

RentalPoint Operators

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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.

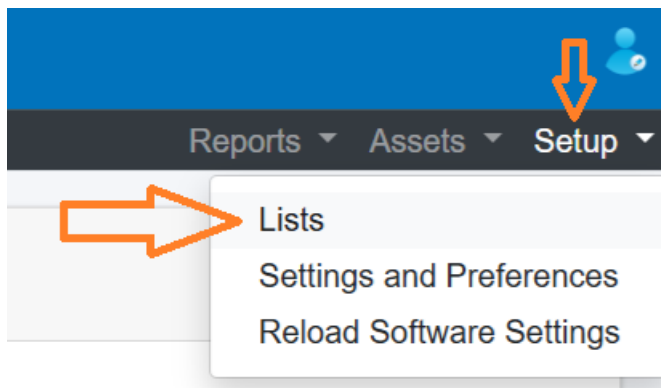
To configure operator security:

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

Group




Show 10 entries
Search:

#	Group Description	Action
1	ADMINISTRATOR	  
2	DISABLED OPERATORS	  
3	Delivery Drivers	  

Showing 1 to 3 of 3 entries

Previous
1
Next

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

Group

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

Group Name

WAREHOUSE

Description

WAREHOSUE STAFF

Default Panel

Dashboard



Auto-emailing options apply for

☐ All Bookings [2.34]
☐ Where booking salesperson matches operator default [2.35]
☐ Project Manager [2.36]

Find
All
Clear All




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.

Group

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

Checkout / Return

☒ Late Returns [0.10]
☒ Can Checkout Short Items [1.79]
☒ Enter Losses and Breakages [0.47]
☒ Move Items To / From Cross Rent Grid [0.199]
☒ Checkout Equipment [0.96]
☒ Can Return Unused Equipment [0.110]
☒ Change IN / OUT Dates After Return [0.170]
☒ Can Final Return a Booking [0.171]
☒ Can Final Checkout a Booking [0.178]
☒ Direct Asset Transfer [0.184]
☒ Return Sales Items [0.176]
☒ Can Use Select All in Checkout / Return [0.198]
☐ Final Checkout / Return When There Are Still Items Out [0.91]
☒ Can Checkout Assets Before It Is Returned [0.173]
☒ Can Undo Checkout (Entire Booking) [1.134]
☒ Can Undo Checkout (Selected items) [0.111]
☒ Can Use Open Return and Project Return [1.21]
☐ Open Pick when booking open [1.38]
☒ Auto Checkout/Return From File [0.39]
☒ Can Checkout New [1.193]
☐ Can use RFID scanner [2.17]
☐ Return items before final checkout [2.68]

Maintenance

☒ Enter Maintenance Costs [0.24]
☒ Manually Enter Asset Test Results [1.51]
☐ Allow Checkout of Assets Temporarily Out of Service [1.103]
☒ Can Return Items From Booking Directly Into Maintenance [1.132]
☒ Allow Assets to be set to permanently out of service [2.33]

Roadcases / Racks
☒ Pack Roadcase [0.194]
☒ Unpack Roadcase [0.195]

Other
☐ Must Login to Restricted Areas [1.190]

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

Group

Edit Group Record : WAREHOUSE

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

Group Name: Search for

Default: ☐ Overdue For Checkout [1.115] Booking Reports

☐ Can Lock/Unlock Booking for Scanning in Checkout [1.195] Locking

☐ Can Lock/Unlock Cross Rental for Scanning in Checkout [1.196] Locking

☐ Duplicate Record Checking [0.159] Record Maintenance

☐ Cancel or Delete a Checked Out Booking [1.111] General

☐ Can Delete Checked Out Non-Assets [0.200] Equipment Tab

☐ Change Line Type after checkout [2.28] Equipment Tab - Continued

☐ Can Remove Items From Cross Rental After It Has Been Checked Out [1.8] Cross

☐ Can Delete Checked Out Transfers [1.143] Rentals

☒ Can Checkout Short Items [1.79] Transfers

☒ Checkout Equipment [0.96] Checkout / Return

☒ Can Final Checkout a Booking [0.178] Checkout / Return

☒ Can Use Select All in Checkout / Return [0.198] Checkout / Return

☐ Final Checkout / Return When There Are Still Items Out [0.91] Checkout / Return

☒ Can Checkout Assets Before It Is Returned [0.173] Checkout / Return

☒ Can Undo Checkout (Entire Booking) [1.134] Checkout / Return

☒ Can Undo Checkout (Selected items) [0.111] Checkout / Return

☒ Auto Checkout/Return From File [0.39] Checkout / Return

☒ Can Checkout New [1.193] Checkout / Return

☐ Return items before final checkout [2.68] Checkout / Return

☐ Allow Checkout of Assets Temporarily Out of Service [1.103] Maintenance

options apply for:

Find All Clear All ☒ ☐

All Found Clear All Found ☒

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.

Group:

Operator Setup:

Show 10 entries Search:

#	Group Description	Action
1	ADMINISTRATOR	
2	DISABLED OPERATORS	
3	Delivery Drivers	
4	WAREHOUSE STAFF	

Showing 1 to 4 of 4 entries

Operator:

Operator Settings Multi Location Operator Groups Workflows Auto Emailing

Group: WAREHOUSE

First Name:

Last Name:

Group (default):

RentalPoint3 Password:

☐ Access to Mobile Dashboard only

☐ Online Store Administrator

☒ Enable 2FA

Must assign booking to PO before saving: ☐

Maximum PO Approval Amount:

Maximum Cross Rental Approval Amount:

Maximum Rental Discount %:

Maximum Sales Discount %:

Default Region:

Default Location:

Default Salesperson:

Default Project Manager:

Email Settings:

Email Address:

SMTP Address(Host):

SMTP Port:

SSL/TLS:

☒ My smtp server requires authentication

☒ Send Test Email ☒ Clear Store Password

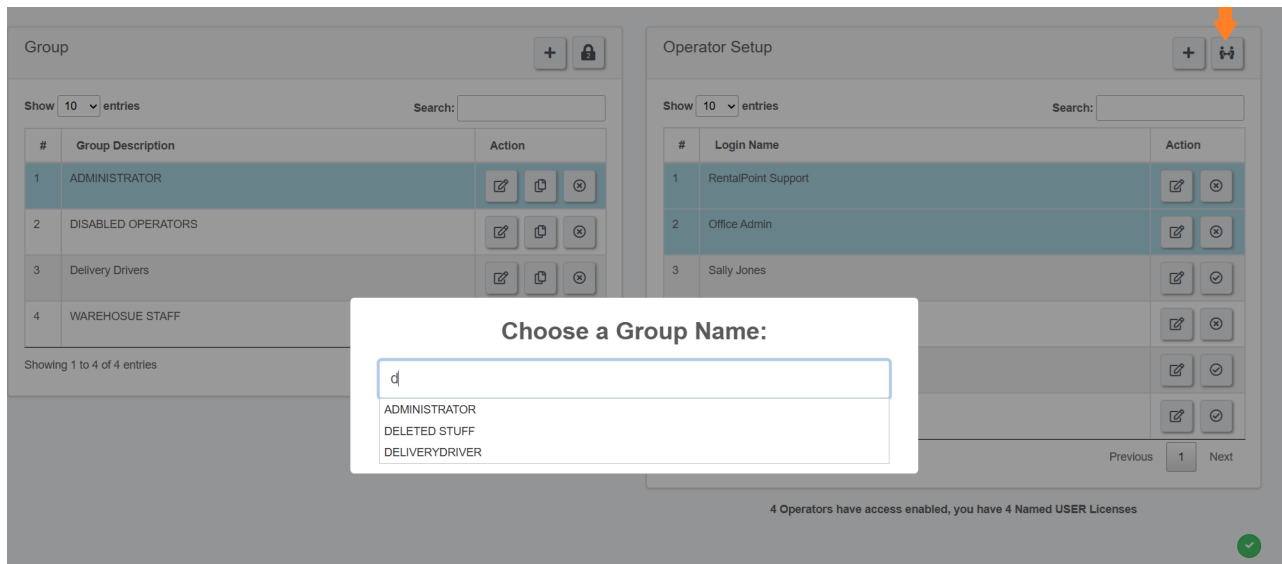
☒ Copy from Company Email Settings

☒ Copy from Location Email Settings

☐ System Administrator ☐ Disable Login

Move Operators

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



Enforce 2FA

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

