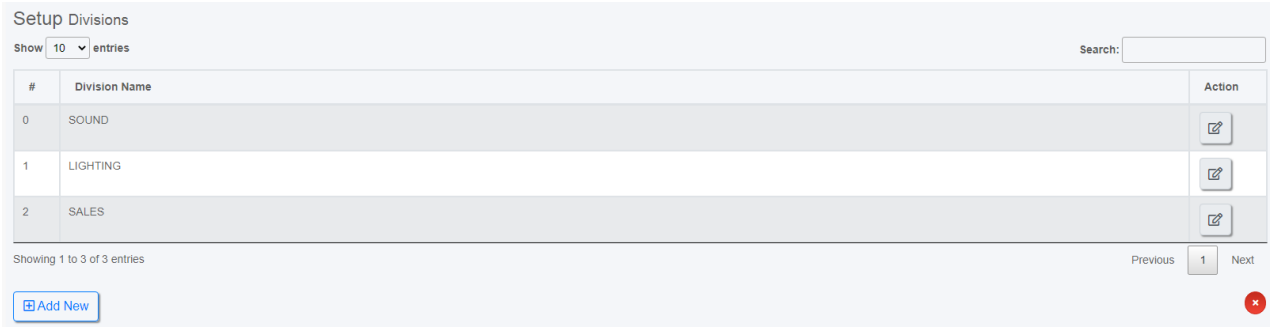
Divisions are useful to distribute and track revenue in different departments. For instance if you have a sound department and a lighting department specifying a division on bookings will allows reporting on a specific department.

## Revenue Separation

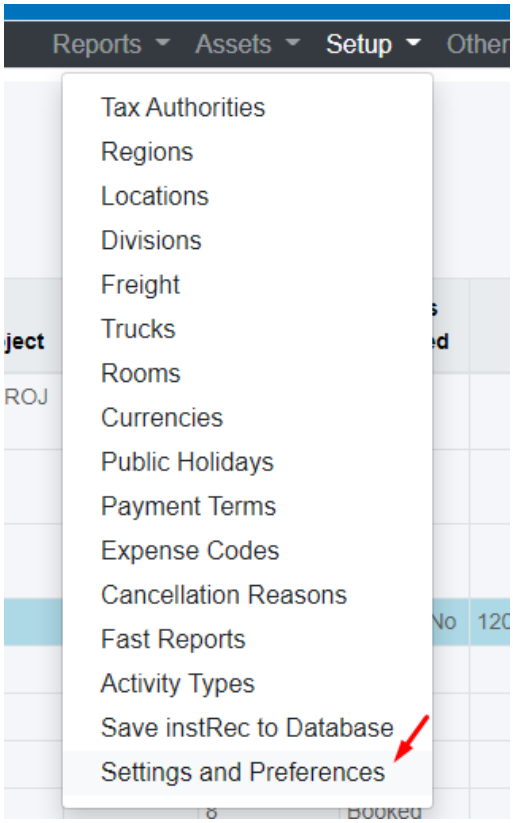
Divisions are used to separate income from bookings into a specified division or department of a company. A division is selected at the booking level. When a booking is invoiced, the invoice uses the division from the booking. When the invoice is paid, the payment uses the division from the invoice that it is applied to. Using divisions does not affect the booking in any way, it only affects reports and accounting activities after the booking is invoiced. Reports in RentalPoint, such as statements and account receivables, sort revenue by division. Divisions are not mandatory and are only something to be considered if you require more organized income separation.To create divisions click the Division option within the setup menu. Once a division is saved in the system it can be edited but not removed.

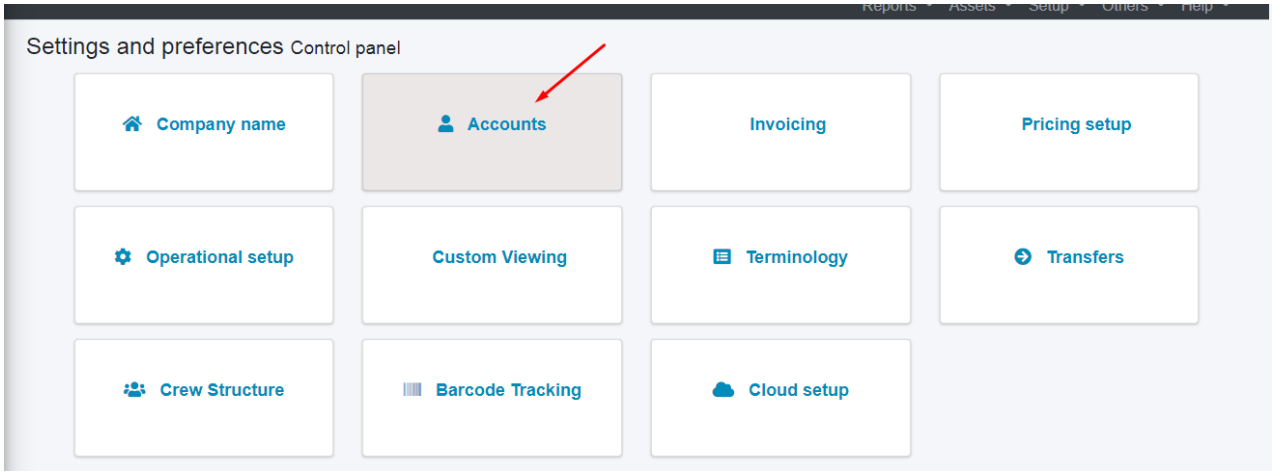


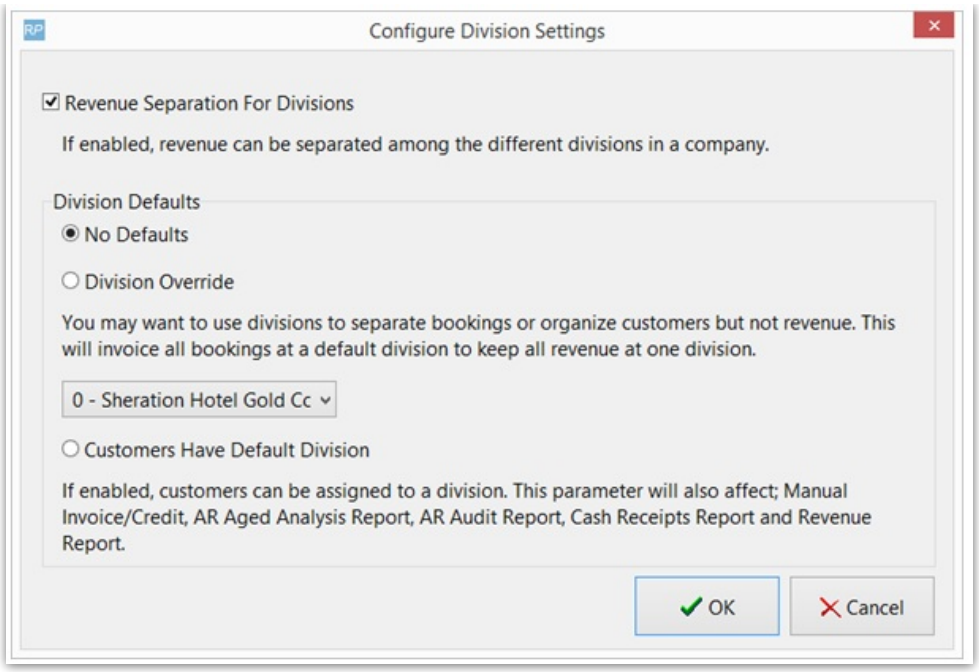

A setup window displays with a blank list. To add more divisions click Add New. Once the desired divisions are added, they will be displayed. RentalPoint will need to be restarted for the settings to take effect. The divisions will be available in bookings under the Other Details tab.




To use divisions you'll need to enable **accounts parameter #24**.

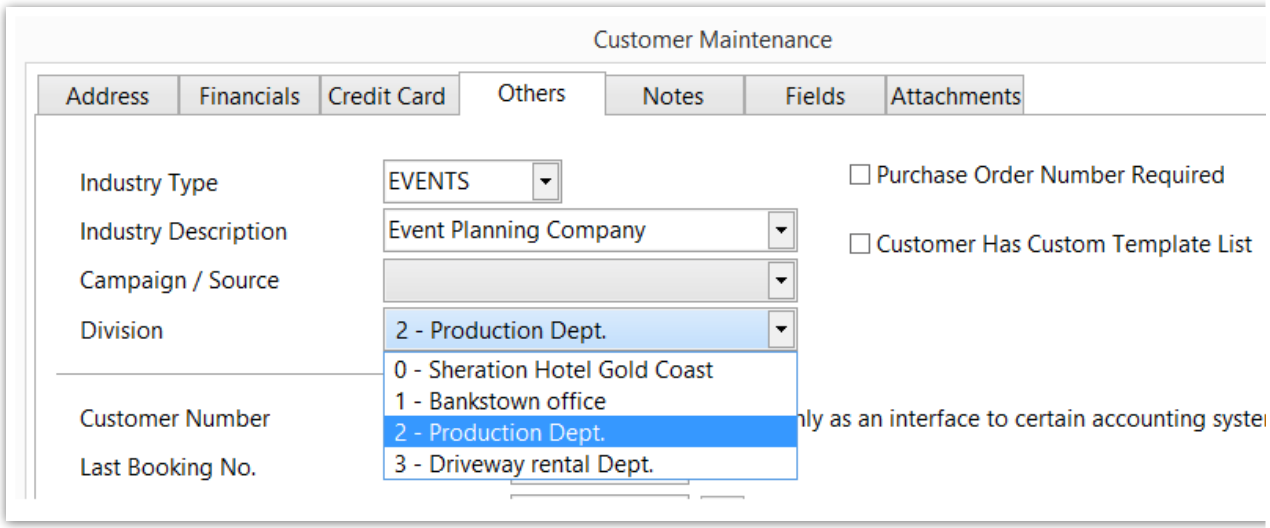

Reports
Assets
Setup
Other
Tax Authorities
Regions
Locations
Divisions
Freight
Trucks
Rooms
Currencies
Public Holidays
Payment Terms
Expense Codes
Cancellation Reasons
Fast Reports
Activity Types
Save instRec to Database
Settings and Preferences


Settings and preferences Control panel
Company name
Accounts
Invoicing
Pricing setup
Operational setup
Custom Viewing
Terminology
Transfers
Crew Structure
Barcode Tracking
Cloud setup



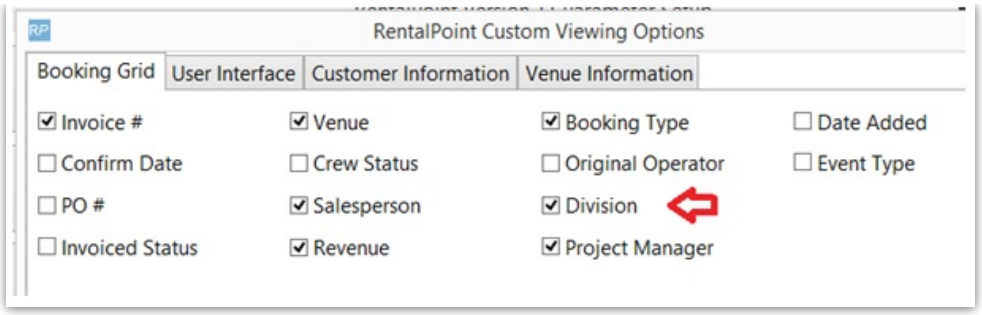

## Customers have default division

If you want certain customers to have a default division so that any bookings for that customer will automatically have the correct division selected you can enable accounts parameter #30. Additionally any pre-payments entered for the customer will be allocated to the customer's division before being assigned to a specific invoice when the payment will be applied to the division the invoice was generated for.You can then select a division for each customer on the Others tab of customer properties. This division will then be filled in for any new booking entered for the customer.

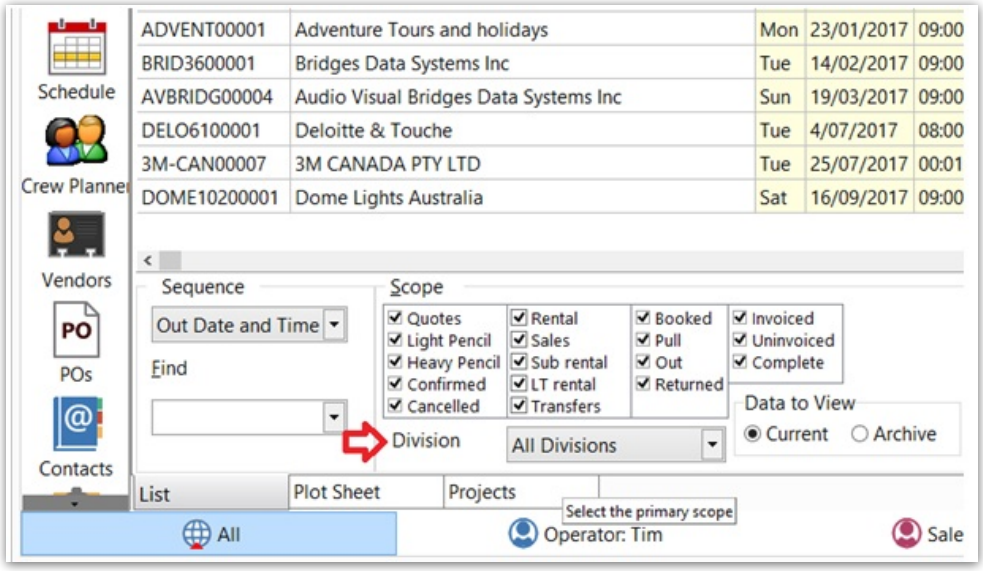



## Bookings

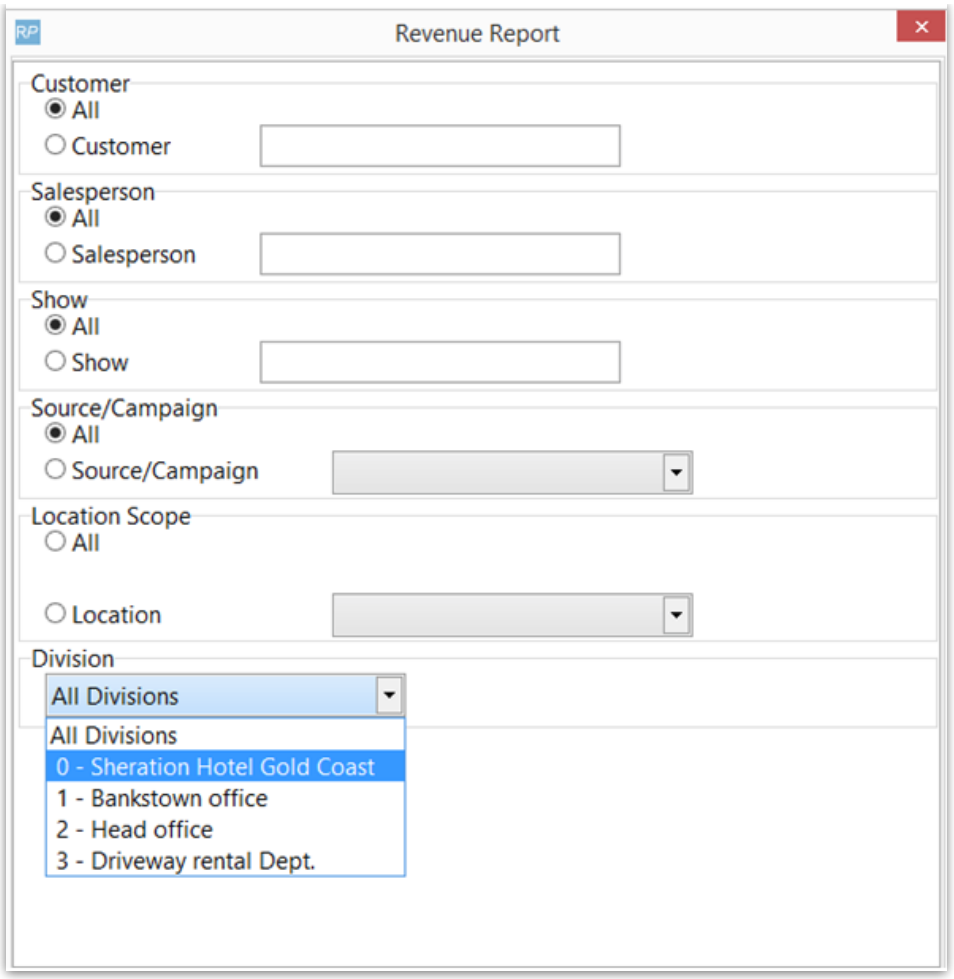
**To add a "Division" filter to the main booking window**
In the main setup window, click on "Custom viewing", then check "Division" as below -



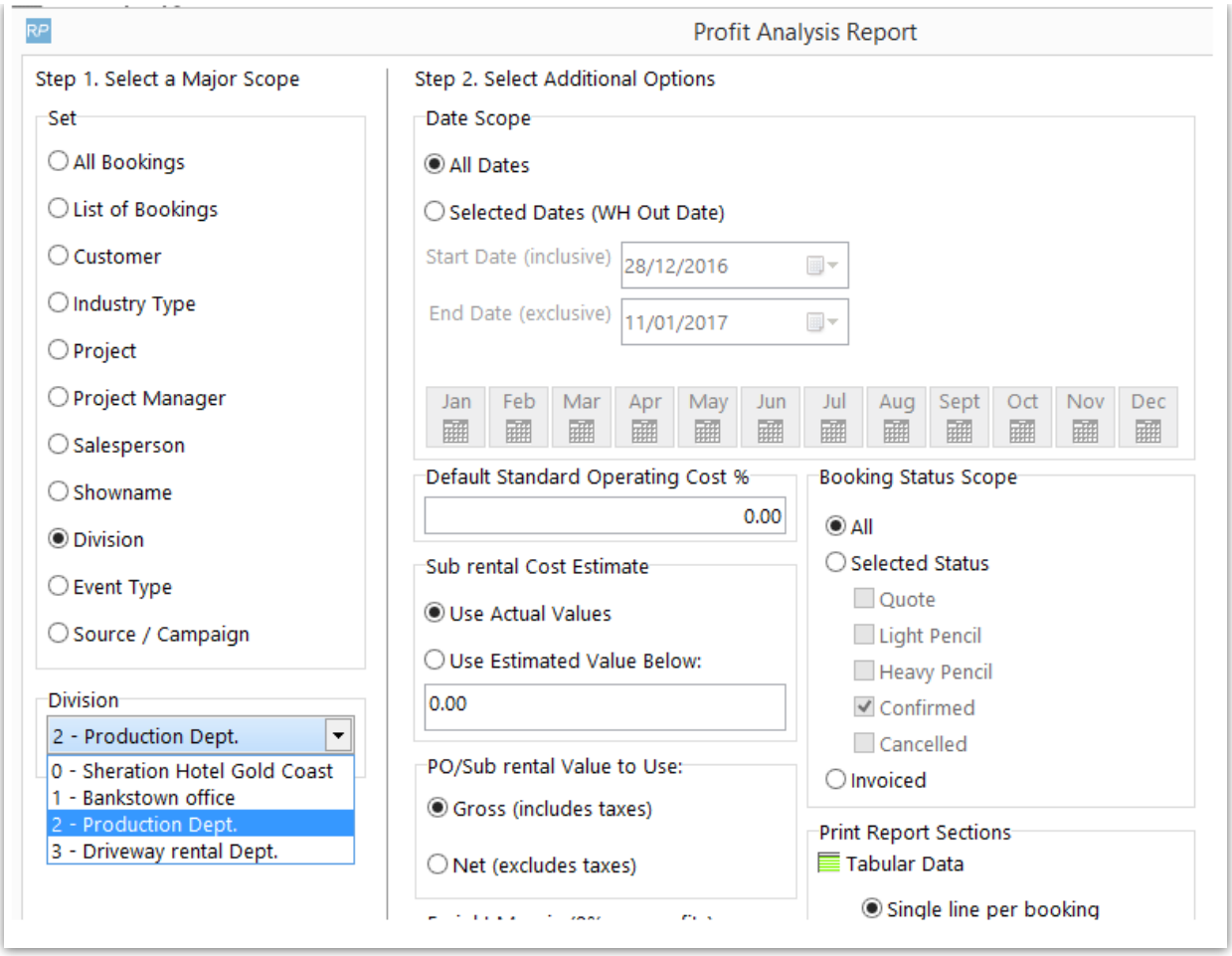

This will then add a filter to the main booking window so you can filter on division, as below -




## Revenue Report By Division




## Profit Analysis Report

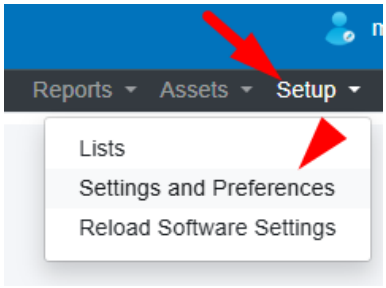



# Pricing Parameters

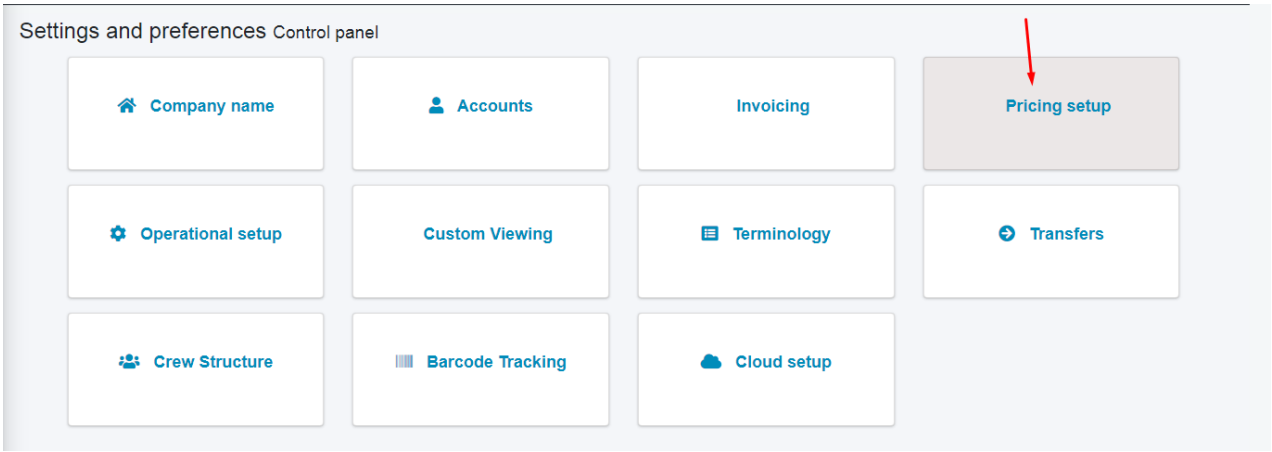
RentalPoint Pricing Parameters are used to customize how your business prices inventory for use. Take a few minutes to review the setting options below, then contact support@rentp.com for further assistance as needed.

## Access Pricing Setup

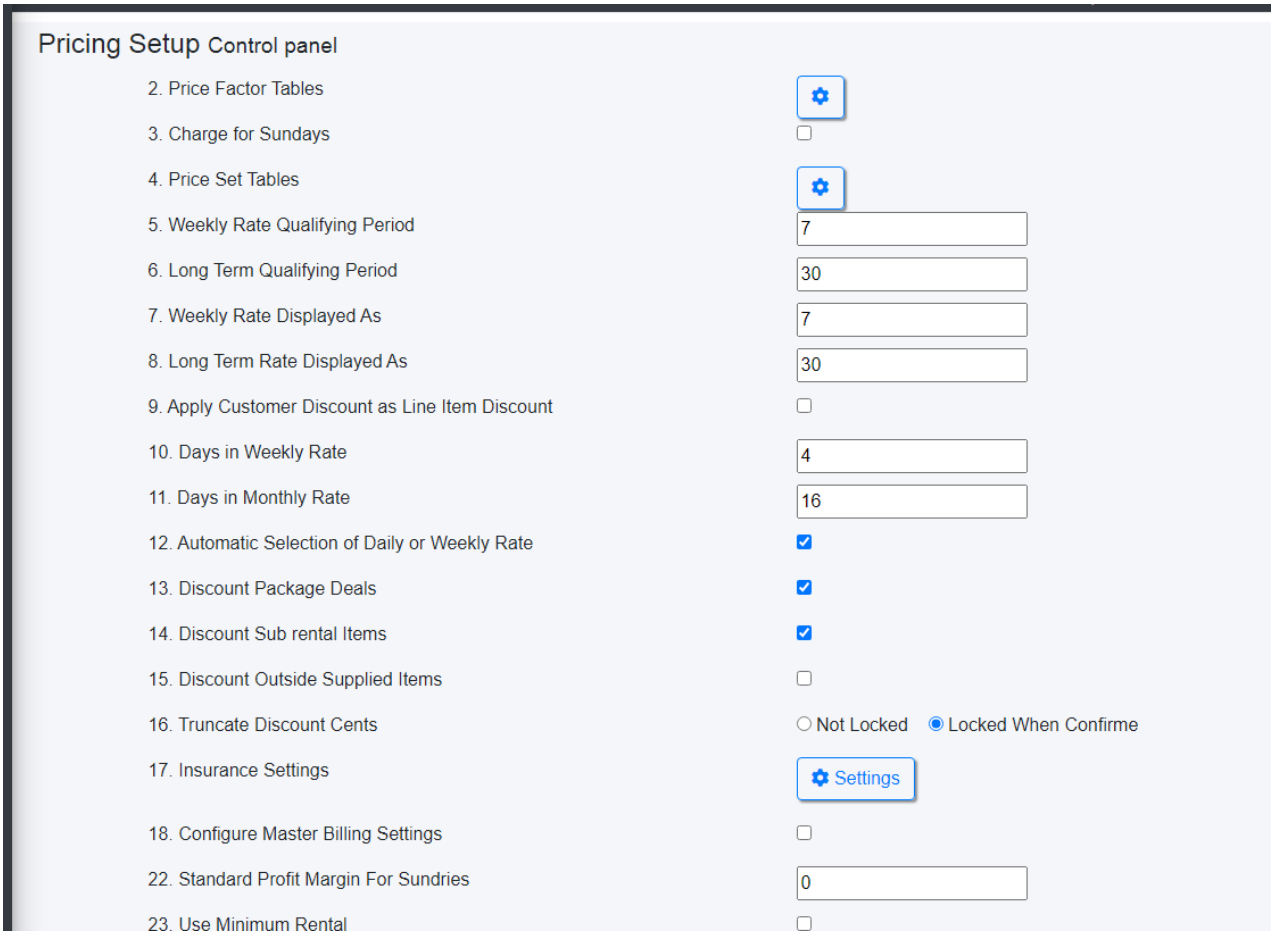
From the main menu click Setup-->Settings and Preferences




Then select Pricing Setup




Complete the parameter information to suit your company preferences




## Pricing Parameters Explained

| Number | Parameter | Description | Used with Parameter # |
|---|---|---|---|

| Number | Parameter | Description | Used with Parameter # |
|---|---|---|---|
| 2 | Price Factor Tables | Specify the number of days charged for each rental day. Six tables available. When enabled, Price Factor Tables override most other pricing parameters with the exception of Pricing #3 - Sunday Charge Option<br>• Note that a zero in day 1 of table zero disables all the price factor tables.<br>• Day 1 in each table must be 1 - a zero in day 1 of a table disables the table<br>• When you want the long term/monthly rate to take over, leave the factor as zero for the day. All days in that table from that point will use long term/monthly<br>• Days using can be modified for each line in a booking instead of using the overall days using for the booking - Need to check 'use line days' in table setup to apply this feature | Operational #2 |
| 3 | Charge Sundays in First Week | Whether or not to charge for Sundays when renting gear. It can be used with the following pricing structures:<br>• Operational #2 - Always use Flat Days Charged<br>• Pricing #2 - Price Factor Tables. You have an option here to only have the first Sunday Free or set 'all Sundays are Free'<br>• Pricing #55 - Multi-Rate Pricing Scheme<br>• Pricing #70 - First Day Extra Day Pricing | |
| 4 | Price Set Tables | Multiple Price Sets can be used against each Rental Product for the purpose of offering different pricing schemes for different locations/currencies/customers. You may also use this option to price gear in different product groups at different rates. | |
| 5 | Weekly Rate Qualifying Period | Number of days rental before the weekly rate is applied. This option is usually set to 7 days, however some companies set a qualifying period that is higher i.e. 10/14/21 days. Rentals of periods shorter than this number will be charged at the more expensive daily rate. This option works in conjunction with Pricing Parameter #12 - Automatic selection of daily or weekly rate. | |
| 6 | Long Term Qualifying Period | Number of days rental before the monthly rate is applied. This option is usually set to 30 days. Rentals of periods shorter than this number will be charged at the more expensive daily or weekly rate. This option works in conjunction with Pricing Parameter #12 - Automatic selection of daily or weekly rate. | |
| 7 | Weekly Rate is Displayed as | The number of days the weekly rate is displayed as (usually 7) and should not be changed once products and prices have been entered. | |

| Number | Parameter | Description | Used with Parameter # |
|---|---|---|---|
| 8 | Long Term Rate Displayed as | The number of days the monthly rate is displayed as (usually 28 or 30) and should not be changed once products and prices have been entered. | |
| 9 | Apply Customer Discount as Line Item Discount | When adding rental items to a booking, automatically apply the customer discount rate as a line item discount. | |
| 10 | Days in Weekly rate | The number of days the system counts as a week. This parameter overrides the weekly rate entered in the Rental Rates Tab of a product.<br>• If your weekly rate is always calculated as a factor of the daily rate, then you can enter that factor in this option and save the work of entering a weekly rate for each of your products in inventory.<br>• If you have separate weekly rates for each product, then leave this parameter at zero. | Pricing #2 |
| 11 | Days in Monthly Rate | Number of days used in monthly rate calculation (formula is days in monthly rate x daily rate). This parameter overrides the monthly rate entered in the Rental Rates Tab of a product.<br>• If your monthly rate is always calculated as a factor of the daily rate, then you can enter that factor in this option and save the work of entering a monthly rate for each of your products in inventory.<br>• If you have separate monthly rates for each product, then leave this parameter at zero. | Pricing #2 |
| 12 | Automatic Selection of Daily or Weekly Rate | This parameter defines whether the daily rate or the monthly rate is automatically selected. If this option is enabled then the system will automatically select a default rate, otherwise the system will prompt the operator for a decision each time. This option is used in conjunction with Pricing #10 and Pricing #11. Note: Price Factor Tables will override this option until the price factor table ends. | |
| 13 | Discount Package Deals | Defines if discounts applied to the booking should be applied to package deals. If unchecked, package deals with be exempt from discounts. | |
| 14 | Discount Sub rental Items | Defines if discounts applied to the booking should be applied to sub rentals If unchecked, sub rentals with be exempt from discounts. | |
| 15 | Discount Outside Supplied Items | Defines if discounts applied to the booking should be applied to items marked as outside supplied If unchecked, outside supplied items with be exempt from discounts. | |
| 16 | Truncate Discount Cents | This option zeroes the cents in the discount column. The option only applies to the sum discount amount, not the individual line item discounts. | |

| Number | Parameter | Description | Used with Parameter # |
|---|---|---|---|
| 17 | Insurance/Damage Waiver Settings | Settings for calculation of Insurance/Damage Waiver on a booking | |
| 18 | Master Bill Settings | Defines if Hotel Master Billing is in use | |
| 22 | Standard Profit Margin for Sundries | This percentage is used to calculate the profit margin for sundries on a booking. The calculation is based on the total undiscounted sundry amount. | |
| 23 | Use Minimal Rental | With this option enabled, a minimum value will be charged for rental items. A minimal rental amount should be entered for each individual rental product via product setup. | |
| 24 | Freight Charge Breakdown | Provides an option to use a single freight charge OR separate freight charge into delivery, collection and fuel surcharge.<br>Also provides option to 'allow manual entry' of freight charge on the equipment tab of a booking. | |
| 25 | Freight Price Lock Default | Defines if/when freight price on a booking should be locked for changes | |
| 26 | | | |
| 27 | Currency Set on PO by PO Basis | • When this option is enabled, the currency for POs and Sub Rentals will be set on an order by order basis. When entering a new standalone PO or Sub Rental, the default currency will come from the selected vendor or customer. When entering a new PO or Sub Rental for a booking, the default currency will come from the booking. Once save, the currency for POs and Sub Rentals can be changed via a drop down within the order.<br>• When this option is disabled, the currency for POs and Sub Rentals will come from the selected vendor or customer record. Users will not have the ability to change the currency on the order. | |
| 28 | Event Management Surcharge | Event Management is an additional surcharge that you can add to a booking, much like Damage Waiver, freight surcharge or credit card surcharge. The event management value applies to the sub total of a booking and displays in the totals area of a booking. You can also apply separate taxes to the surcharge in the setup tax authorities window. | |
| 29 | Number of Hours Before an Extra Day | This is the number of hours difference between the delivery date and time and the return date time before the system adds 1 to the number of days or term of the rental. | |
| 31 | Extra Day Rate Calculation | Using this option saves the extra day from being entered on every product. The extra day rate is calculated from the day rate using the percentage entered. If the extra day rate is always the same as the first day rate, then enter a value of 100 in this field. | |

| Number | Parameter | Description | Used with Parameter # |
|---|---|---|---|
| 32 | Euro Support | This option is only relevant if multi currency support is enabled. The setting is used for Euro support only. Once enabled, all currencies will be converted via the Euro. The currency rates in currency setup must be the rates compared to the Euro. No support for currencies outside Europe will be possible. | |
| 33 | Show Line Item Days in Booking | This option displays a days column in the equipment grid of a booking. Users can edit each item and modify the says to a custom charge.<br>This option is compatible with the following pricing schemes:<br>• Default pricing (first day rate/weekly rate/long term rate)<br>• First Day/Extra Day<br>• Price Factor Tables<br>• Flat Days Charged - the days column will serve as 'days charged' for each line item | Pricing #2<br>Pricing #70 |
| 36 | Limit New Customers to Retail | When enabled, any new customer set up through the booking window will be set to charge the retail price on sales items via 'price set customer pays for sales'. Edit the customer record to change any customer price sets as needed. | |
| 37 | | | |
| 38 | Default Sundry Markup Percentage | A sundry is an item you charge for that does not fall into any of the other categories such as labour, rental, sales or delivery. The default percentage may still be overridden when a sundry item is added to a booking. | |
| 43 | Allow Auto Discount of Sales Items | When the user overrides the total price on a booking, a discount is applied to rental items to cater for the price reduction. If there is not enough rental discount available to lower the price, then the sales items will be discounted IF this parameter is enabled. | |
| 44 | | | |
| 45 | Value Added Tax Rounding (Up/Down) | Rounding will only be changed at the start of a new tax period. Rounding must be consistent on all invoices during the period. When enabled, >=.5 will be rounded down. All other values will be rounded up. | |
| 48 | Pricing Basis for Losses | Defines pricing applied to losses or breakages | |
| 52 | Sales Costing Method | • First in First Out - true sales costs will be considered<br>• Average - average costs of sales items will be used | |
| 53 | Default Price Set | Default price set for each booking is pulled from either the current location or the customer, depending on the setting of this parameter. | |
| 55 | Multi-Rate Pricing Scheme | Defines settings for multi rate pricing method | |

| Number | Parameter | Description | Used with Parameter # |
|---|---|---|---|
| 58 | Double Discount Projects | When enabled, the project discounts will be applied after the booking discounts for project invoices. | |
| 64 | Default Number of Days to Charge for a Booking | Operational Parameter #2 - Always use flat days charged must be enabled to use this setting.<br>This is the default number of days to charge for a booking | Must be used with days charged parameter |
| 67 | Deposit Based on Percentage of Cost Price | Enter a percentage that the deposit is based on, zero will disable this option. | |
| 68 | Crew/Installation Based on Percentage | Enter a percentage that will be used to calculate crew costs. Formula is rental amount x percentage entered. | |
| 69 | Default Discount Percentage for Backup Equipment | Line items may be flagged as backup equipment in the booking. The line item discount percentage will default to this percentage. The line item discount column must be enabled for this backup percentage feature to work. | |
| 70 | Enable First Day Extra Day Pricing | Price Factor Tables must be disabled for this optio to work. Prices will be calculated based on first day rate + (extra day rate x number of extra days) | |
| 72 | Use Last Purchase Price or Average Cost | When entering a new product in Product setup<br>• Average Cost - Product cost is updated with the average cost price<br>• Last Purchase Price - Product cost is updated with the past purchase price | |
| 75 | Allow Zero Value Sub Rental | Permit a value of zero to be entered as the total value for Sub Rentals | |
| 79 | Standard Cost Default Percentage | This percentage will be used to apply a standard cost to all rental equipment that does not have a standard cost entered at the category level in product setup. | |

## Show Line Item Days in a Booking

When enabled, you can change the number of days individually for each line item on the Equipment Grid of a booking rather than using one overall number of days.

The meaning of the number entered depends on your pricing scheme:

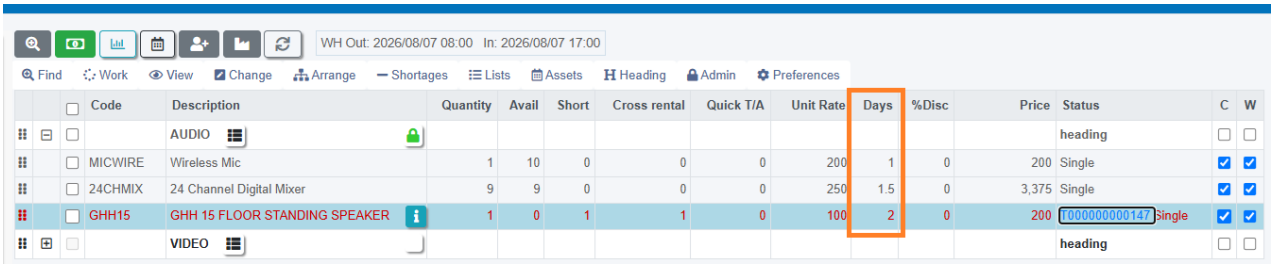
- Days using: The number must be a whole number (e.g., 1, 2, 3 days).
- Days charged: Fractions are allowed (e.g., 1.5 or 2.5 days).

The option works with these pricing schemes:

- Default pricing — first-day rate / weekly rate / long-term rate
- First day / extra day
- Price factor tables
- Flat days charged

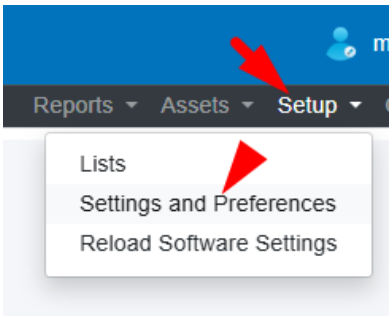
For price factor tables, the option can be enabled either:

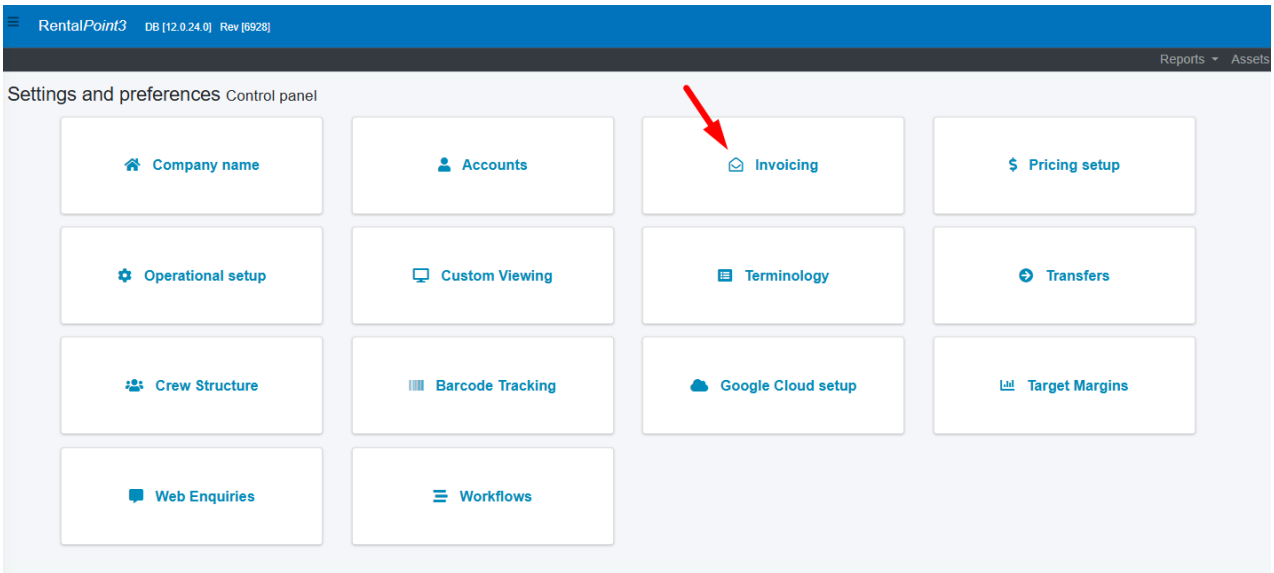
- From the Price Factor Table area, or
- By using Pricing Parameter #33




# Invoice Parameters

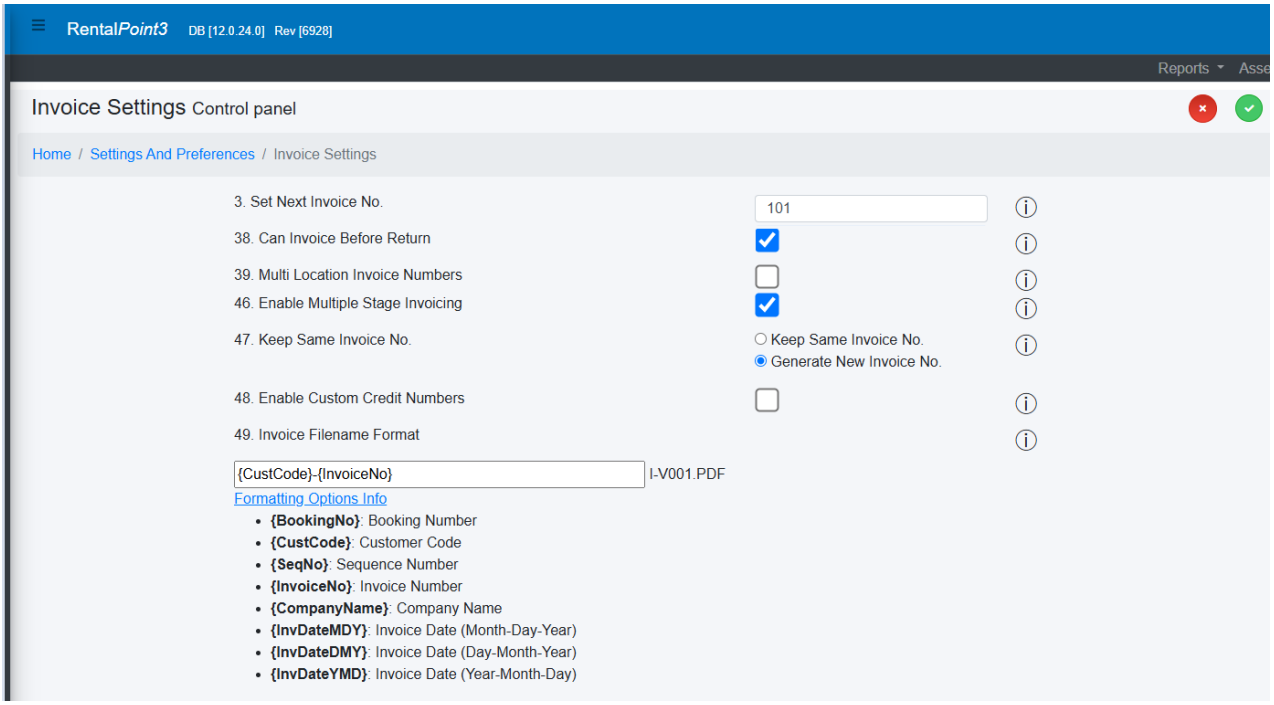
Invoicing can be customized with the options below. Remember to reload software settings after any parameter change




| # | Description | Details |
|---|---|---|

| | | |
|---|---|---|
| 3 | Next Invoice Number | Instead of starting with invoice #1, use this parameter to determine the next invoice number you would like the software to assign. |
| 38 | Can Invoice before Return | Check this box to allow a booking to be invoiced before the booking is returned |
| 39 | Multi Location Invoice numbers | Check this box to set different numbers for each location in use, then go to Location setup to set the starting number for each location. |
| 46 | Enable Multi-Stage Invoicing | Check this box to activate multi-stage invoicing options in the Finalcials tab of a booking |
| 48 | Enable Custom Credit Numbers | Enable custom credit numbers with a separate sequence to invoice numbers |
| 49 | Invoice Filename Format | Use a combination of fields to define the invoice filename that will be used when an invoice is generated |
| | | |




# RentalPoint Operators

## Operator Security

**RentalPoint Small Business Edition (SBE)** uses operators without group-based security. Essentially, all operators have the same level of access to the software.

**RentalPoint Pro** provides more advanced operator security through Operator Groups. Each group can be assigned different access privileges, determining which RentalPoint features the operators in that group are permitted to use.

To configure operator security:

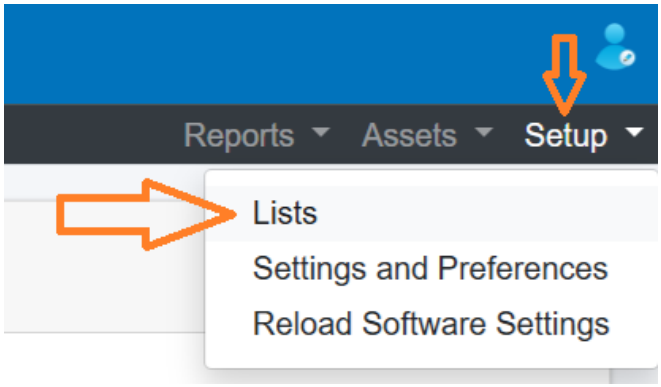
1. Create an **Operator Group**.

2. Assign the appropriate permissions for the RentalPoint features the group should be able to access.
3. Add the relevant operators to the group.
4. The permissions assigned to the group will automatically apply to all operators within that group.

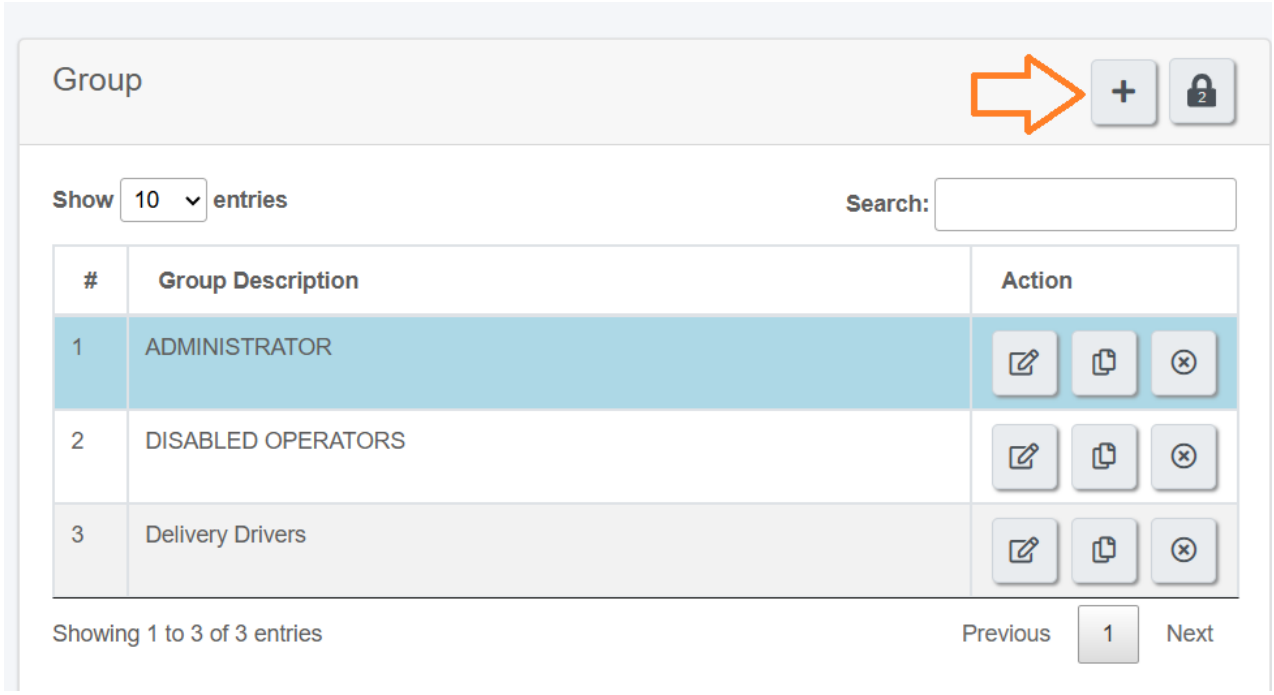
Each individual who needs to be tracked in RentalPoint should have their own operator account. However, a shared login may be appropriate in situations such as a shop computer that is used by multiple people.

## Operator Groups

Navigate to the Operators options in Setup-->Lists

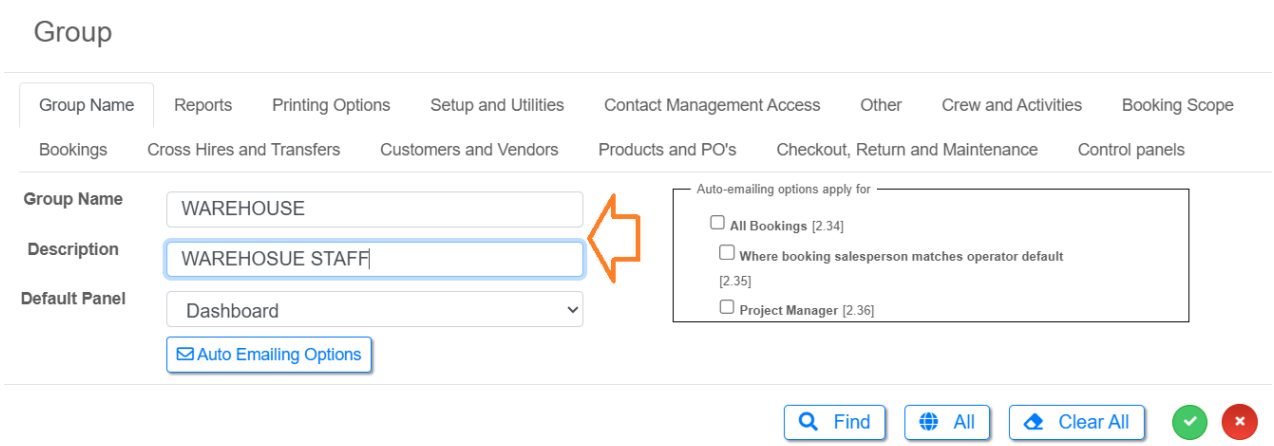



Create Operator Groups using the Add option

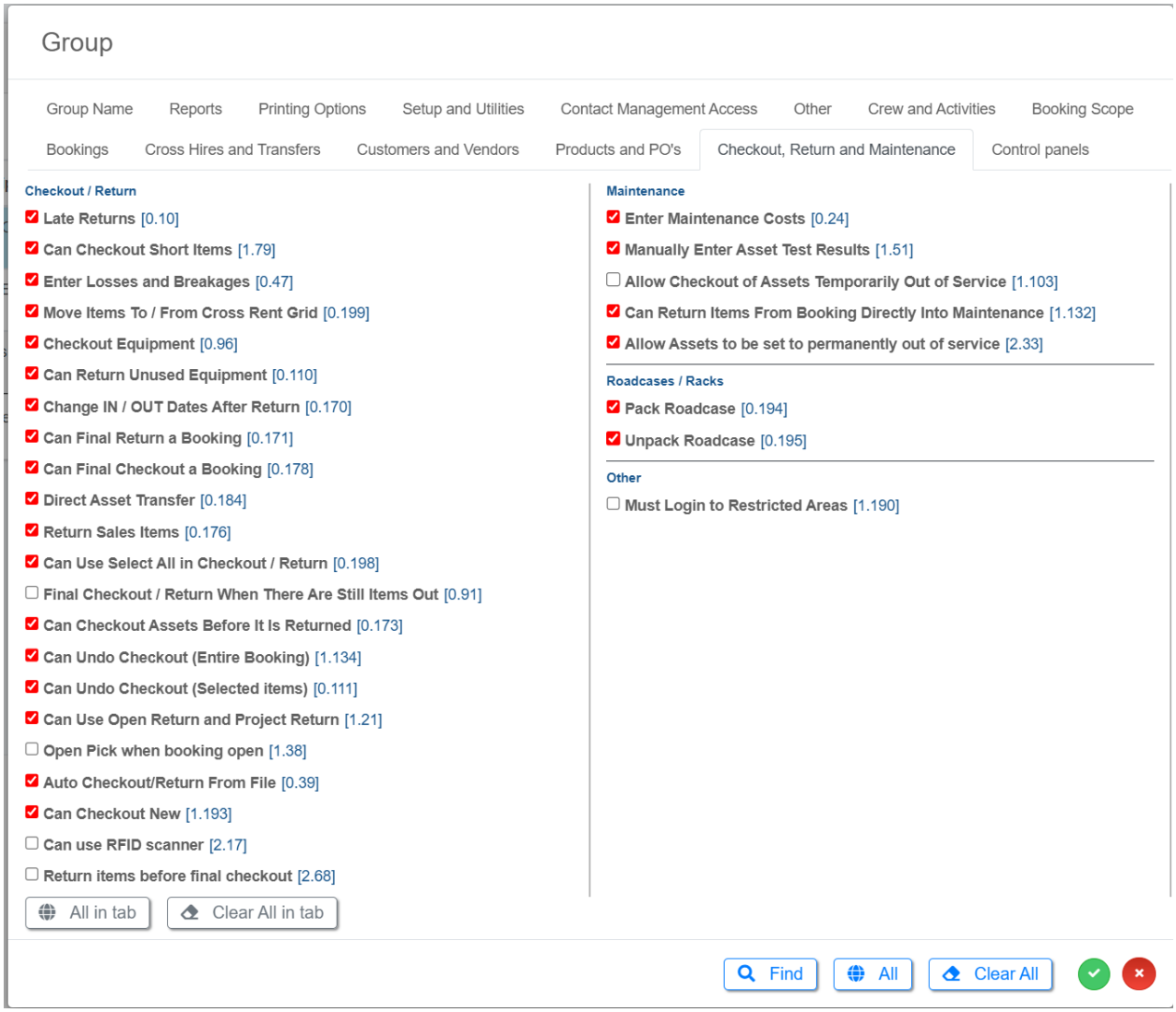



Assign a unique name and description to the group

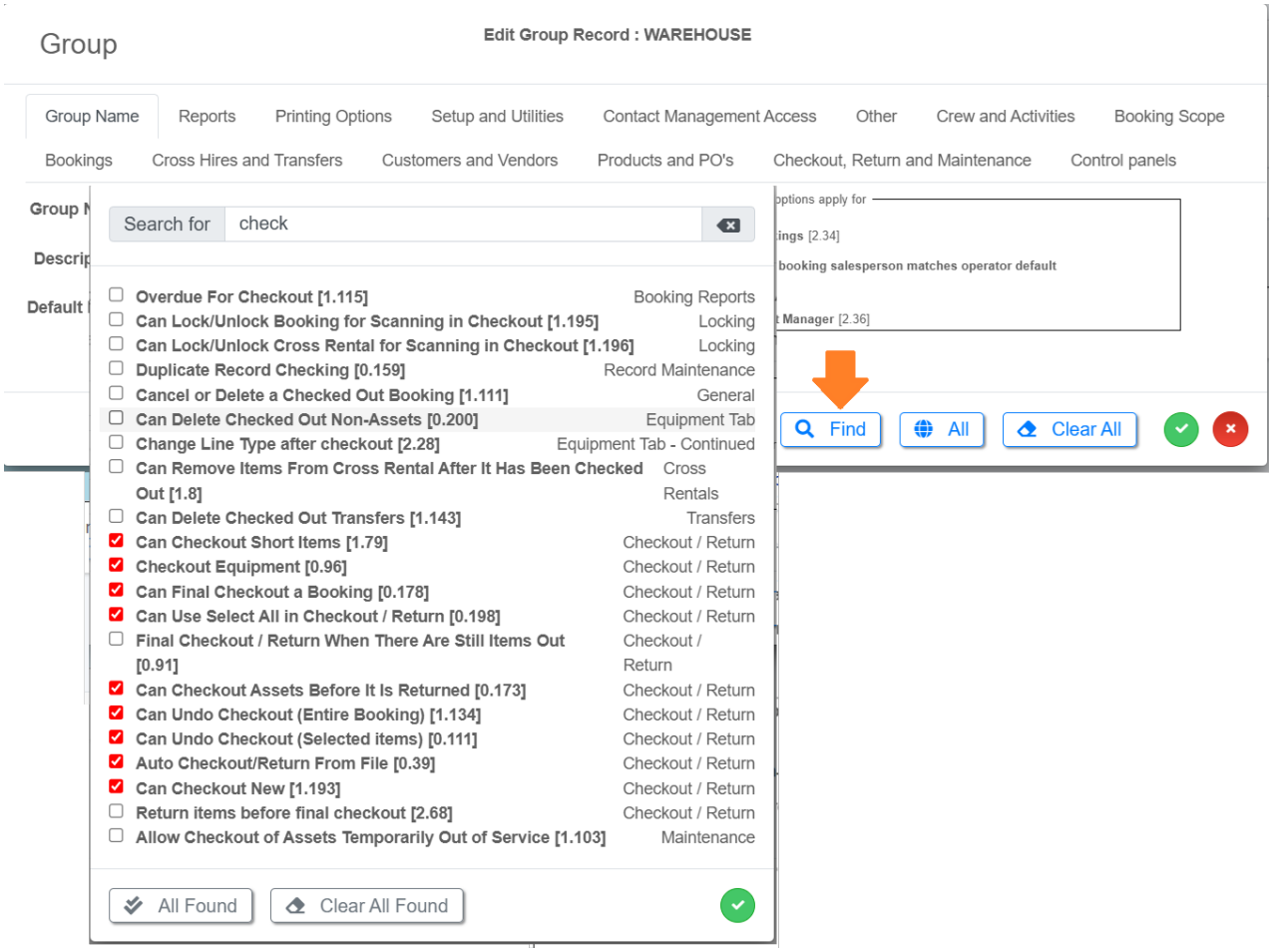
- Default Panel - when users log in the default panel is the panel displayed to the user when they first log in to the software (i.e. Dashboard/Booking Grid/Purchase Order window etc.)
- Auto Emailing options can also be set here for the group




Navigate through the different tabs to assign the group's permitted privileges. Check the box beside each option to allow operators in the group to use that feature. Unchecked options will prevent operators in the group from accessing or using that feature in the software.

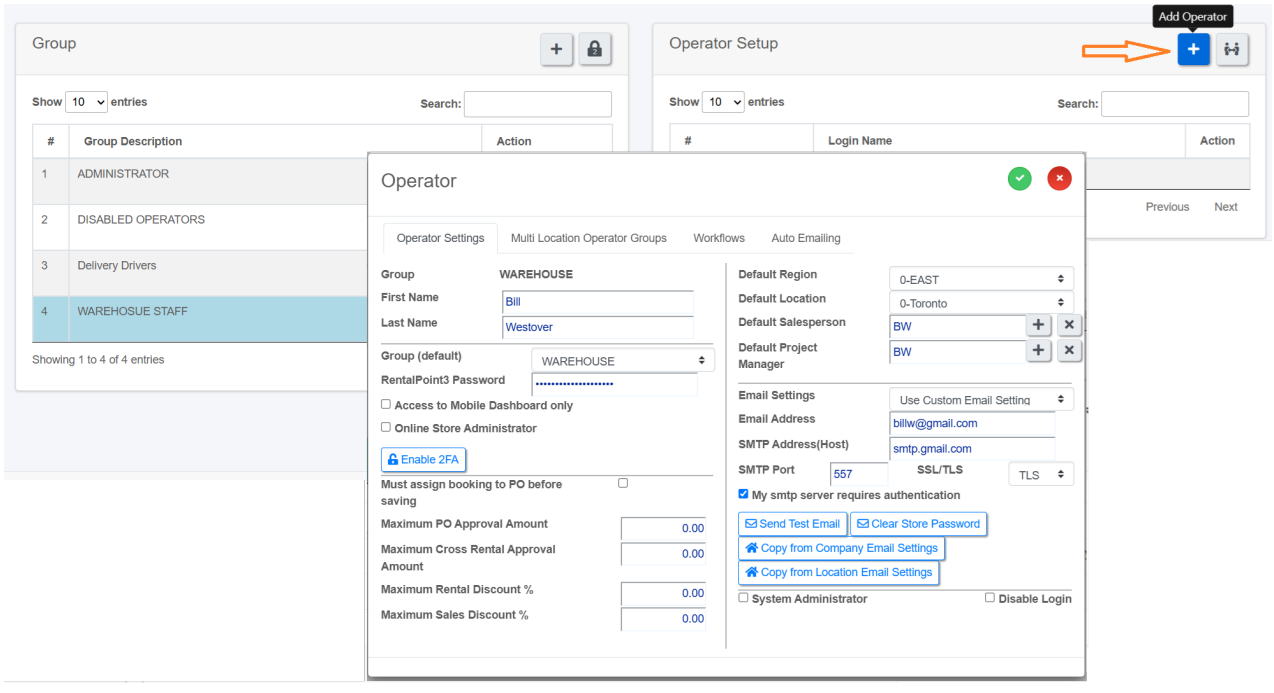



Alternatively, use the find option to search for relevant privileges for the group



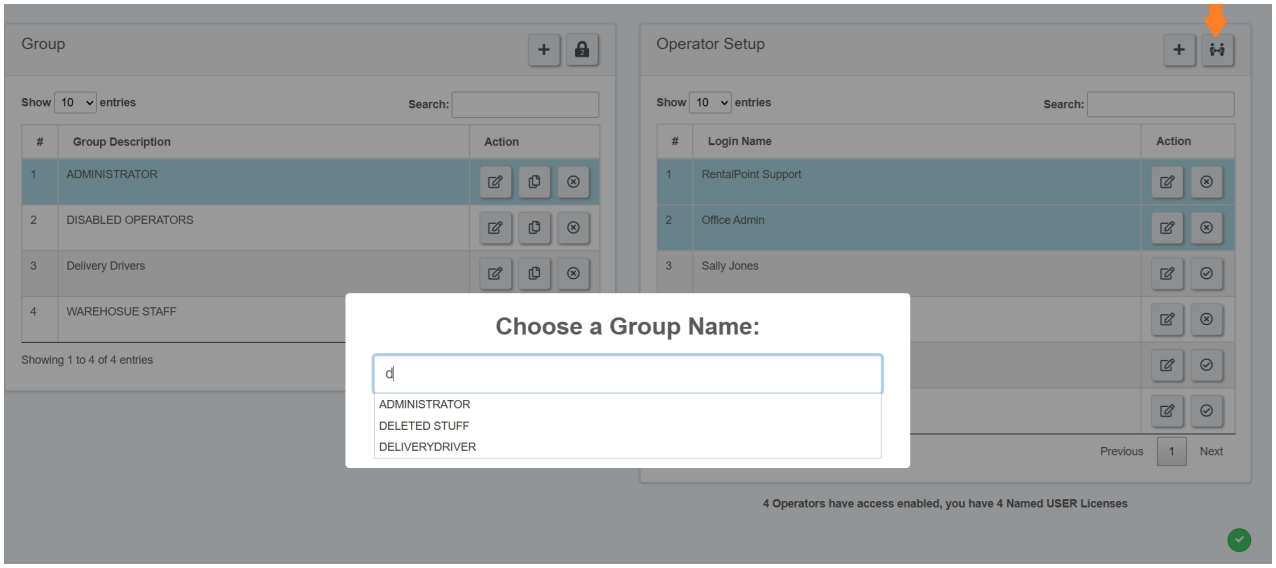

## Operator Setup

Once your operator group is set up, you're ready to add operators.  The email address and RentalPoint3 password entered here will be used by the operator to log into the software.



## Move Operators

Highlight the operators to be moved, then click the move icon and choose a group to move he operators to.




## Enforce 2FA

This option is used in conjunction with the Two Factor Authentication (2FA) feature available in the software

