

Transfer Bookings

Last Modified on 01/09/2026 12:55 pm EDT

The transfer functionality is only available if you have the multi-location module. If you are interested in adding this functionality to your license please contact support@rentp.com for more information.

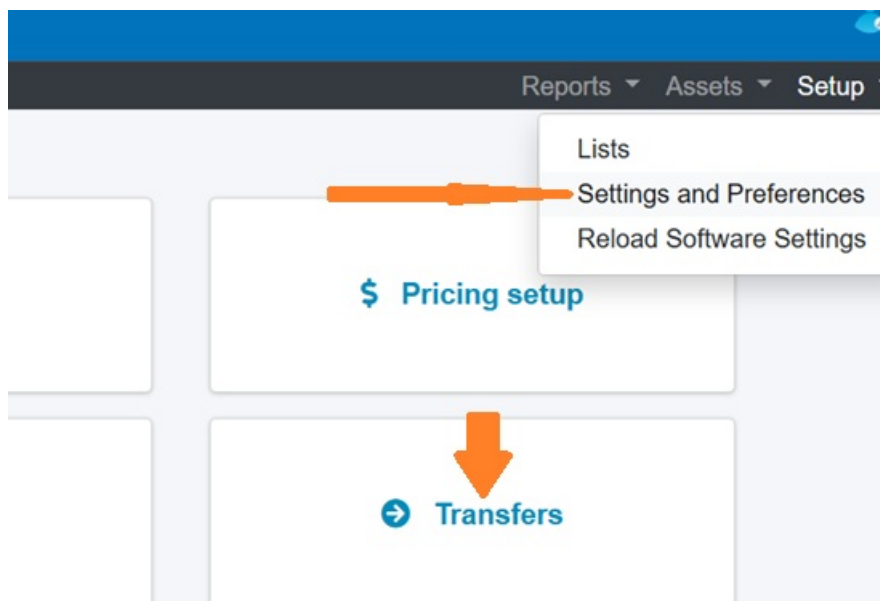
1. Transfers can be created either directly from the Booking grid or from the **Shortages** grid. The **Shortages** grid also provides options to resolve shortages by creating a cross-rental, transfer, or purchase order.
2. If a location has a product shortage and the required product is available at another location, you can create a transfer to move the product from the other location and fulfill the shortage.



Note that transfers don't have the same 'Fixed' option that sub hires do. Other than using the assigned booking's reservation date, transfers go into a pool of stock that you have available for rental at the destination; so there is the possibility of another booking at that location taking precedence over the assigned booking. Use 'Manage Reservations' option to resolve reservation precedence

Transfer Parameters

Transfer options are available under the Transfers section of parameter setup.



Set transfer preferences below as needed

Transfers

×

Lead Time on Delivery

Days

0

Hours

1

Default delivery time, when delivering the day before

900

If equipment out time (from the branch), is before this time, then deliver the day before

1000

Lead Time on Return

Days

0

Hours

1

Default return time, when returning the day after

1200

☒ Assets return to service when checked out or returned from transfer

☒ Transfers are one way only

☐ Rentals are always returned to the same location

☐ Allow Invoicing of Transfers

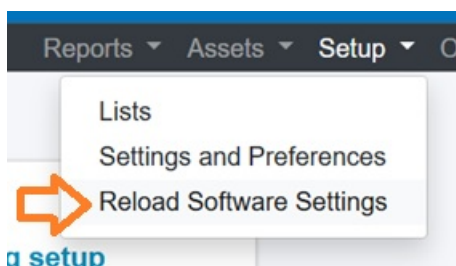
☒ Two way transfers via synchronized one way transfers

Set next trans #

✓

×

Once transfer parameters are set, reload software settings (with all users logged off) to avail of the latest changes



One Way Transfers

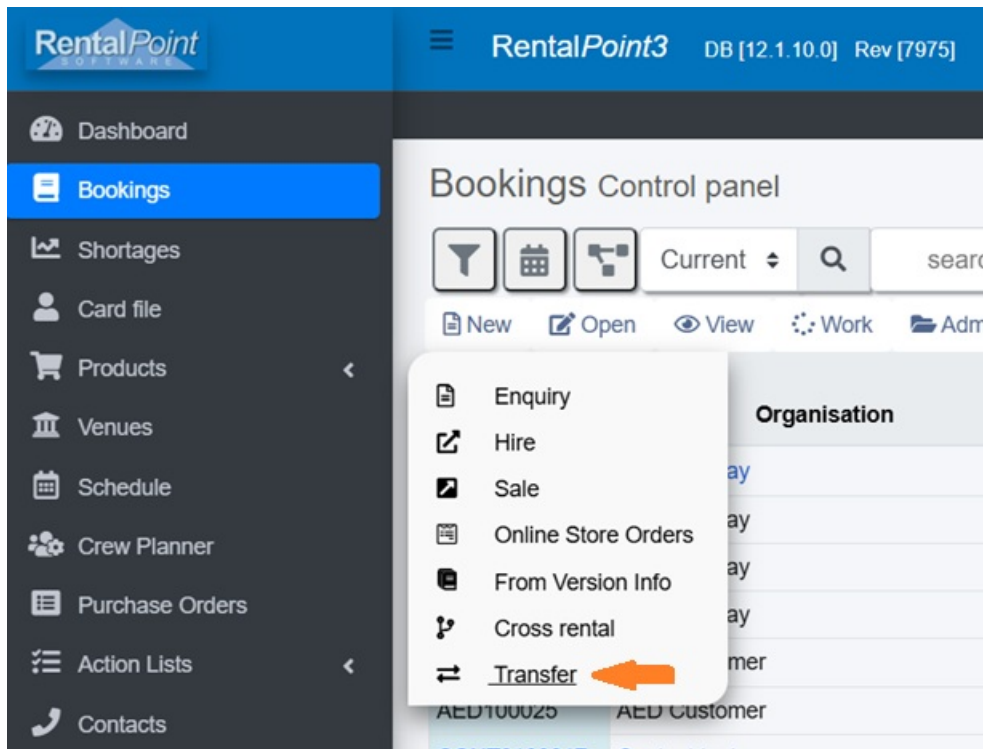
One way transfers are used when equipment is being transferred to another warehouse location permanently (or for an undetermined period of time). When you create a one way transfer, meaning that the equipment will remain in the location it is sent to, the transfer booking will be archived as soon as all the stock has been checked in at the destination and the transfer booking has been final returned.

- Once entered transfer bookings appear in the booking grid
- One way transfers are handled similar to a booking where they have one checkout and return except that the return happens at the destination location.

- If the equipment on the transfer is barcode tracked you need to check out the transfer booking FROM Location A and check it in to Location B.
- Assets being returned will be updated to reflect their new permanent location. If Operational parameter #65 is enabled, asset tracked items (checked out with a barcode) will be moved as soon as they are returned, even if the transfer is not final returned immediately.
- Transfers will archive on final return.
- Once archived the stock quantities in product set-up will be updated to reflect the transfer.

Processing a One Way Transfer

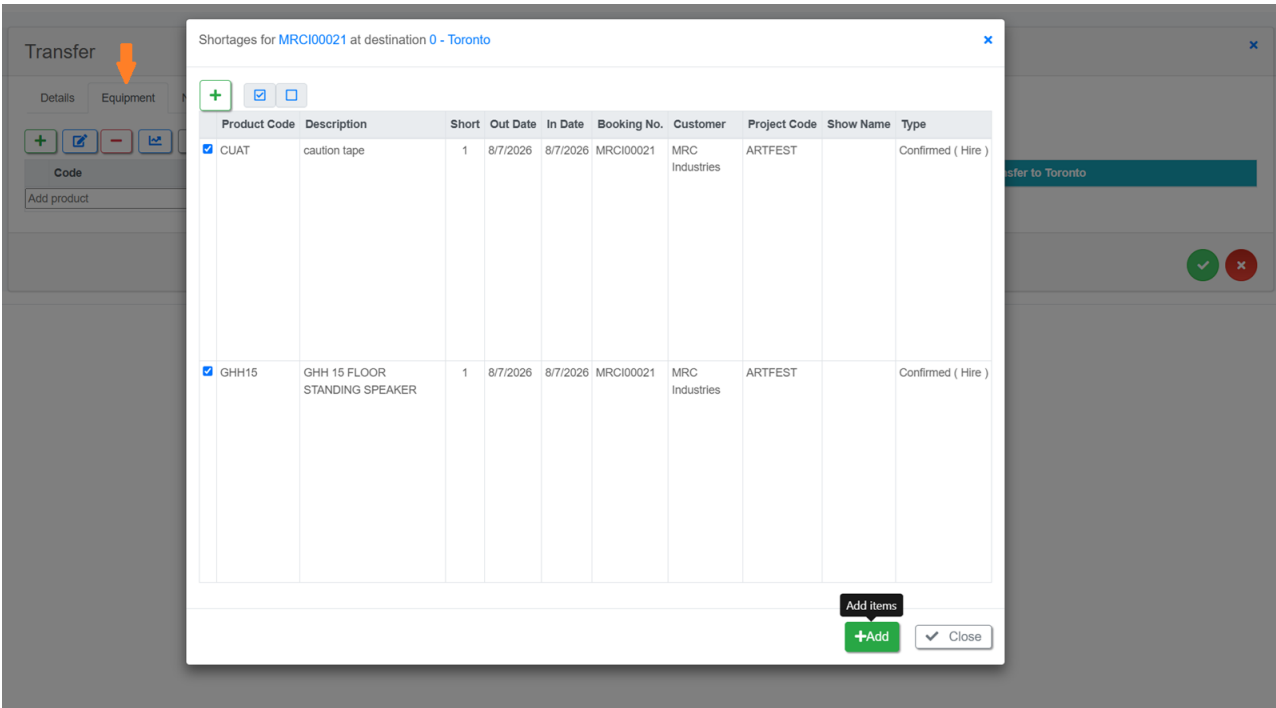
Create a transfer booking from the **Booking Grid**



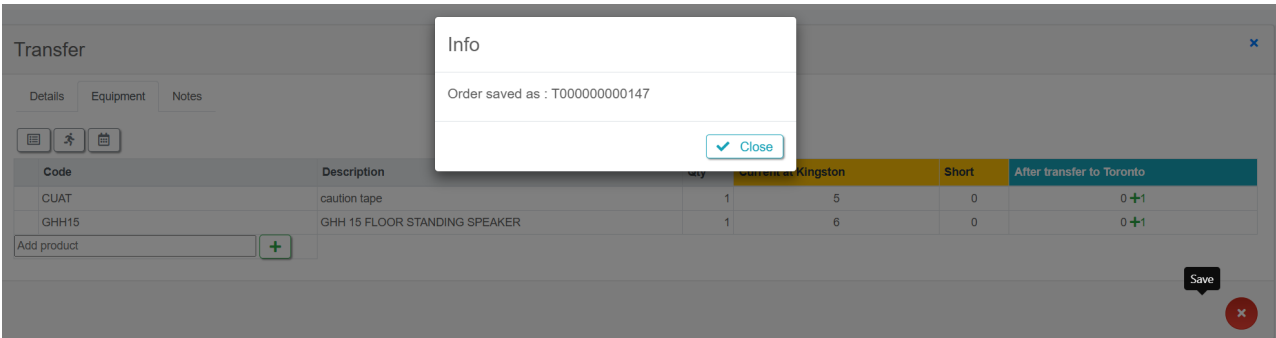
The transfer will automatically be assigned to the current highlighted booking on the grid, this can be useful if you are transferring items that are short on the current booking. Use the 'x' to the right of the booking number to remove the assignment if needed.

 The screenshot shows the 'Transfer' form in the RentalPoint3 software. The form has three tabs: 'Details', 'Equipment', and 'Notes'. The 'Assigned' section on the left lists 'MRCI00021' and 'ARTFEST', each with a trash icon and an 'x' icon. An orange arrow points to the 'x' icon next to 'MRCI00021'. Below this are sections for 'Delivery via' (set to 'We Pickup'), 'Return via' (set to 'We Deliver'), and a 'Ref.' field. The right side of the form is divided into three sections: 'Equipment out' (highlighted in yellow) with 'From' location dropdowns set to '0 - EAST' and '2 - Kingston', and a date/time field set to 'Thu 08/06/2026 09:00 AM'; 'Transfer to' (highlighted in blue) with location dropdowns set to '0 - EAST' and '0 - Toronto'; and 'Arrival' with a date/time field set to 'Fri 08/07/2026 08:00 AM'. At the bottom right are green and red circular buttons with checkmark and 'x' icons respectively.

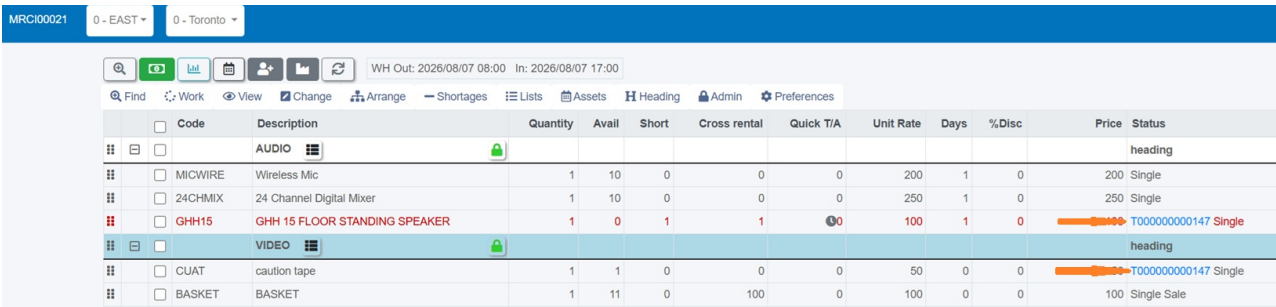
When you access the **Equipment** tab, any equipment shortages for the selected booking are displayed, allowing them to be easily added to the transfer. Simply check the box to the left of any item needed, then '+Add' to continue.



Once the transfer is saved the transfer booking number is assigned and displayed to the user



The transfer booking number is also recorded against the shortage in the assigned booking



The transfer booking is visible on the booking grid once saved and should be checked out at the source location first

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Bookings Control panel

Current search text Booking No.

New Open View Work Admin Financials Print Others

Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Confirmed Status	Invoice #	Project	SL ADM BS	Payment Terms	PO No.	Status Invoiced	Crew Status	Revenue
T000000000147	Assigned to: MRCI00021 2 - Kingston - to - 0 - Toronto		2026/08/06	0900	Fri	2026/08/07	0800	Transfer OUT	Confirmed		ARTFEST	JC : Received - PULL		0	Booked	Not Required	0.00

1 records displayed

Buttons: All, Operator, Project Manager, Location 2 - Kingston

Context menu for Booking T000000000147:

- New
- Open
- View
- Work
- Admin
- Financials
- Print
- Others
- Refresh
- Pick
- Checkout New
- Checkout
- Undo Pick/Checkout
- Return Booking
- Return [find from barcode]
- Return Sales Items
- Enter Losses & Breakages

Transfer T000000000147

0 X GHH15 GHH 15 FLOOR STANDING SPEAKER

1 X 500022 GHH15 GHH 15 FLOOR STANDING SPEAKER

PRESS HERE TO SCAN BARCODES

Description	To do	Needed
CUAT caution tape	0	✓1
GHH15 GHH 15 FLOOR STANDING SPEAKER	0	✓1

Legend: Assign - unit weight, cross rental, bin location, transfer, quick turnaround, in rack

The same booking is visible on the booking grid for the destination location and can be received using the 'Return Booking' option.

SHAW88900040	Shaw County	Mon	2026/07/20	0800	Tue	2026/07/21	1700	Hire	Heavy Panel	JC : Received - PULL	*Cash on delivery	Booked No	Not Required
SHAW88900042	Shaw County	Mon	2026/07/27	0800	Tue	2026/07/28	1700	Hire	Heavy Panel	JC : Received - PULL	*Cash on delivery <td>Booked No</td> <td>Not Required</td>	Booked No	Not Required
SHAW88900043	Shaw County	Mon	2026/07/27	0800	Tue	2026/07/28	1700	Hire	Heavy Panel	JC : Received - PULL	*Cash on delivery <td>Booked No</td> <td>Not Required</td>	Booked No	Not Required
T000000000147	Assigned to: MRCI00021 2 - Kingston - to - 0 - Toronto	Mon	2026/08/07	0800	Transfer IN	Confirmed		ARTFEST	JC : Received - PULL		0	Checked_out	Not Required

Buttons: All, Work, Admin, Salesperson, Project Manager, Location 0 - Toronto

Context menu for Booking T000000000147:

- Pick
- Checkout New
- Checkout
- Undo Pick/Checkout
- Return Booking
- Return [find from barcode]

Items to return

T000000000147

Non-tracked

Code	Description	Out	Return
CUAT	caution tape	1	1
GHH15	GHH 15 FLOOR STANDING SPEAKER	1	1

Returned 500022 GHH 15 FLOOR STANDING SPEAKER

PRESS HERE TO SCAN

Returning T000000000147 to Toronto

Code	Description	Booking
500022	GHH15 GHH 15 FLOOR STANDING SPEAKER x 1	T000000000147

The transfer is moved to the archive table on final return



Tracked assets are moved to the transfer location as soon as they are returned on a transfer booking. Non-tracked items are moved to the transfer location only after the final return has been completed and the transfer booking has been archived.

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Reports Assets Setup Others Help

Bookings Control panel

Archive search text Booking No.

New Open View Work Admin Financials Print Others

Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Confirmed Status	Invoice #	Project	SL ADM BS	Payment Terms	PO No.	Status Invoiced
T000000000147	Assigned to : MRCI00021 2 - Kingston - to - 0 - Toronto	Thu	2026/08/06	0900	Fri	2026/08/07	0800	Transfer IN	Confirmed			JC : Received : PULL		0	Returned

Two Way Transfers

Two way transfers can be used to temporarily lend stock to another location to cover shortages they may have.

- Once entered transfer bookings appear in the booking grid at the source and the destination locations
- Two way transfers only cover shortages within the specified time period of the transfer.
- Although it is not necessary to check out two-way transfers, you can do so if required. Two-way transfers include four checkout and return stages: **checkout from the source location, return at the destination location, checkout from the destination location, and return to the source location.**
- Two way transfers are archived when the booking they are assigned to are archived.
- An assets location is not affected by being checked out and returned from a two way transfer.

To create a two way transfer.....

Create a transfer booking from the **Booking Grid**

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Reports Assets Setup Others Help

Bookings Control panel

Current search text Booking No.

New Open View Work Admin Financials Print Others

- Enquiry
- Hire
- Sale
- Online Store Orders
- From Version Info
- Cross rental
- Transfer**

Organisation	Out	Date	Time	In	Date	Time	Booking type	Confirmed Status	Invoice #	Project	SL ADM BS	Payment Terms	PO No.	Status Invoiced	Crew Status	Revenue
	Mon	2026/07/20	0800	Tue	2026/07/21	1700	Hire	Heavy Pencl			JC : Received : PULL	*Cash on delivery		Booked No	Not Required	0.00 ME M
	Mon	2026/07/20	0800	Tue	2026/07/21	1700	Hire	Heavy Pencl			JC : Received : PULL	*Cash on delivery		Booked No	Not Required	0.00 ME M
	Mon	2026/07/27	0800	Tue	2026/07/28	1700	Hire	Confirmed			JC : Received : PULL	*Cash on delivery		Booked No	Not Required	960.00 ME M
	Mon	2026/07/27	0800	Tue	2026/07/28	1700	Hire	Heavy Pencl			JC : Received : PULL	*Cash on delivery		Booked No	Not Required	110.00 ME M
	Wed	2026/07/29	0800	Wed	2026/07/29	1700	Hire	Heavy Pencl			JC : Received : PULL	*Cash on delivery		Booked No	Not Required	0.00 ME M
SHAW88900046 Shaw County	Wed	2026/07/29	0800	Thu	2026/07/30	1700	Hire	Confirmed			JC : Received : PULL	*Cash on delivery		Booked No	Not Required	110.00 ME M
T000000000148 Assigned to : 2 - Kingston - to - 0 - Toronto	Wed	2026/07/29	0900	Wed	2026/07/29	0900	Transfer IN	Confirmed			JC : Received : PULL		0	Checked_out	Not Required	0.00

14 records displayed.

All Operator Salesperson Project Manager Location 0 - Toronto

The transfer will automatically be assigned to the current highlighted booking on the grid, this can be useful if you are transferring items that are short on the current booking. Use the 'x' to the right of the booking number to remove the assignment if needed.

Use the 'Two Way' tab to enter transfer details since the gear simply on loan from a different location

Transfer

Details

Equipment

Notes

Assigned.

SHAW88900046

enter project #

Delivery via

We Pickup

Return via

We Deliver

Ref.

One way

Two way

Equipment out

From

0 - EAST

2 - Kingston

Tue 07/28/2026 09:00 AM

Transfer to

0 - EAST

0 - Toronto

Return

To

0 - EAST

2 - Kingston

Wed 07/29/2026 07:00 PM

✓

✗

When you access the **Equipment** tab, any equipment shortages for the selected booking are displayed, allowing them to be easily added to the transfer. Simply check the box to the left of any item needed, then '+Add' to continue.

Transfer

Details

Equipment

+

✎

-

↺

Code

Add product

Shortages for SHAW88900046 at destination 0 - Toronto

+

☑

☐

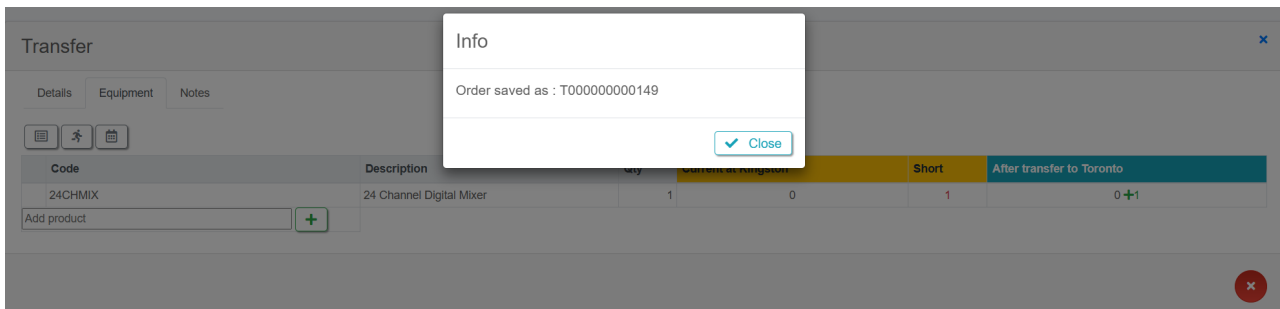
Product Code	Description	Short	Out Date	In Date	Booking No.	Customer	Project Code	Show Name	Type
☒ 24CHMIX	24 Channel Digital Mixer	1	7/29/2026	7/29/2026	SHAW88900046	Shaw County			Confirmed (Hire)

Add items

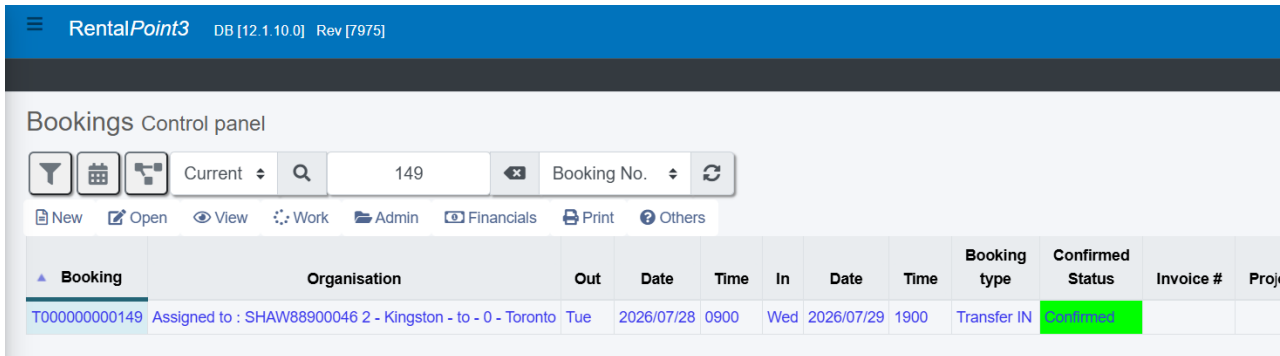
+Add

✓ Close

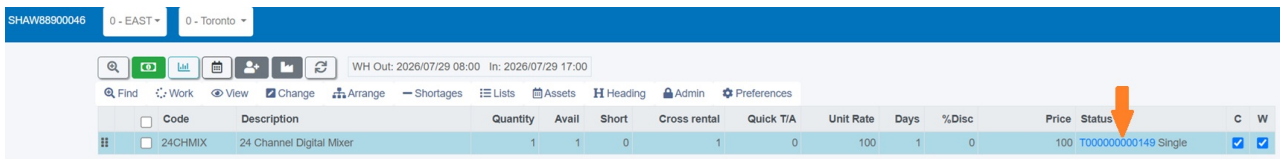
Once the transfer is saved the transfer booking number is assigned and displayed to the user



The transfer booking is then visible on the Booking Grid showing the booking (if any) it's assigned to.

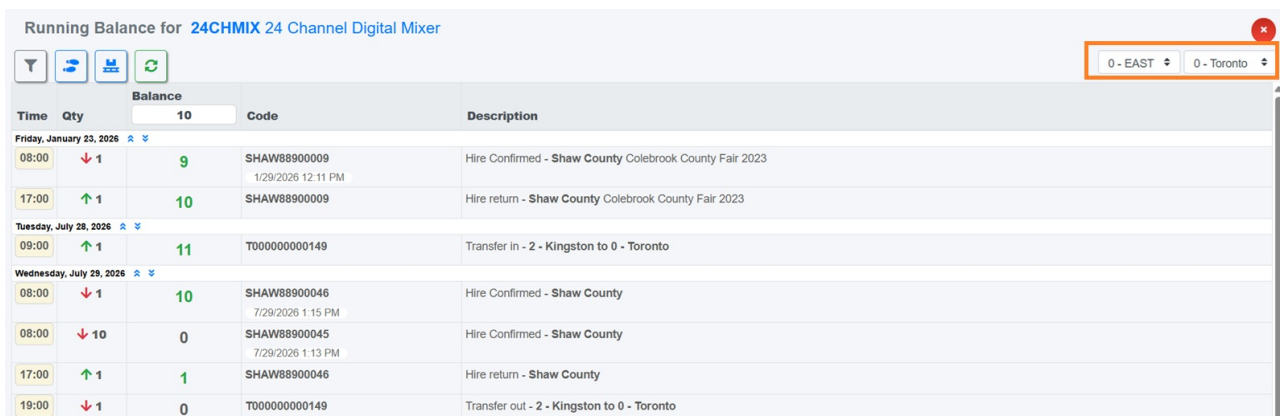


The equipment grid of the assigned booking also shows the transfer resolving the shortage of the transfer item



Tracking a Two Way Transfer

The transfer is displayed in the products Running Balance at both locations showing the increase and decrease in stock as the item on the transfer moves in and out of each location. There is no need to check out and return a two way transfer since the stock is not permanently moving.



Running Balance for **24CHMIX 24 Channel Digital Mixer**

0 - EAST 2 - Kingston

Time	Qty	Balance	Code	Description
Tuesday, July 28, 2026				
09:00	↓ 1	1	T000000000149	Transfer out - 2 - Kingston to 0 - Toronto
Wednesday, July 29, 2026				
19:00	↑ 1	2	T000000000149	Transfer in - 2 - Kingston to 0 - Toronto

Transfers, Shortages & Operator Privileges

- When you enter a transfer to move equipment to a certain location, the stock will immediately become available at the destination.
- At the source they transfer may or may not create a shortage and this will need to be managed by those at the source location. You may check/uncheck the operator privilege in red below to allow/prevent transfers that will create a shortage at the 'transfer from' location.
- The screenshot below highlights the operator privileges available for processing transfers. Speak to your systems administrator if you don't have access to these options.

Group Edit Group Record : ADMINISTRATOR

Group Name Reports Printing Options Setup and Utilities Contact Management Access Other Crew and Activities Booking Scope
Bookings Cross Hires and Transfers Customers and Vendors Products and PO's Checkout, Return and Maintenance Control panels

Cross Rentals

- ☒ Create New Sub / Cross Rental [0.42]
- ☒ Modify Cross Rental [0.25]
- ☒ Delete Sub / Cross Rental [1.32]
- ☒ Can Remove Items From Cross Rental [1.9]
- ☒ Can Remove Items From Cross Rental After It Has Been Checked Out [1.8]
- ☒ Can Duplicate Cross Rental [1.146]
- ☒ Cross Rentals to be Picked Up [0.20]
- ☒ Can re-assign a sub rental when the main booking is in out status [1.180]
- ☒ Can cancel Sub rental [0.22]
- ☒ Can select all items to cross rent (Shortage Resolution) [2.30]
- ☒ Mark equipment as sub hire prior to raising PO [2.7]

Transfers

- ☒ Can Create New Transfer [0.104]
- ☒ Modify a Transfer [0.23]
- ☒ Can View Transfers [0.109]
- ☒ Can Delete Transfers [1.133]
- ☒ Can Delete Checked Out Transfers [1.143]
- ☒ Can Duplicate Transfers [1.147]
- ☒ Can Override Product Option "Do not transfer" [1.158]
- ☒ Can transfer items that are short at source location [2.6]
- ☒ Can remove one way transfer sync [2.27]

🌐 All in tab 🗑️ Clear All in tab

🔍 Find 🌐 All 🗑️ Clear All ✅ ❌

Synchronized Two Way Transfers

The option to use synchronized transfers is activated in the Transfer parameter window by checking the box below

☒ **Two way transfers via synchronized one way transfers**

A synchronized transfer consists of two one-way transfers. The first transfer is created from the source location to the destination location. A second transfer is then automatically created and synchronized with the first to return the equipment to the source location after use.

Check the 'Create Return Transfer' option if a return transfer is needed.

Transfer

Details
Equipment
Notes

Assigned.

Delivery via

We Pickup

Return via

We Deliver

Ref.

☒ Create Return Transfer

Equipment out

From

0 - EAST
Select location

2 - Kingston

Wed
07/29/2026
09:00 AM

Transfer to

0 - EAST

0 - Toronto

Arrival

Thu
07/30/2026
10:00 AM

Both the original transfer and the return transfer associated with it can be viewed in the **Booking** grid at both locations involved in the transfer.

Source location:

RentalPoint3
DB [12.1.10.0] Rev [7975]
mandy@rentp.com

Reports
Assets
Setup
Others
Help

Bookings Control panel

Current

Booking No.

Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Confirmed Status	Invoice #	Project	SL ADM BS	Payment Terms	PO No.	Status Invoiced	Crew Status
T000000000152	Assigned to : 2 - Kingston - to - 0 - Toronto	Wed	2026/07/29	0900	Thu	2026/07/30	1306	Transfer OUT Synced Out	Confirmed			JC - Received - PULL	0		Returned	Not Re
T000000000153	Assigned to : T000000000152 0 - Toronto - to - 2 - Kingston	Thu	2026/07/30	1200	Thu	2026/07/30	1300	Transfer IN Synced Return	Confirmed			JC - Received - PULL	0		Booked	Not Re

2 records displayed.

Destination Location:

RentalPoint3
DB [12.1.10.0] Rev [7975]
mandy@rentp.com

Reports
Assets
Setup
Others
Help

Bookings Control panel

Current

Booking No.

Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Confirmed Status	Invoice #	Project	SL ADM BS	Payment Terms	PO No.	Status Invoiced	Crew Status
T000000000152	Assigned to : 2 - Kingston - to - 0 - Toronto	Wed	2026/07/29	0900	Thu	2026/07/30	1306	Transfer IN Synced Out	Confirmed			JC - Received - PULL	0		Returned	Not Re
T000000000153	Assigned to : T000000000152 0 - Toronto - to - 2 - Kingston	Thu	2026/07/30	1200	Thu	2026/07/30	1300	Transfer OUT Synced Return	Confirmed			JC - Received - PULL	0		Booked	Not Re

2 records displayed.

Check out the transfer (in this example, **T000000000152**) from the source location,

Bookings Control panel

Current 15 Booking No. 15

New Open View Work Admin Financials Print Others

Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Confirmed Status	Invoice #	Project	SL ADM BS	Payment Terms	PO
T000000000152	Assigned to : 2 - Kingston - to - 0 - Toronto	Wed	2026/07/29	0900	Thu	2026/07/30	1306	Transfer OUT Synced Out	Confirmed			JC - Received - PULL	0	
T000000000153	Assigned to : T000000000152	Thu	2026/07/30	1200	Thu	2026/07/30	1300	Transfer IN Synced Return	Confirmed			JC - Received - PULL	0	

2 records displayed

All

Work

- Pick
- Checkout New
- Checkout
- Undo Pick/Checkout

Project Manager

Location 2 - Kingston

then use the **Return** option to receive it at the destination location.

RentalPoint3 DB [12.1.10.0] Rev [7975]

Bookings Control panel

Current 15 Booking No. 15

New Open View Work Admin Financials Print Others

Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Confirmed Status	Invoice #	Project	SL ADM BS	Payment Terms	P
T000000000152	Assigned to : 2 - Kingston - to - 0 - Toronto	Wed	2026/07/29	0900	Thu	2026/07/30	1306	Transfer IN Synced Out	Confirmed			JC - Received - PULL	0	
T000000000153	Assigned to : T000000000152 0 - Toronto	Thu	2026/07/30	1200	Thu	2026/07/30	1300	Transfer OUT Synced Return	Confirmed			JC - Received - PULL	0	

2 records displayed

All

Work

- Pick
- Checkout New
- Checkout
- Undo Pick/Checkout
- Return Booking

Project Manager

Location 0 - Toronto

When the equipment is ready to be returned, check out the **Transfer OUT** booking (in this example, **T000000000153**) from the destination location,

RentalPoint3 DB [12.1.10.0] Rev [7975]

Bookings Control panel

Current 15 Booking No. 15

New Open View Work Admin Financials Print Others

Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Confirmed Status	Invoice #	Project	SL ADM BS	Payment Terms	
T000000000152	Assigned to : 2 - Kingston - to - 0 - Toronto	Wed	2026/07/29	0900	Thu	2026/07/30	1306	Transfer IN Synced Out	Confirmed			JC - Received - PULL	0	
T000000000153	Assigned to : T000000000152 0 - Toronto - to - 2 - Kingston	Thu	2026/07/30	1200	Thu	2026/07/30	1300	Transfer OUT Synced Return	Confirmed			JC - Received - PULL	0	

2 records displayed

All

Work

- Pick
- Checkout New
- Checkout

Project Manager

Location 0 - Toronto

then use the **Return** option to receive it back at the original source location, completing the transfer.

RentalPoint3

DB [12.1.10.0]

Rev [7975]

Reports

Assets

Setup

Bookings Control panel

Current

15

Booking No.

New

Open

View

Work

Admin

Financials

Print

Others

Booking	Organisation	Out	Date	Time	In	Date	Time	Booking type	Confirmed Status	Invoice #	Project	SL ADM BS	Payment Terms	PC
T000000000152	Assigned to : 2 - Kingston - to - 0 - Toronto	Wed	2026/07/29	0900	Thu	2026/07/30	1306	Transfer OUT Synced Out	Confirmed			JG : Received : FULL		0
T000000000153	Assigned to : T000000000152 0 - Toronto - to - 2 - Kingston	Thu	2026/07/30	1300	Thu	2026/07/30	1300	Transfer IN Synced Return	Confirmed			JG : Received : FULL		0

New

Open

View

Work

Admin

Financials

Print

Others

Pick

Checkout New

Checkout

Undo Pick/Checkout

Return Booking

2 records displayed.

All

Open

Project Manager

Location 2 - Kingston

Synchronized transfers are archived automatically on final return of the synchronized transfer at the source location.