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### 1. How Can I Customize The Way My Invoice Looks?

Depending on how your company operates there are two options for invoice format

- Standard Invoice hard coded documents that are available to all customers. These have very few customizable options.
- Custom Invoice invoices are rich text files (.rtf) that can be edited in Microsoft Word. These documents are fully customizable within the limits of our insert field module.
- Please contact customer support (support@rentp.com) for more details on either of the above options.

### 2. Where can I see my Invoices in RentalPoint?

A viewable list of the Invoices that have been created can be seen against the customer account via the 'Invoices and Payments' option off the ACTIONS menu, when on the bookings screen.

A copy of the actual invoice for a booking can be found automatically attached to the booking on the attachments tab of an open booking.

### 3. What Output Formats are Available When Printing Invoices?

When documents are produced in RentalPoint they are 'attached' to the booking using a RentalPointPDF print driver. These documents can then be accessed for viewing/printing if desired (this functionality is in versions 10.1.0.23 and higher). You must therefore have RentalPointPDF print driver installed in order to successfully produce documents in later versions of RentalPoint.

Documents can be:

- Emailed as PDF / Emailed as a RTF file
- Saved as Word Document (RTF format) / Saved as PDF 0
- Printed directly to the printer 0

### 4. Invoicing Parameters

Rentalpoint offers invoicing parameters as a means to customize both the look of your company invoices AND the way in which they are produced. These parameters would have been set up during the Implementation Process in accordance with the way you run your business. Please review the invoicing parameters available so that you are aware of the many invoicing options available HOWEVER some parameters should NOT be changed without consulting your Accounts Department (or RentalPoint Supportvia support@rentp.com ) so that you are aware of how the parameter change may affect your business.

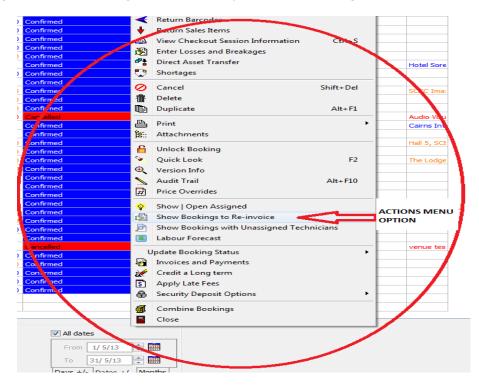
See http://rentp.com/KnowledgebasePDFs/Invoicing Parameters.pdf for more details on Invoicing Parameters. Also check the following parameters:

- Accounts Parameter #5 Archive old paid invoices after...
- Custom Printing Parameter #18 Project Invoice Totals
- Terminology Invoice Date / Tax Point
- Operational #66 Change Booking Status on printing Invoice or Delivery Sheet
- Operational #61 Print Package Items on Invoice
- Operational #11 Show Invoiced warning when opening a booking Operational #16 Long Term Rate Settings
- Operational #39 Default Long Term Rental Period
- Pricing Parameter 8 Long Term Rate Displayed As (not to be changed once products are entered)
- Pricing Parameter 6 Long Term Qualifying Period
- Pricing #66 Cycle Bill Weekends



### 5. Knowing What Bookings are Overdue for Invoicing/Need to be Re-Invoiced

Right Click on the booking Grid and choose option to 'Show Bookings to Re-Invoice'





	rdue For Project In Jnconfirmed Bookin	-	Overdue Fo	Bookings To Be Re-I		For Return	L	ong term To B	due For Invoicing
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### 6. Available Invoicing Options in RentalPoint:

- 1. Standard Invoice This option can be applied to any booking, unless parameters are configured to prevent it.
- Cycle Billed Invoice Used when the client is invoiced in stages (eg 50% deposit and 50% at later time)
   Project Invoice all bookings under a project can be invoiced together or individually

#### **6.1 Standard Invoice**

To invoice a booking using this method use one of the following approaches:

- Highlight the booking and hit the F6 key.
- Highlight the booking, right click (or click Action button) and go to Print -> Invoice or Delivery Sheet on the actions menu
- Choose the option to print the invoice when saving the booking •



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0101714-020			- D1	Booking Contact			0	1	
ir Rentals Lower Bridge S	e.			Venue Delivery to Room Street address	Air Canada 84 Springw			40 #1	
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		Number 1633	Extension	Phone 1 Phone 2 Fax	Country Code	and the second s	a technological statut formation and provide statution	<b>~</b>	1. Reprint Standard Invoice (No new number generated
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#### **6.1.1 Re-Printing a Standard Invoice**

Reprinting an invoice can be done either through the attachments area or the reprint option in the Invoicing window (F6). Reprinting does not create a new invoice number; it re-prints a saved document, no new invoice numbers are generated or used.



### 6.2 Cycle Billed/Long Term Open Ended Rental Invoices

Cycle billed bookings are bookings with a long term rental where the client is billed periodically based on RentalPoint Cycle Billed Parameter Settings. Cycle Billing Options are 7days, 14days, 28 days, Monthly, Quarterly

🕑 Terminology			x	
		Report Titles		$\leftarrow$ -See Terminology settings for how your
Hire / Rental	Hire 🔍	Booking Hardcopy Title	Booking Hardcopy 💌	company can describe Cycle Billed Invoices
Sub Hire / Cross Rental / Sub Contract		Asset Test History Report	P.A.T. Test History 💌	
	Long term 🔍	Address Terms		Other parameters to check are
Unit of Weight Measurement	ong rental	Address line 2	Suburb	Pricing Parameter 8
Onic of Volume Measurement	Open rental	Advress line 3	City	Pricing Parameter 6
	Thire	tate/Province	State/Prov 💌	Pricing Parameter 66
Project Manager C	Cycle billed	Postal code / Zip code	Post code 🔻	<ul> <li>Operational Parameter 16 (see below)</li> </ul>
Salesperson	Salesperson			Operational Parameter 39
Strike / Wrap	suike 💌	Spelling British	Depreciation     Diminishing	
Drivers License [	Drivers License 💌	© U.S	Straight-Line	

By default RentalPoint bills in Advance for the rental/hire of equipment BUT a booking can be set to bill in arrears via the `other details' tab of the booking. Then Check your Settings for Operational Parameter 16 below

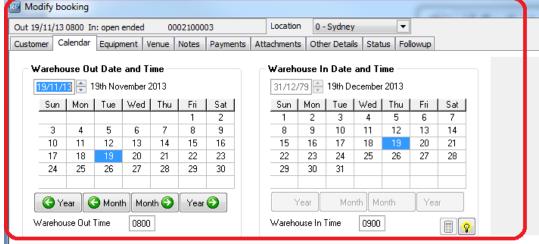
Modify booking		O Long term parmeters			
Out 19/11/13 0800 In: open ended 0002100003 Loc	ation 0 - Sydney				
Customer Calendar Equipment Venue Notes Payments Attachm	ents Other Details	Enable the Long term option			
Project Details	Salesperson	Montly Billing Options	Arrears Billing		
Project Code 123456 🕞 Find 🐼 Open	Salesperson Code	Start billing the 1st of the month	Number of days before the "Bill-to"		
Project Description	Salesperson Nam	(pro-rata invoice is raised from the delivery date to the last day of the month			
		(e.g. First invoice starts June 23rd, second invoice starts July 1st)	Bill 0 Days Ahead		
Project Manager Code	Booking Last Modif	Start billing from the delivery date of the booking	(0-15)		
Project Manager Name	RENTALPOINT S	(pro-rata invoice on the last invoice only)	For example; with # of days set to 3 and a booking that need to be billed for		
		(e.g. First invoice starts June 23rd, second invoice starts July 23rd)	the month of October the booking will be billed on Oct 28 instead of Oct 31		
	Booking Originally		be billed on Oct 28 Instead of Oct 31		
	ME	Select the above options for each booking			
		(Each monthly billed booking can be assigned a start date of the 1st day of the month or the delivery date)			
Contracted Prices	Returning To Loca	Default option			
Variable Price	0 - Sydney	Start billing 1st of the month Start billing on the delivery date			
Rental Price Locked at 2176.00	0 - Sydney				
Labour Locked at 4998.00		Can enter an expected return date	Zero prices on partial return		
		Allows an expected return date to be entered for long term rentals, which will then appear on the day book to be returned on that date.	When partially returning a Long term booking, the price of the returned		
Freight Locked at 0.00		which will then appear on the day book to be returned on that date.	equipment will be removed from the next		
7891.40	Expected attendees	Bill 28 days at the monthly rate	invoice.		
7691.40		Causes 28 day billed bookings to use the monthly charge. This is useful if you wish to have 13 billing periods a year but still use the monthly rate.			
Monthly Cycle Billing Security Deposit					
In Advance     ??     0.00	Event Type	Use 'Stop billing date'			
O In Arrears	Source / Campaign	Allows a date to stop invoicing a booking to be entered			
	Forecasted % of V	that's earlier than the date the booking is returned.			

- Arrears Billing If Cycle Billing is set to Arrears above then you can use the "Arrears Billing" option on the Long Term parameters window to actually bill them 7 days before when they need to be charged. Use this function to bill your client for what they have used, but instead of billing them on 1<sup>st</sup> November for the use in October, you can bill on the 24<sup>th</sup> October (7 days before the actual bill date), for the month of October. Thus by the 1<sup>st</sup> November, there bill for October is actually due and the month has past, so the amount is due.
- **'Can have an expected return date'** Shows the booking on the day book, when that date comes up. Thus we can then give the client a call to check if they want the equipment picked up or will keep on using it. Can be useful to set the booking to this date for example when a client says yes to a 6 month rental/hire of the equipment. A few days before the 6<sup>th</sup> month is over, you give them a call to check if they want the equipment picked up or if they need the equipment longer.
- 'Bill 28 days at the monthly rate' is as it says billing every 4 weeks, so you get 13 billing periods per year rather than 12 monthly periods.
- 'Use Stop billing date', allow you to tell the system to stop billing after date 'x' even though the equipment hasn't come back yet.
- 'Zero prices of partial return', as the equipment is partially returned the invoice amount of the booking goes down. This should be default to ON for most systems.



#### A booking is marked for Cycle/Long Term Billing via the Customer Tab of the Booking Modify booking Out 19/11/13 0800 In 19/12/13 0900 0002100003 Location 0 - Sydney -Save X Cancel Customer Calendar Equipment Venue Notes Payments Attachments Other Details Status Follow Invoice To-Booking Type New Customer Hire • Rental Type Hire Sale Customer Code 00021 🕞 Eind 🕞 Search Normal Set Booking Type to Long Long term Organisation Jack Morton Account Detai Long term 14 Term/ Cycle Billed here Long term 28 Street Address Postal address Payments h 🖹 Long term Quarterly 0.00 Street 123.Itest Current Suburb 1191.19 30 davs Industry Type City New Port Richey State/Prov FL 60 days 0.00 5 Post code 12345 Country 0.00 90 days+ Country Code Area Code Number Extension Fax Options Total Due 1191.19 Phone 1 222 5557777 🔲 Dial Area Code

#### The Warehouse Out Date can be set but the Warehouse In date is grayed out as it is indefinitely booked out



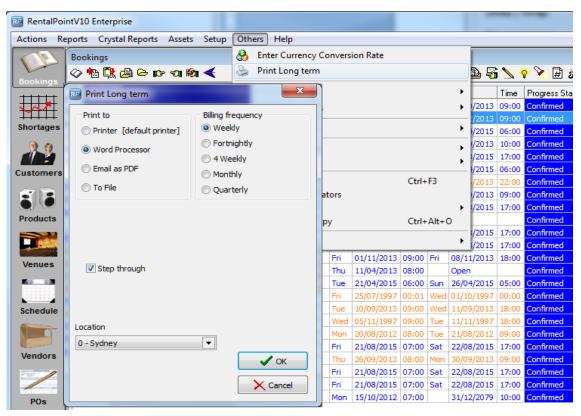
r ... ....

Enabled



#### 6.2.1 Where to find the Print Cycle Billed Option?

- Print Cycle Billed option (depending on your terminology this may read Print Long Term etc.) in the Others main menu (see screenshot on next page)
- Reports -> Reminders for Overdue Items
- Reports -> Status of Cycle Billed Bookings



### 6.2.2 What does Print Cycle Billed/Long Term Invoices do?

This feature searches for all your cycle billed bookings based on the criteria selected.

- The system will loop through the bookings and prompt you to print the invoice or skip it.
- If the booking is in B (Booked) or in O (Out) status and you run the Print Cycle Billed option, the booking will display for invoicing. Once it's in R status (returned) it should not show on the print routine.



RP Long term	C Paragette	×
Long term for 09/02/07 (	inc) to 16/02/07 (ex)	
Booking No.	CAIRNSIN00006	
Customer		
Delivery Date	09/02/07	
Not billed yet		
Will Bill To	16/02/07	
Proceed With Billing This	Booking	
🗸 ок		Cancel

### 6.3 Multi Stage Invoices

Multi Stage Invoices are used when the customer is billed in stages (eg. 50% on order and 50% on delivery). This functionality is driven by parameter settings in RentalPoint and can be set up as follows:

- Enable Invoicing Parameter #46 to allow multiple stage invoicing (these options are only visible in the booking when the parameter is enabled)
- Once the above parameter is enabled simply edit the booking and click the payments tab and follow steps 1,2,3 below.
- If this customer will have many bookings with the same invoice stages then set up the payment terms under the financial tab of the customer record. Once you have done this you can hit 'default' in the payment terms of the booking to load the default terms from the customer record without having to set them up each time.

#### 6.3.1 Adding an Invoice Stage

ut 21/11/13 0800 In 19/12/13 0900 0002100003	Location 0 - Sydney •	Setup Payment Terms			3.
ustomer Calendar Equipment Venue Notes Payme ayment Payment Terms	nts Attachments Other Details Status Fr			🕑 × 🧲	Click to toggle
30 day account		Invoice Stage Name	Anount		% for stages
Payment Options					
Prompt for Payment on Invoiding					
Payment Method Surcharge %					
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		Invoice Stage Name	Amount		
	Balance				
Terms for Multiple Stage Invoicing	Total Price Minus Pre-payments	Amount Not Applied			
torone 2 🔹 🔍 Default	5497.80 0.00	Total	5,497.	80	
1. click to	add stages	Neg Cot	Delete	× Qose	

2. 1 Click to add new stage and save to complete



Once the stages have been added they will show up in the booking

Out 21/11/13 0800 In 19/12/13 0900 0002100003 Customer Calendar Equipment Venue Notes Payme	nts Attachments Oth	er Details Status	Followu	p					
Payment	Invoice Stages			52 C			10		
Payment Terms	Invoice Stage	Pe	cent	Amount	Invoiced In	nvoice No.	1		
30 day account	First stage	50	.00%	2748.90	No		~	_	See here for what
Payment Options	second stage	50	.00%	2748.90	No	-	-		stages are invoiced
Prompt for Payment on Invoicing							-		against what invoid
Terms for Multiple Stage Invoicing	Balance Total Price	Minus Pre-payment	_		Balar				
Terms for Multiple Stage Invoicing	1.	Minus Pre-payment	_	Enter a Pre-paym					

### 6.3.4 Invoice a Booking Stage

Choose the 'Print Invoice or Delivery Sheet' option from the Booking Menu

New 🕨			53-03-50T0				12.00
A Find		Wed	25-05-2016	09:00	Tue	31-05-2016	18:00
💽 Open		Wed	01-06-2016	11:01	Thu	02-06-2016	12:59
View Work		Wed	01-06-2016	12:01	Thu	02-06-2016	11:59
Admin •		Wed	08-06-2016	12:01	Thu	09-06-2016	11:59
Financials	sustin		09-06-2016	12:00	Fri	10-06-2016	12:00
			livery Sheet			F	6 00
	a Invoice						5 00
ie Options •	🛱 Bookin	~					-
📲 Log Out			g a Templati			Ctrl+F1	.0
PUSH, INC.	Custon	n Batch	n (Using a Te	mplate	:]		00
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oronto to 1 - New York			howing All E	quipm	ient S		00
New York to 0 - Toronto	Collect					Ctrl+Alt+	D 00
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ITOR FITZGERALD, L.P.	-		Documents				
749827428742	Purcha		ler istics Report			Ctrl+Alt+	P 00
INNING TENTS			Costs Report	t			30
PUSH, INC.	Crew S	chedu	le			Ctrl+Alt+	.s 30
est	Custon	n Crew	Schedule				00
est	🕅 Technie						

Click the 'Select Stage to Invoice Button below'

Print Invoice or Delivery sheet		
Booking No. MYTEST00007 PO No. ASDF		Select Standard Document Printouts  TAX INVOICE//HIRE AGREEMENT  TAX INVOICE / FILE COPY  TAX INVOICE / FILE COPY
Total Invoiced         332.85         AU           Less Payments         0.00         AU           Balance         332.85         AU	2	TAX INVOICE / CLENT COPY  D Delivery sheet  Collection docket  E Collection docket  C Delivery and as PDF
Payment         30 day account -           Invoice date         02:08:16           Deposit Amount         0.00           Invoice Amount         0.00		Standard Document Printing Onlines     Prices on Delivery Sheet     Select Custom Document Printouts     Custom Invoice Using a Template (click Ok/Print to select template)
Customer Contact	😑 🖻	Booking Contact testing testing
Customer Organisation MYTEST Address		Venue Delivery to CN TOWER Raam 360 PANORAMA
Add Line 2		Street address 301 FRONT STREET WEST
Suburb TEST Post code	State	Add Line 2 Suburb TORONTO State ON
Phone 1		Post code         M5V 2T6         1         1         416         868-6937
💊 Identify		Batch Delivery Blank Form
Less <<	Re-F	Print Invoice Ok/Print X Close



Print Invoice or Deliv	rery sheet					
Booking No.	MYTEST00014	Stage Name	Stag	ge Amount	Invoiced Amount	×
PO No.	SSS	First Stage		2,748.90	0.00	
		Second Stage		2,748.90	0.00	
Total Invoiced Less Payments Balance Payment 30 da Invoice date Deposit Amount Invoice Amount	0.00 AUD 0.00 AUD 0.00 AUD ay account - 0208-16 0.00 AUD 5497.80 AUD	Click here to choose stages you want to i			NOTE: In order to see the STACE smooth on the involve you will need to use a custom template with insert fields &stgRameC& and &stgRameC& stage name and the Stage involve Amount contact theralbolat Support If you need assistance modifying your custom involve template	
Customer Contact Customer Organisation	MYTEST	<u>e</u> ri	Booking Contact Venue Delivery to	testing testing		eei
Address			Room			±1
Add Line 2			Street address			
Suburb	TEST	State	Add Line 2			1
	1631	Jale	Suburb		tate	]
Post code Phone 1		15 Show in Maps	Post code		5 Show in Maps	
			Phone 1			
🧐 Identi	fy			Batch Delivery	Blank Form	
Less <<	:	Re-I	Print Invoice	Ok/Print	🗙 Close	

**Note:** In order to see the STAGE amount on the invoice output document, you will need to use a custom template with insert fields &stgNameC& and &StgAmtDN& to show the stage invoice name and stage invoice Amount respectively. Please contact <u>support@rentp.com</u> if you need assistance modifying your custom template.

#### 6.3.5 Changing a Stage AFTER Invoicing

- A stage may NOT be changed if the stage has been invoiced or if the invoice has been paid
- To fix an error with a stage amount, the user must first REVERSE any payment against the invoice AND CREDIT out the invoice

To Modify an **UNINVOICED** stage, you may access from the booking. Alternatively when you attempt to invoice the booking, if the stage amounts do not equal the booking total, then Rentalpoint will automatically prompt you to correct your stages.

Dut 02/08/16 153	0 In 03/08/16	0930 MYTE	5T00014 Loc	ation 0 - Toror	ito 💌						
Customer C	alendar	Equipment	Notes	Attachments	Other Details	Status	Payments	Crew	Location	Followup	
Payment			-Invoice Stages						-	1	1
Payment Terms			Invoice Stage		Percent	Amount	Invoiced Invoice	No. Invoiced			
30 day accour	nt	•	First Stage		50.00%	2748.90	No				
Payment Option	15		Second Stage		50.00%	2748.90	No				
Prompt for Pay	ment on Invoi	cing 🔻									
Payment Metho	d :	Surcharge %									
	-	0.00									
						RP Setup Paymen	t Terms				
						_				<b>8</b> 9	%
2 <b>11</b> 12			Balance			Invoice Stage	Name	Amount			
erms for Multip	le Stage Invoid		Total Price	Minus Pre-	payments	First Stage			2748.9	D	
50.00%/50.00%	•	Default	5497	7.80	0.00 🏼 🧶 E	nte Second Stage			2748.9	D	
Credit Card Infor	mation	Click to m	odify stages			-					
Name		- pi 🕞		Card Name		-					
Address Line 1				Card Number		-					Þ
Address Line 2				E		Invoice Stage	Name		A	Amount	
Suburb			I	D No.					[		1
State				Expiry Date					L		
						Amount Not A	Applied		[	-0.00	7
Post code				M	M YY			ere to edit	L		-
						Total	highlig	hted stage		5497.80	
						Ne <u>w</u>	<u>⊖ E</u> dit 付 De	lete		×c	lose



#### 6.3.6 Printing/Re-Printing a Multi Stage Invoice:

- In order to see the STAGE name and amount the invoice you are printing, you will need to use specific custom template insert fields (&srtNameC& and &StgAmtDN&), if you are unsure of how to do this please contact RentalPoint Support for assistance (<a href="support@rentp.com">support@rentp.com</a>).
- You cannot re-print an invoice stage (via 'print using custom template'). However you can find each stage invoice on the attachments tab of the booking and could print from there.



### 6.4 Project Invoicing

See screen shots below for step by step instructions on how to invoice a project.

#### NOTE:

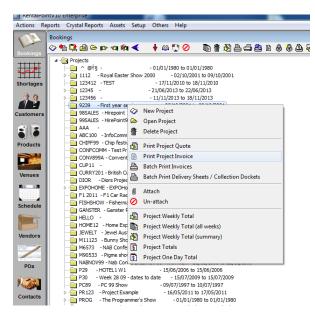
- Bookings are attached to a project by entering a project code in the 'other details' tab of the booking.
- When invoicing a project, taxes from the customer being invoiced will override any and all taxes entered on the booking within the project. See below for screenshots
- Project Invoicing Options
  - Bookings Individually Invoiced the user would like to individually print an invoice for each booking separately. In this case each booking can be invoiced as outlined in invoicing options 1-4 above.
  - $_{\odot}$   $\,$  One Invoice for Project One project invoice is produced to send to the client.

#### 6.4.1 Choose how the project should be invoiced....

Project	
Project	
Project Code XYZ Project Description Expected Attendees0	Venue  O Delivery Address Name Address
Bookings in Project Invoiced Bookings Individually Invoiced One Invoice for Project NOTE: When invoicing a Project, taxes from the customer being invoiced will override any and all taxes entered on the bookings within the Project. Calendar Warehouse Of Date 16/11/12	Suburb City State/Prov Country Post code Contact Country Code Area Code Number Phone 1 Phone 2 Fax
Show Starting Date         16/11/12	Discounts Rental Discount Rate 0.00 DE - DEMO ▼ Coordinator Sales Discount Rate 0.00 DE - DEMO ▼
Days Using 1 Project Invoice Settings	

6.4.2 Right click on the project and click 'Print Project Invoice'....





#### 6.4.3 Choose discount method....

#### **Discount Options**

- Use Discount from Project and Taxes from the Customer Using this option will produce ONE Project Invoice. This invoice will be attached to the account selected under the 'Organisation Details to Use' on the same screen.
- Use Discounts and Taxes from Bookings If you choose discount and taxes from the bookings <u>RentalPoint will produce</u> an invoice for each booking in the project BUT will merge all these bookings to one piece of paper to send to the client – there will be no invoice number on the merged document and you will not see the document attached to any customer record as it is NOT an invoice but a summary of all bookings invoiced under that project. This option is often used to tax some items in a project and not others.

RP Details for Printing Project - PROJECT - Billing Cycle #4	×
Company Details to Use	Bill To
WINGS - Wings For Life Foundation	✓ Same WINGS
Print Options	
Use FastReport Discounts and Taxes	
<ul> <li>Use Discounts From Project and Taxes from Customer Selected Above</li> <li>Use Discounts and Taxes From Bookings</li> </ul>	
Note : Selecting 'Use Discounts From Project' will apply the project rental discoun equipment totals. It will also apply the taxes from the selected customer to the tota discounts or taxes on the individual bookings. Select 'Use Discounts and Taxes From booking discounts and taxes and ignore the project discounts and taxes.	ls. This option overrides any
×	Cancel Next ->

Click Next to move on and pick an invoice date



Select the invoice date and click Next to select the template.

11/03/16	📮 11t	h March 2	016			
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		
🕝 Yea	r 🔇 M	Ionth	$\frown$	Mor	ith 🕘	Year 🗿

