



## Manage Reservations

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## Manage Reservations

### 1. What is Manage Reservations?

The RentalPoint availability system has two main settings; First Come First Served (FCFS) and Pooled Stock (PS). The setting that you use depends on your company workflow. When using FCFS, bookings receive stock in the order in which the items were reserved; the Reservation Date. This date may or may not be the same as the Warehouse Out Date. At times it may be necessary to change the priority of a product so a booking receives stock before other bookings. You can change the priority of a product by changing the Reservation Date via the Manage Reservation utility.

 FCFS is configured via Operational #6.

### 2. What's the difference between the Running Balance and Manage Reservations?

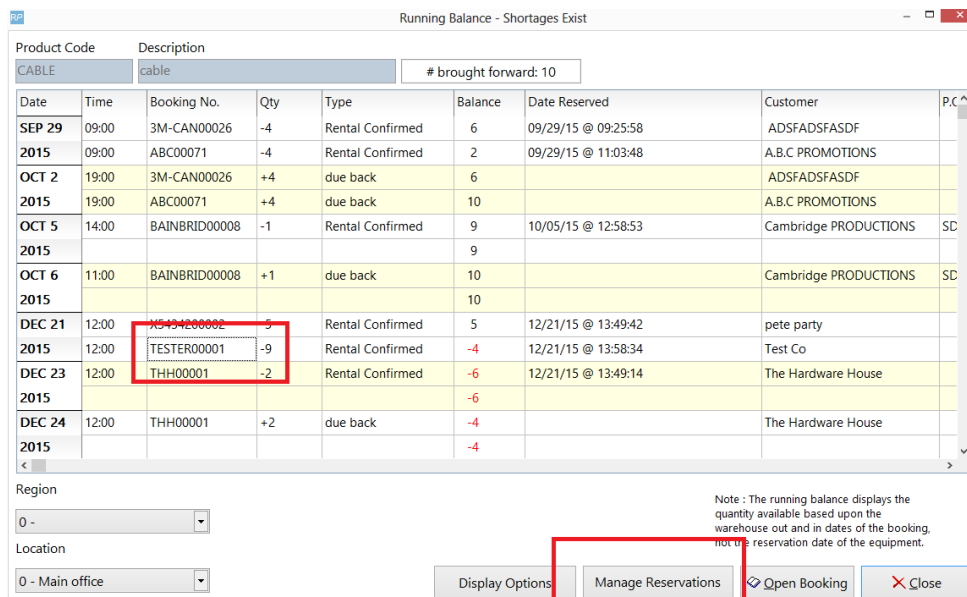
The Running Balance displays bookings by the Warehouse Out Date. Although it still displays predicted shortages it does not provide you with the level of detail you need to make a decision on stock levels. The Manage Reservations window displays bookings by Reservation Date and allows you to change the Reservation Date.

Manage Reservations can be used to adjust the priority of particular products or entire bookings. For instance, a product that's out for a day may be a better choice to cross rent than a product that's out for a week.

### 3. How do I access Manage Reservations?

#### 3.1 Accessing Manage Reservations

To access the Manage Reservation window you'll need to open the Running Balance. Within the Running Balance, select the booking that you want to resolve shortages for and then click **Manage Reservations**.



Date	Time	Booking No.	Qty	Type	Balance	Date Reserved	Customer	P.C.
SEP 29	09:00	3M-CAN00026	-4	Rental Confirmed	6	09/29/15 @ 09:25:58	ADSFADSFASDF	
2015	09:00	ABC00071	-4	Rental Confirmed	2	09/29/15 @ 11:03:48	A.B.C PROMOTIONS	
OCT 2	19:00	3M-CAN00026	+4	due back	6		ADSFADSFASDF	
2015	19:00	ABC00071	+4	due back	10		A.B.C PROMOTIONS	
OCT 5	14:00	BAINBRID00008	-1	Rental Confirmed	9	10/05/15 @ 12:58:53	Cambridge PRODUCTIONS	SD
2015					9			
OCT 6	11:00	BAINBRID00008	+1	due back	10		Cambridge PRODUCTIONS	SD
2015					10			
DEC 21	12:00	TESTER00001	-5	Rental Confirmed	5	12/21/15 @ 13:49:42	pete party	
2015	12:00	TESTER00001	-9	Rental Confirmed	-4	12/21/15 @ 13:58:34	Test Co	
DEC 23	12:00	THH00001	-2	Rental Confirmed	-6	12/21/15 @ 13:49:14	The Hardware House	
2015					-6			
DEC 24	12:00	THH00001	+2	due back	-4		The Hardware House	
2015					-4			


Region: 0 - Location: 0 - Main office

Buttons: Display Options, Manage Reservations, Open Booking, Close

Note: The running balance displays the quantity available based upon the warehouse out and in dates of the booking, not the reservation date of the equipment.

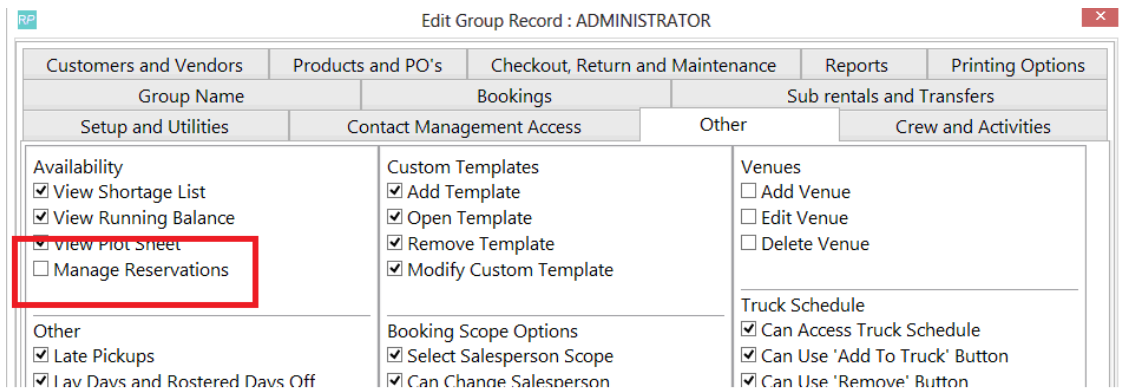


## Manage Reservations

 Running Balance -- <http://rentp.com/KnowledgebasePDFs/Running%20Balance.pdf>

### 3.2 Operator Privilege

The Manage Reservation window is also controlled by an operator privilege.



RP Edit Group Record : ADMINISTRATOR

Customers and Vendors	Products and PO's	Checkout, Return and Maintenance	Reports	Printing Options
Group Name		Bookings		Sub rentals and Transfers
Setup and Utilities	Contact Management Access		Other	Crew and Activities
<b>Availability</b> <input checked="" type="checkbox"/> View Shortage List <input checked="" type="checkbox"/> View Running Balance <input checked="" type="checkbox"/> <b>View Plot Sheet</b> <input type="checkbox"/> Manage Reservations	<b>Custom Templates</b> <input checked="" type="checkbox"/> Add Template <input checked="" type="checkbox"/> Open Template <input checked="" type="checkbox"/> Remove Template <input checked="" type="checkbox"/> Modify Custom Template	<b>Venues</b> <input type="checkbox"/> Add Venue <input type="checkbox"/> Edit Venue <input type="checkbox"/> Delete Venue	<b>Truck Schedule</b> <input checked="" type="checkbox"/> Can Access Truck Schedule <input checked="" type="checkbox"/> Can Use 'Add To Truck' Button <input checked="" type="checkbox"/> Can Use 'Remove' Button	
<b>Other</b> <input checked="" type="checkbox"/> Late Pickups <input checked="" type="checkbox"/> Lav Davs and Rostered Davs Off	<b>Booking Scope Options</b> <input checked="" type="checkbox"/> Select Salesperson Scope <input checked="" type="checkbox"/> Can Change Salesperson			



## Manage Reservations

### 4. How do I use Manage Reservations?

#### 4.1 Manage Items Tab

The **Manage Items** tab lists all bookings that overlap the warehouse dates of the booking you selected in the Running Balance. These bookings affect the availability of your product.

Following our example, the original booking is TESTER000001. As you can see, this booking is short and there are three bookings that have priority (that get stock first) even though they may leave the warehouse at a later date.

Qty Booked	Qty Available	Qty Short	Booking	Date Reserved	Warehouse Out	Warehouse In	Assigned To	Quantity Ou	Quant
2	10	0	THH00001	Dec 21 2015 @ 13:49:14	Dec 23 2015 @ 12:00	Dec 24 2015 @ 12:00 (1 day)		0	0
5	8	0	X5434200002	Dec 21 2015 @ 13:49:42	Dec 21 2015 @ 12:00	Dec 31 2015 @ 12:00 (10 days)		0	0
4	10	0	T000000000054	Dec 21 2015 @ 13:56:40	Jan 27 2016 @ 09:00	Sent to Las Vegas		0	0
9	3	6	TESTER00001	Dec 21 2015 @ 13:58:34	Dec 21 2015 @ 12:00	Jan 29 2016 @ 12:00 (39 days)		0	0
4	1	3	FASDF00001	Dec 21 2015 @ 13:59:3	Jan 18 2016 @ 12:00	Jan 23 2016 @ 12:00 (5 days)		0	0
6	0	6	CHER300002	Dec 21 2015 @ 13:59:40	Jan 12 2016 @ 12:00	Jan 20 2016 @ 12:00 (8 days)		0	0

#### 4.2 Switch Reservations

To switch the reservation order of two bookings, click in the left column to select a row. Then select another row and click **Switch Reservations**. This swaps the reservation dates of the two selected bookings.

Qty Booked	Qty Available	Qty Short	Booking	Date Reserved	Warehouse Out	Warehouse In	Ass
> 2	10	0	THH00001	Dec 21 2015 @ 13:49:14	Dec 23 2015 @ 12:00	Dec 24 2015 @ 12:00 (1 day)	
5	8	0	X5434200002	Dec 21 2015 @ 13:49:42	Dec 21 2015 @ 12:00	Dec 31 2015 @ 12:00 (10 days)	
4	10	0	T000000000054	Dec 21 2015 @ 13:56:40	Jan 27 2016 @ 09:00	Sent to Las Vegas	
> 9	3	6	TESTER00001	Dec 21 2015 @ 13:58:34	Dec 21 2015 @ 12:00	Jan 29 2016 @ 12:00 (39 days)	
4	1	3	FASDF00001	Dec 21 2015 @ 13:59:3	Jan 18 2016 @ 12:00	Jan 23 2016 @ 12:00 (5 days)	
6	0	6	CHER300002	Dec 21 2015 @ 13:59:40	Jan 12 2016 @ 12:00	Jan 20 2016 @ 12:00 (8 days)	

Hide 'Out' Bookings

After switching the reservation dates the TESTER000001 booking no longer has a shortage and the THH000001 booking is short. Also, since there were more items booked on TESTER000001 the other two bookings that used to be above it are now short as well.

Qty Booked	Qty Available	Qty Short	Booking	Date Reserved	Warehouse Out	Warehouse In	Ass
9	10	0	TESTER00001	Dec 21 2015 @ 13:49:14	Dec 21 2015 @ 12:00	Jan 29 2016 @ 12:00 (39 days)	
5	1	4	X5434200002	Dec 21 2015 @ 13:49:42	Dec 21 2015 @ 12:00	Dec 31 2015 @ 12:00 (10 days)	
4	1	3	T000000000054	Dec 21 2015 @ 13:56:40	Jan 27 2016 @ 09:00	Sent to Las Vegas	
2	0	2	THH00001	Dec 21 2015 @ 13:58:34	Dec 23 2015 @ 12:00	Dec 24 2015 @ 12:00 (1 day)	
4	1	3	FASDF00001	Dec 21 2015 @ 13:59:3	Jan 18 2016 @ 12:00	Jan 23 2016 @ 12:00 (5 days)	
6	0	6	CHER300002	Dec 21 2015 @ 13:59:40	Jan 12 2016 @ 12:00	Jan 20 2016 @ 12:00 (8 days)	



## Manage Reservations

### 4.3 Change Reservation Date


To set the reservation to a particular date, select a single line and click **Change Date** then select the required date.

### 4.4 Re-set Reservation

If you want to move the item to the bottom of the list (lowest priority) select the line and click **Re-set Reservation**. This assigns the current date to the item.

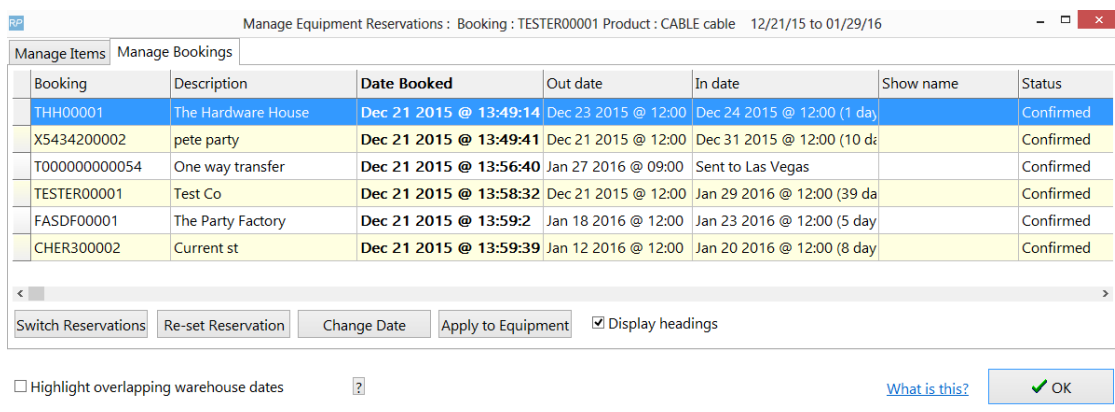
### 4.1 Manage Bookings Tab

The **Manage Bookings** tab lists all bookings for a particular product. Since products are given a reservation date at the time they're added to a confirmed or heavy pencil booking, all products on the booking may not have the same reservation date. Manage Bookings displays all the bookings that affect any of the items on the selected booking (which means there may be bookings listed in Manage Bookings that aren't listed in Manage Items).

 Changing the reservation dates for a booking affects the availability of all the items on that booking and any bookings with overlapping warehouse dates.

Changing the dates on the Manage Bookings tab is similar to changing the dates on the Manage Items tab.

- Switch Reservations      Swaps the dates of two bookings.
- Re-set Reservation      Changes the date to today's date and time.
- Change Date              Allows you to select a particular date.
- Apply to Equipment      Applies the Booked Date from the booking to all products on that booking.



Manage Equipment Reservations : Booking : TESTER00001 Product : CABLE cable 12/21/15 to 01/29/16

Booking	Description	Date Booked	Out date	In date	Show name	Status
THH00001	The Hardware House	Dec 21 2015 @ 13:49:14	Dec 23 2015 @ 12:00	Dec 24 2015 @ 12:00 (1 day)		Confirmed
X5434200002	pete party	Dec 21 2015 @ 13:49:41	Dec 21 2015 @ 12:00	Dec 31 2015 @ 12:00 (10 da		Confirmed
T000000000054	One way transfer	Dec 21 2015 @ 13:56:40	Jan 27 2016 @ 09:00	Sent to Las Vegas		Confirmed
TESTER00001	Test Co	Dec 21 2015 @ 13:58:32	Dec 21 2015 @ 12:00	Jan 29 2016 @ 12:00 (39 da		Confirmed
FASDF00001	The Party Factory	Dec 21 2015 @ 13:59:2	Jan 18 2016 @ 12:00	Jan 23 2016 @ 12:00 (5 day		Confirmed
CHER300002	Current st	Dec 21 2015 @ 13:59:39	Jan 12 2016 @ 12:00	Jan 20 2016 @ 12:00 (8 day		Confirmed

Switch Reservations   Re-set Reservation   Change Date   Apply to Equipment    Display headings

Highlight overlapping warehouse dates   [What is this?](#)



## Manage Reservations

### 5. Options

#### 5.1 Display Headings

If headings can have their own dates then **Display Headings** can be checked. This option displays the individual headings within the bookings. If the Booked Date on the heading is changed it only applies the date to the items under that heading.

#### Operational #89 – Headings Can Have Their Own Dates

Manage Equipment Reservations : Booking : TESTER00001 Product : CABLE cable 12/21/15 to 01/29/16

Booking	Description	Date Booked	Out date	In date
ABC00077	Heading : 1 - FIRST HEADING - A.B.C PROMOTIONS	Dec 20 2015 @ 14:51:14	Dec 22 2015 @ 12:00	Dec 31 2015 @ 12:00 (9 days)
THH00001	The Hardware House	Dec 21 2015 @ 13:49:14	Dec 23 2015 @ 12:00	Dec 24 2015 @ 12:00 (1 day)
X5434200002	pete party	Dec 21 2015 @ 13:49:41	Dec 21 2015 @ 12:00	Dec 31 2015 @ 12:00 (10 days)
T000000000054	One way transfer	Dec 21 2015 @ 13:56:40	Jan 27 2016 @ 09:00	Sent to Las Vegas
TESTER00001	Test Co	Dec 21 2015 @ 13:58:32	Dec 21 2015 @ 12:00	Jan 29 2016 @ 12:00 (39 days)
FASDF00001	The Party Factory	Dec 21 2015 @ 13:59:2	Jan 18 2016 @ 12:00	Jan 23 2016 @ 12:00 (5 days)
CHER300002	Current st	Dec 21 2015 @ 13:59:39	Jan 12 2016 @ 12:00	Jan 20 2016 @ 12:00 (8 days)
ABC00077	Heading : 2 - SECOND HEADING - A.B.C PROMOTIONS	Dec 21 2015 @ 14:51:14	Dec 21 2015 @ 12:00	Dec 31 2015 @ 12:00 (10 days)

Switch Reservations Re-set Reservation Change Date Apply to Equipment  Display headings

Highlight overlapping warehouse dates [What is this?](#)



## Manage Reservations

### 5.2 Highlight Overlapping Warehouse Dates

This option highlights any lines that have warehouse dates overlapping the currently selected booking (from the Running Balance). The highlighted lines should all overlap the original product/booking, however they may not all overlap each other. This option enables you to see which bookings affect each other. Swapping the dates of two bookings that don't overlap won't affect the availability of those two items.

RP Manage Equipment Reservations : Booking : TESTER00001 Product : CABLE cable 12/21/15 to 01/29/16

Booking	Description	Date Booked	Out date	In date	Show name
ABC00077	Heading : 1 - FIRST HEADIN	Dec 20 2015 @ 14:51:14	Dec 22 2015 @ 12:00	Dec 31 2015 @ 12:00 (9 day	
THH00001	The Hardware House	Dec 21 2015 @ 13:49:14	Dec 23 2015 @ 12:00	Dec 24 2015 @ 12:00 (1 day	
X5434200002	pete party	Dec 21 2015 @ 13:49:41	Dec 21 2015 @ 12:00	Dec 31 2015 @ 12:00 (10 da	
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FASDF00001	The Party Factory	Dec 21 2015 @ 13:59:2	Jan 18 2016 @ 12:00	Jan 23 2016 @ 12:00 (5 day	
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Switch Reservations Re-set Reservation Change Date Apply to Equipment  Display headings

Highlight overlapping warehouse dates [What is this?](#)

RP Manage Equipment Reservations : Booking : TESTER00001 Product : CABLE cable 12/21/15 to 01/29/16

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ABC00077	Heading : 1 - FIRST HEADIN	Dec 20 2015 @ 14:51:14	Dec 22 2015 @ 12:00	Dec 31 2015 @ 12:00 (9 day	
THH00001	The Hardware House	Dec 21 2015 @ 13:49:14	Dec 23 2015 @ 12:00	Dec 24 2015 @ 12:00 (1 day	
X5434200002	pete party	Dec 21 2015 @ 13:49:41	Dec 21 2015 @ 12:00	Dec 31 2015 @ 12:00 (10 da	
T000000000054	One way transfer	Dec 21 2015 @ 13:56:40	Jan 27 2016 @ 09:00	Sent to Las Vegas	
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CHER300002	Current st	Dec 21 2015 @ 13:59:39	Jan 12 2016 @ 12:00	Jan 20 2016 @ 12:00 (8 day	
ABC00077	Heading : 2 - SECOND HEAC	Dec 21 2015 @ 14:51:14	Dec 21 2015 @ 12:00	Dec 31 2015 @ 12:00 (10 da	