

The Setup Menu

Last Modified on 14/02/2024 2:41 pm EST

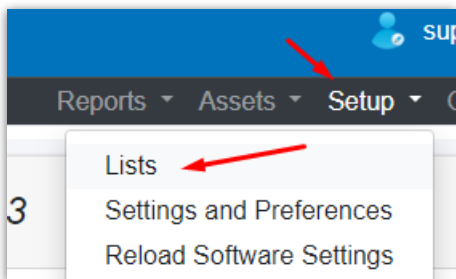
Key information used throughout RentalPoint set up and/or maintained from one convenient menu location.

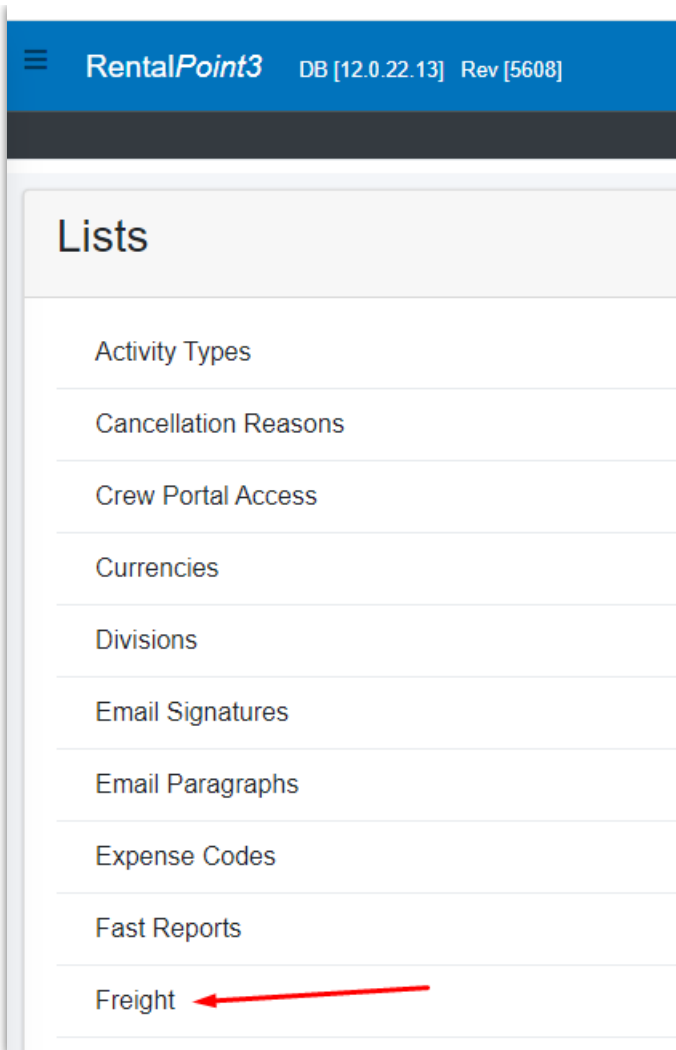
Set Up Tax Authorities

- ⊕ Tax Authorities Defined
- ⊕ Parameters Used in Conjunction with Tax Authorities
- ⊕ Operator Privileges Affecting Tax Authorities
- ⊕ Adding / Editing Tax Authorities
- ⊕ Default Tax Authorities
- ⊕ Changing Default Tax Authorities

Freight Setup

The freight section allows for setup of the various pickup/delivery options offered to clients when booking equipment & services. Shipping costs are calculated against a base rate where the weight of the equipment on the booking can also be considered if entered against product records. Freight is set up outside the booking (usually during initial data setup) and selected during booking entry.





A freight setup window will display where you can enter multiple freight options. RentalPoint allows you to have several services for the one freight type. For example, you may ship using a local courier, so you would enter 'Local' in the description column. The local courier may have different options such as 'Regular', 'Express' or 'Overnight'. Each of these options can be added as a different line in the freight setup. When you select the freight in the booking, the options will be merged together, so you don't see duplicates. This approach provides operators the option of selecting different freight options for different scenarios such as:

- Addressing multiple distances traveled
- Having preferred rates for customers
- Varying levels of priority in shipping

There are several rates that can be set according to weight loaded onto the truck. If weight figures have been entered for your products, RentalPoint will calculate the weight of the booking being loaded onto the truck. Thresholds can be set to charge varying rates based on how much weight is being loaded onto the truck. This option, combined with multiple services gives considerable flexibility in charging for freight.

- Base Rate is used to calculate freight charge up to maximum weight entered
 - with a base rate of 7.5 up with a maximum weight of 10Kg - freight will be calculated at \$75
- Rate Per Unit (RPU) will add an additional charge for each unit above the maximum weight to the next weight threshold

There are also freight defaults that can be specified. When a new booking is created, the defaults will come from here.

Please note, once you have created a Freight item you can rename it but not delete it.

Freight Setup

Search:

#	Description	Service	Our truck	Zone	Base rate	> weight	Rate per unit	> weight	Rate per unit	> weight	Rate per unit	> weight	Rate per unit	> weight	Rate per unit	Action
1	Vendor	N/A	No	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
2	Purolator	N/A	No	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
3	FedEx	N/A	No	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
4	Freight Carrier	N/A	No	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Showing 1 to 8 of 8 entries

[Add New](#) [Insert New](#) [Delete](#) [Enable](#) [Disable](#) [Info](#)

Enable Default Built-in Method

- Del via "we deliver" is default
- Delivery via customer is default
- Return via "we pickup" is default
- Return via customer is default

Now that freights have been added to the system they can be used in the booking.

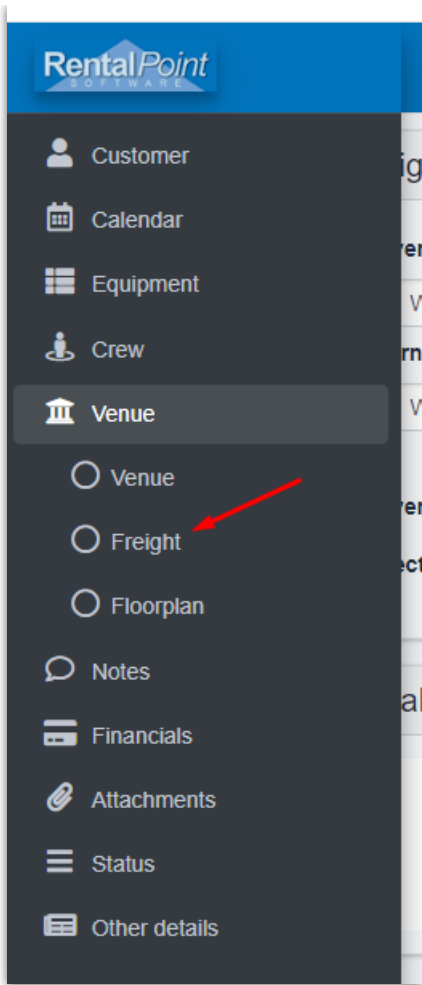
Access freight when editing the booking

RentalPoint **Dashboard** Booking: 999900001

Please select the Tab you would like to work with

- Customer
- Calendar
- Equipment
- Crew
- Technician Hours
- Expenses
- Crew Notes
- Crew Other details
- Venue
- Freight**
- Floor plan
- Notes
- Financials
- Attachments
- Status
- Others

OR from the side menu in the booking



Freight

Delivery via	Service	Zone	<input checked="" type="radio"/> Our number	Total Weight
Vendor	N/A	1	<input type="radio"/> Their number	21.00 lbs
Return via	Service	Zone	<input checked="" type="radio"/> Our number	Total Volume
Vendor	N/A	1	<input type="radio"/> Their number	0.00
				Cubic feet
Delivery Charge				Insurance Value
Collection Charge	400.00			2,488.75
	400.00			

Installation Instructions

Multi Location Setup

[+ What is the Multi Location Module?](#)

[+ Using Multi Locations in RentalPoint](#)

+ USING MULTI-LOCATIONS IN RENTALPOINT

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

+ Locations Setup

+ Regions Setup

Regions

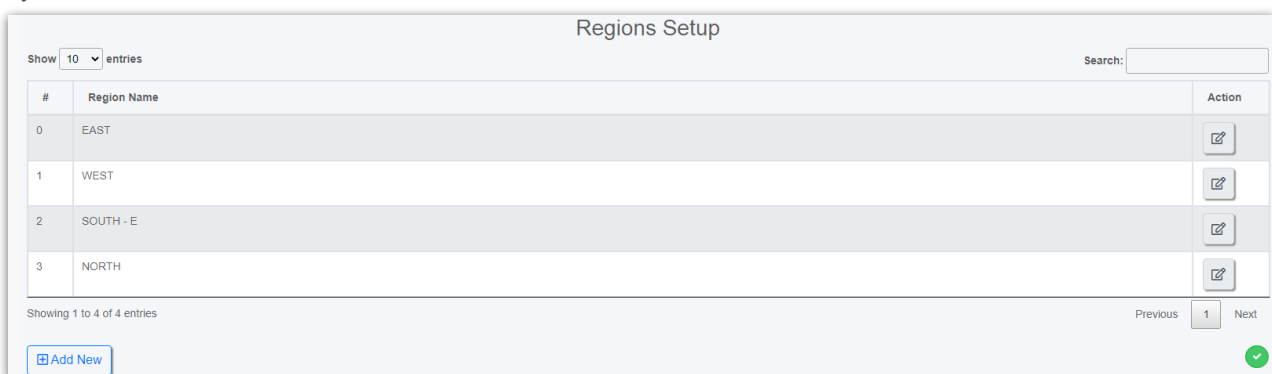
Used in conjunction with Locations, regions are used to group specific locations together. A company with 4 locations, 2 in Eastern Timezone and 2 Pacific Timezone, might create an Eastern and Pacific region, then slot the relevant locations under each region.

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 than 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](#)

[+ Revenue Separation](#)

[+ Customers have default division](#)

[+ Bookings](#)

[⊕ 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](#)

[⊕ Pricing Parameters Explained](#)
