# Multi Location Module

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## 1. 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.

## 2. How do I activate this module?

The multi location module is activated via your license file. Please contact our accounts department to purchase the module and we'll send you an update license file (support@rentp.com).

## 3. 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.
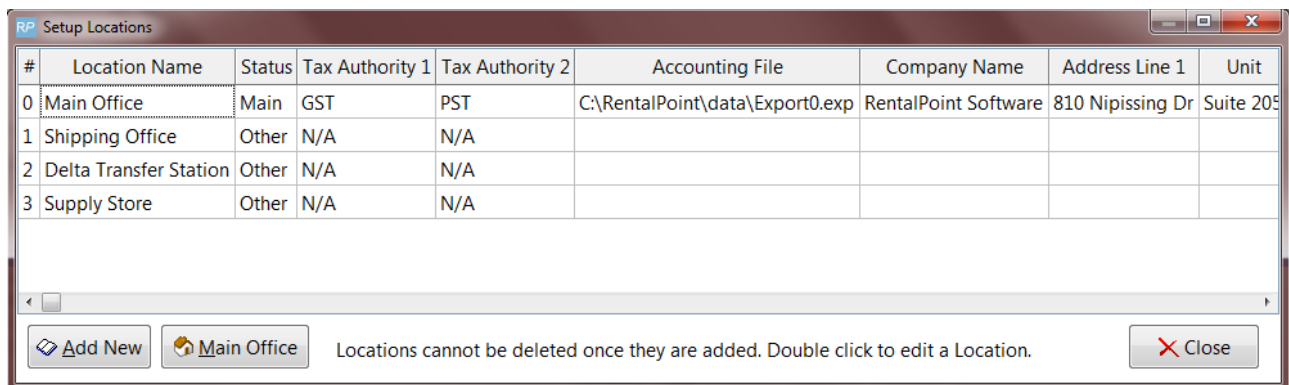
*i*    Regions are enabled via Operational #174.
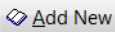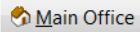
## 4. How do I configure a location?

### 4.1 Setup Locations

The details of all your locations are accessed via **Setup – 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.

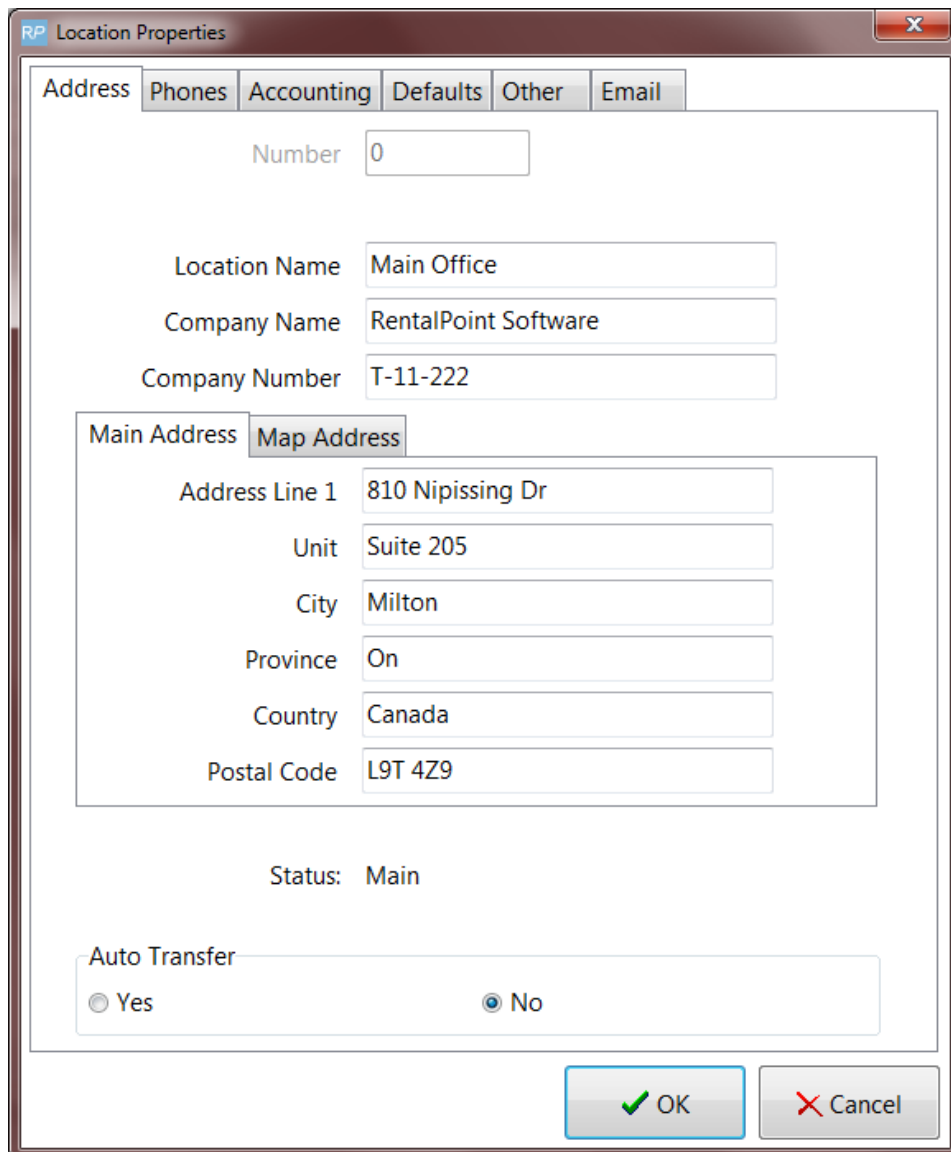*i*    Terminology for **location** can be changed via Setup – Parameters – Terminology – General Tab.

| # | Location Name | Status | Tax Authority 1 | Tax Authority 2 | Accounting File | Company Name | Address Line 1 | Unit |
|---|---|---|---|---|---|---|---|---|
| 0 | Main Office | Main | GST | PST | C:\RentalPoint\data\Export0.exp | RentalPoint Software | 810 Nipissing Dr | Suite 205 |
| 1 | Shipping Office | Other | N/A | N/A | | | | |
| 2 | Delta Transfer Station | Other | N/A | N/A | | | | |
| 3 | Supply Store | Other | N/A | N/A | | | | |

Add New    Main Office    Locations cannot be deleted once they are added. Double click to edit a Location.    Close

4.2 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. |

**RP** Location Properties

| Address | Phones | Accounting | Defaults | Other | Email |

Number  0

Location Name   Main Office

Company Name   RentalPoint Software

Company Number   T-11-222

| Main Address | Map Address |

Address Line 1   810 Nipissing Dr

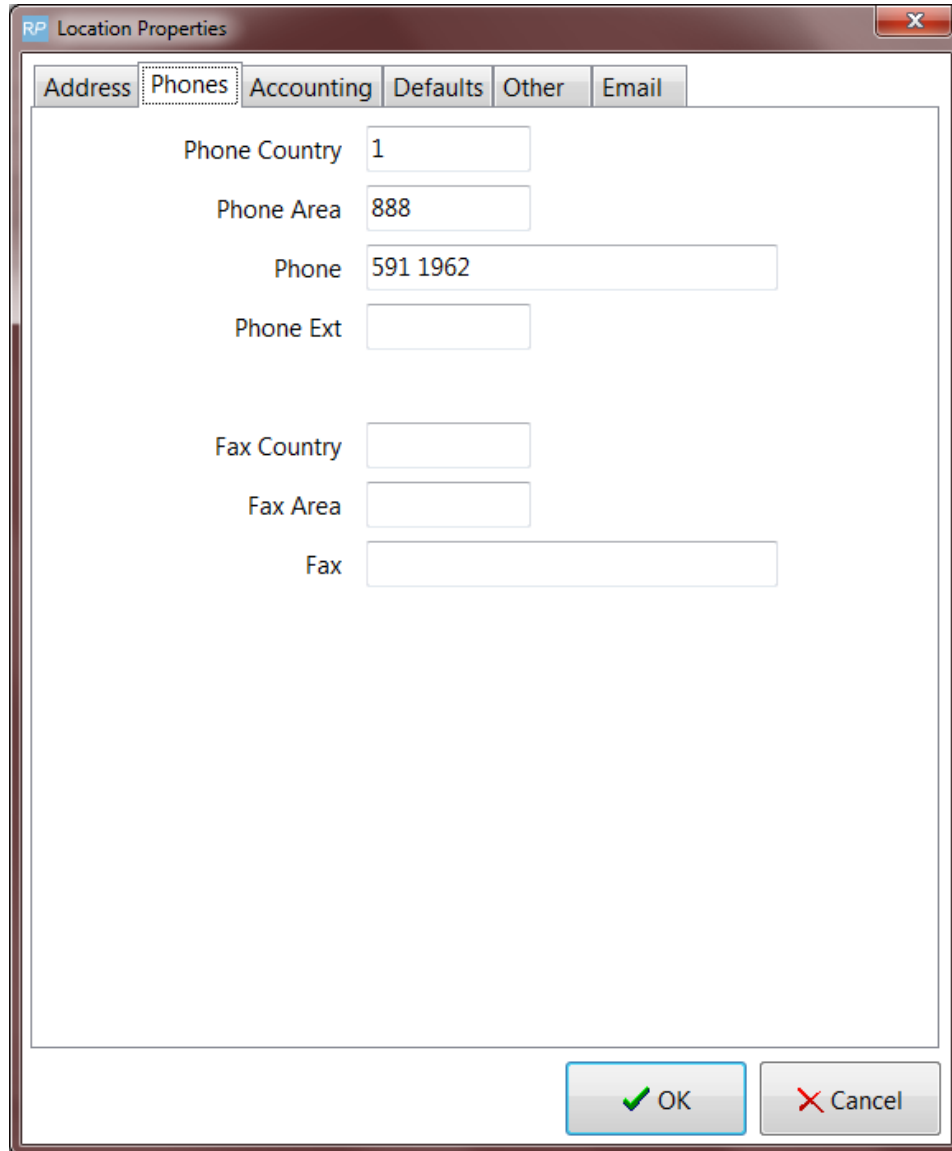Unit   Suite 205

City   Milton

Province   On

Country   Canada

Postal Code   L9T 4Z9

Status:   Main

Auto Transfer
○ Yes          ◉ No

✔ OK          ✗ Cancel

## 4.3 Phones Tab
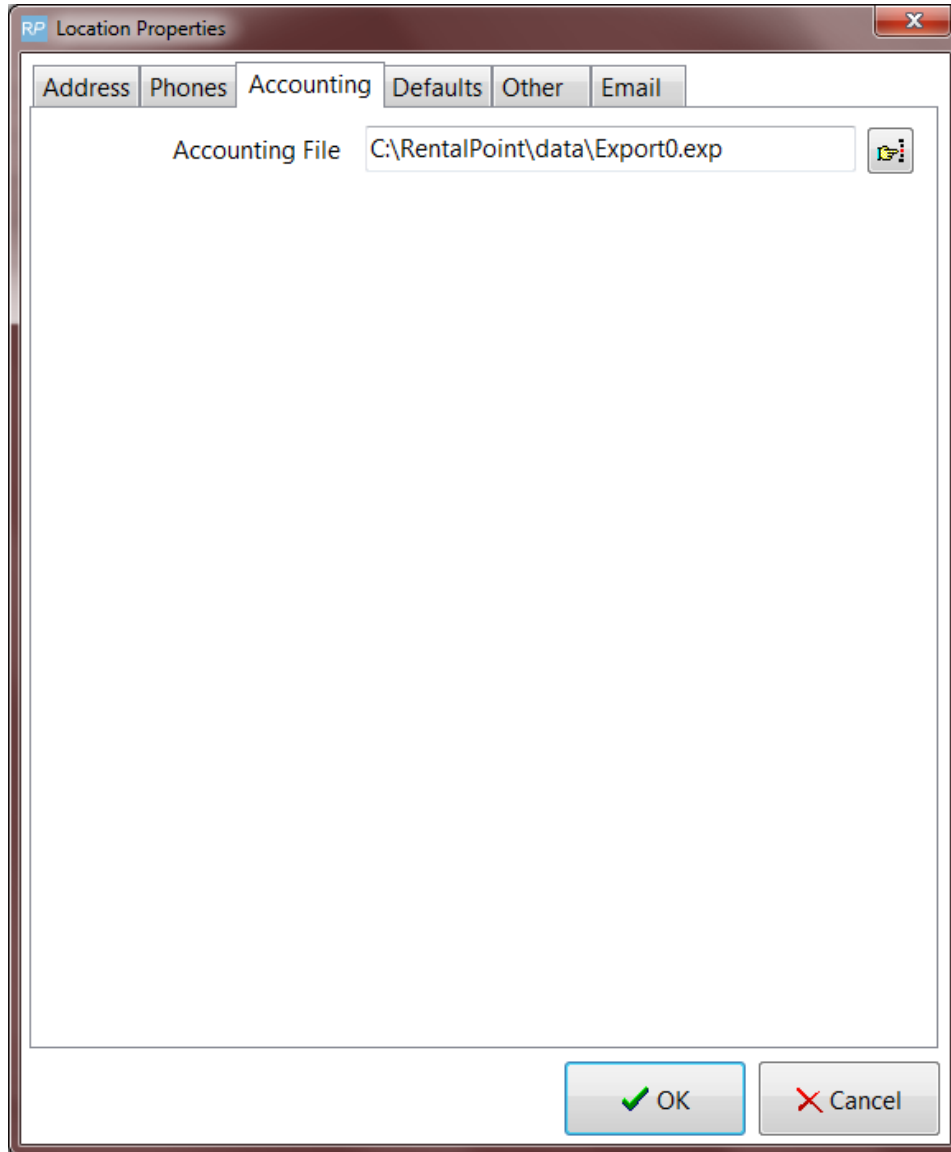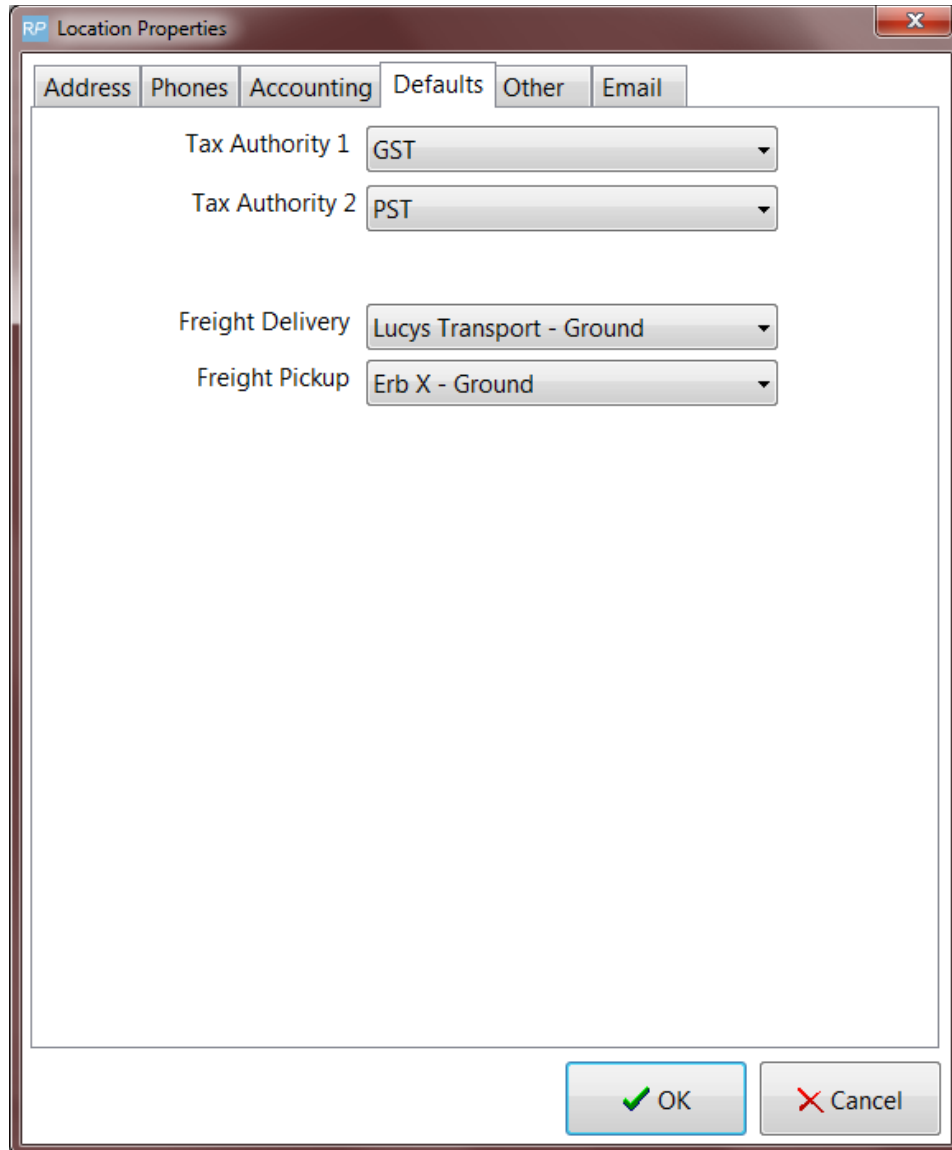
## 4.4 Accounting Tab

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

*i* You can configure account integration via Accounts #21.

| RP Location Properties |
|---|
| Address | Phones | **Accounting** | Defaults | Other | Email |
| Accounting File | C:\RentalPoint\data\Export0.exp |
| ✔ OK | ✗ Cancel |

## 4.5 Defaults Tab

The defaults used when creating a new booking for this location.
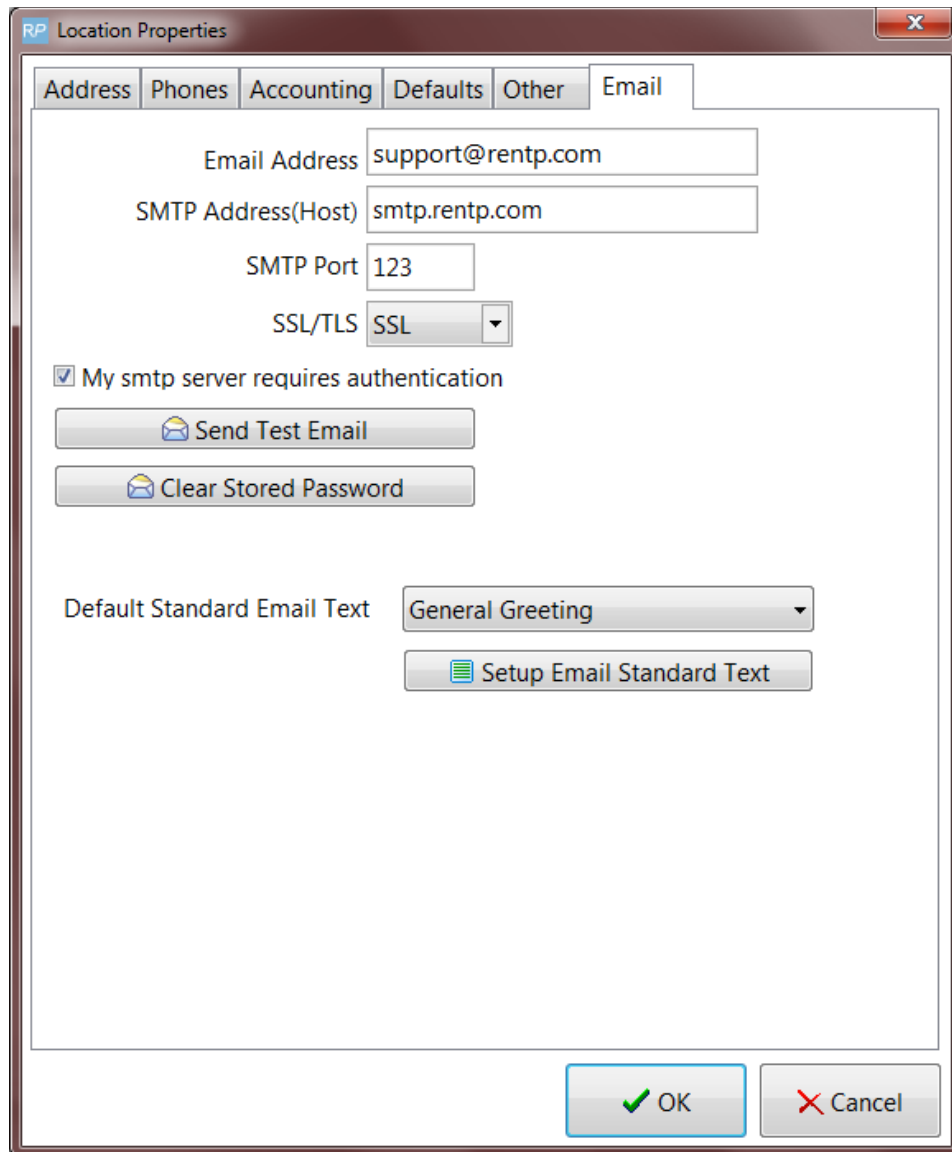
## 4.6 Other Tab

The default location where all your RTF custom templates are stored. When users add templates to the template list, the system defaults to this folder.
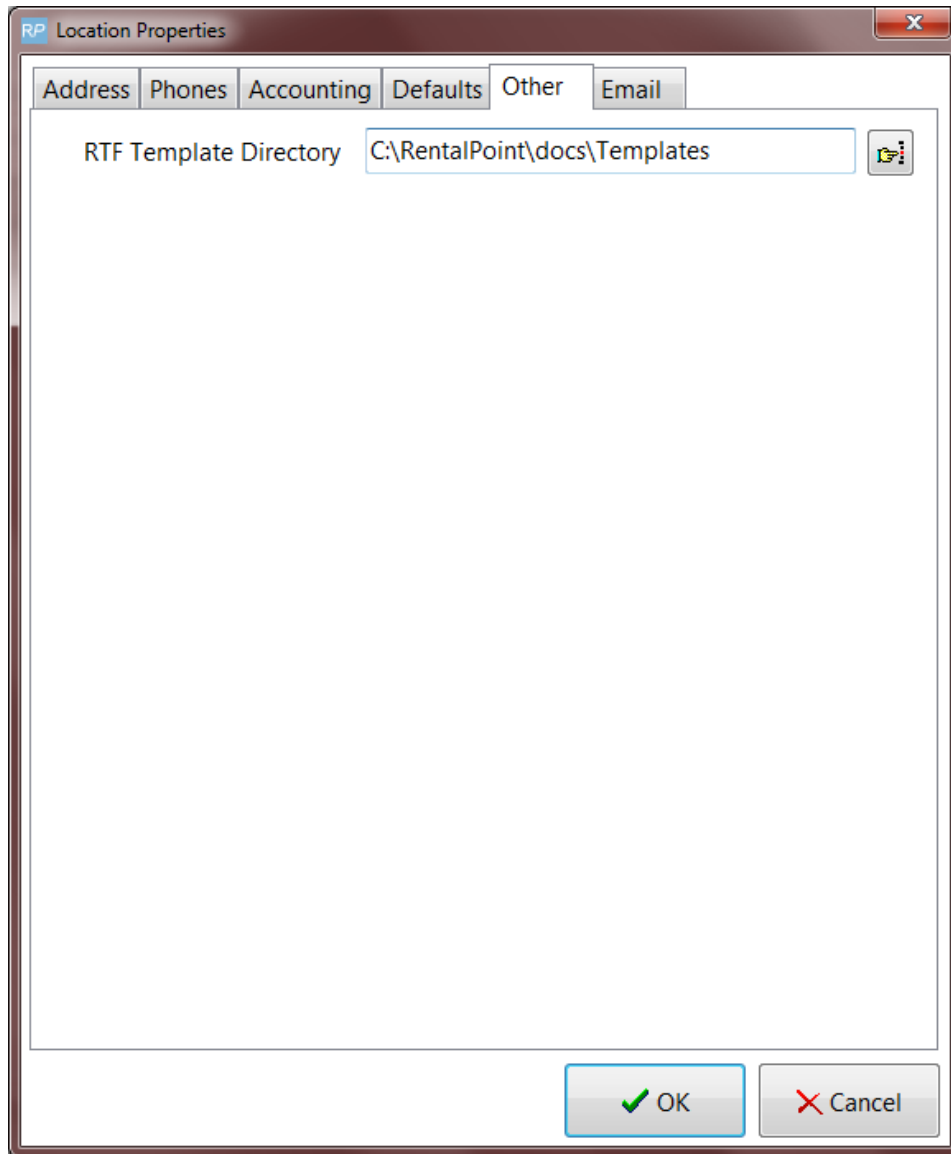
## 4.7 Email Tab

Configure email settings that can be used for your operators.

## 5.  Where are locations used in the system?

Locations are used throughout RentalPoint. Here's a quick overview of the areas that use locations:

| | |
|---|---|
| Availability Utilities | Select a location for the availability calendar, plot sheet and running balance. |
| Bookings<br>Cross Rentals<br>Transfers | Save your orders for a location. Stock quantities are pulled from that location. |
| Secondary Scope | The main scope in RentalPoint can be restricted based on a location. |
| Operator Privileges | Configure access rights to setup locations, select the location scope and change the location scope. Can also restrict access to the 'transfer to' drop down. |
| Add Stock | Select the location that you want to add stock to. |
| Archive Booking | Auto transfers stock to the receiving location. |
| Stocktake | Location scope to perform an inventory check on a per location basis. |
| Asset Listing Report | Report on assets at a particular location. |
| AR Audit Trail<br>Cash Receipts<br>Invoice Register<br>Statements | Run the report for a particular location. |