



Contents

1. How Can I Customize The Way My Invoice Looks?.....	2
2. Where can I see my Invoices in RentalPoint?	2
3. What Output Formats are Available When Printing Invoices?	2
4. Invoicing Parameters	2
5. Knowing What Bookings are Overdue for Invoicing/Need to be Re-Invoiced.....	3
6. Available Invoicing Options in RentalPoint:.....	4
6.1 Standard Invoice	4
6.1.1 Re-Printing a Standard Invoice.....	5
6.2 Cycle Billed/Long Term Open Ended Rental Invoices	6
6.2.1 Where to find the Print Cycle Billed Option?.....	8
6.2.2 What does Print Cycle Billed/Long Term Invoices do?	8
6.3 Multi Stage Invoices	9
6.3.1 Adding an Invoice Stage.....	9
6.3.4 Invoice a Booking Stage	10
6.3.5 Changing a Stage AFTER Invoicing	11
6.3.6 Printing/Re-Printing a Multi Stage Invoice:	12
6.4 Project Invoicing.....	13



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
- Printed directly to the printer

4. Invoicing Parameters

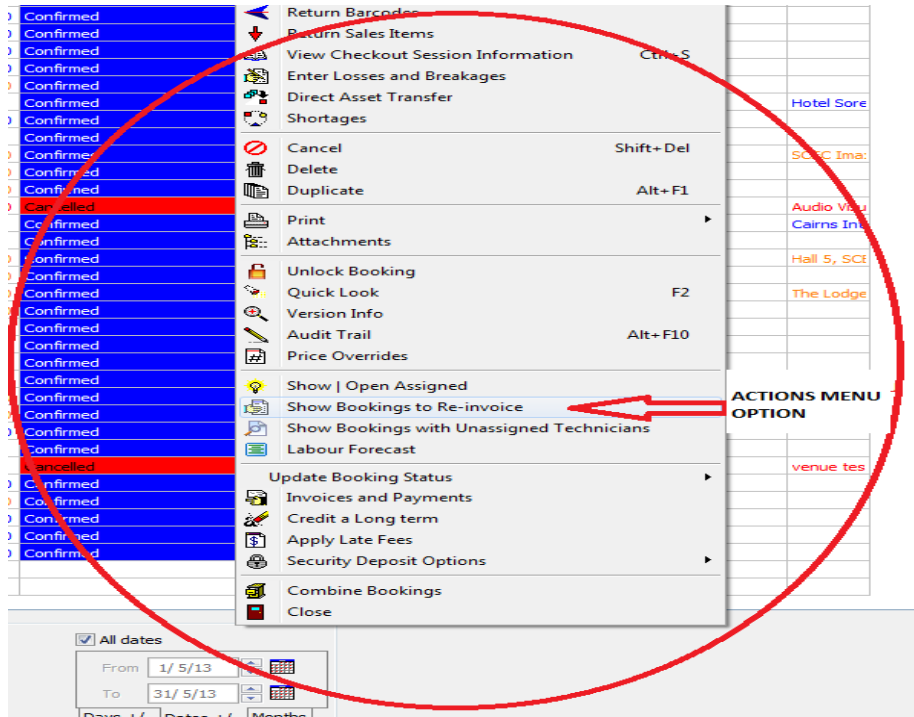
Rentalpoint offers invoicing parameters as a means to customize both the look of your company invoices AND the way in which they are produced. These parameters would have been set up during the Implementation Process in accordance with the way you run your business. Please review the invoicing parameters 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 Support via support@rentp.com) so that you are aware of how the parameter change may affect your business.

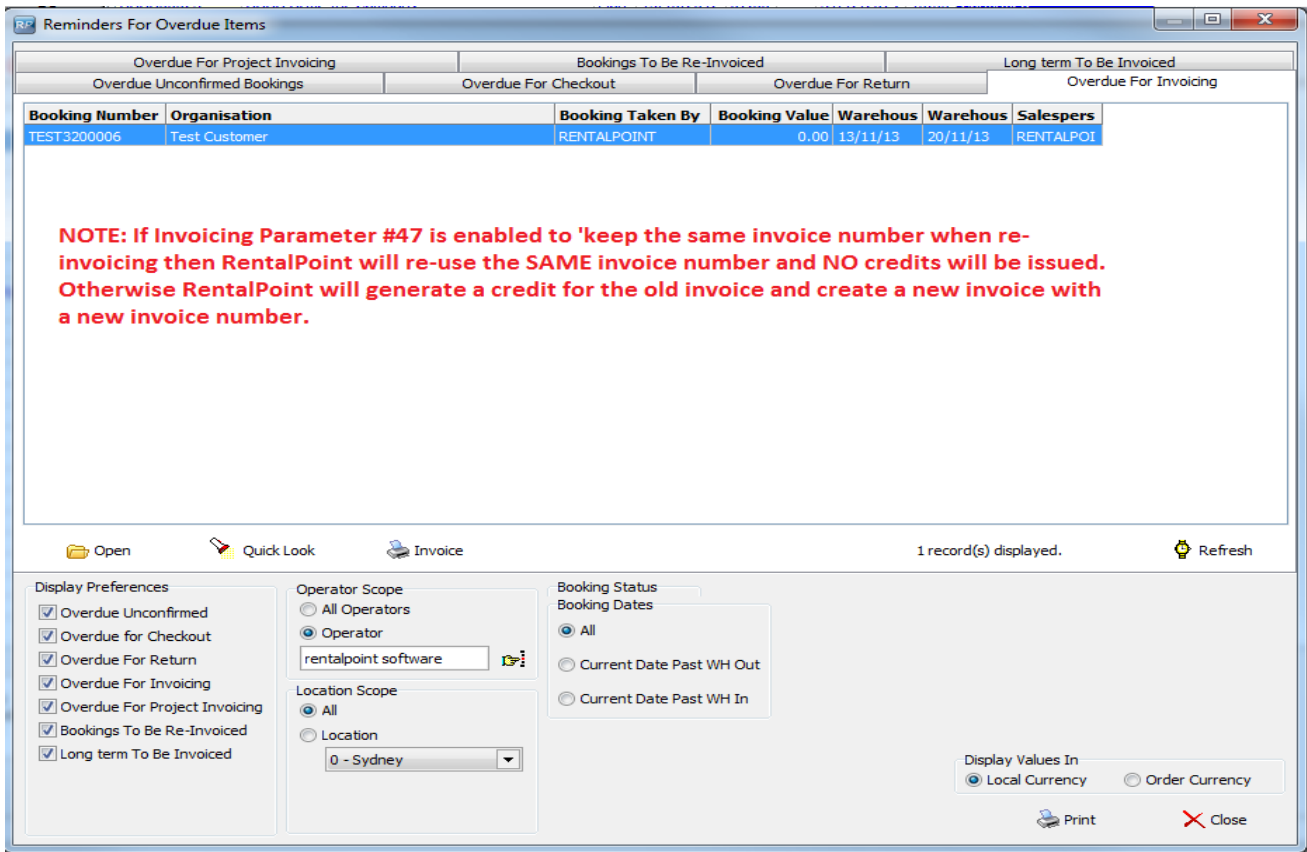
See http://rentp.com/KnowledgebasePDFs/Invoicing_Parameters.pdf for more details on Invoicing Parameters. Also check the following parameters:

- 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'





Booking Number	Organisation	Booking Taken By	Booking Value	Warehous	Warehous	Salespers
TEST3200006	Test Customer	RENTALPOINT	0.00	13/11/13	20/11/13	RENTALPOI

NOTE: If Invoicing Parameter #47 is enabled to 'keep the same invoice number when re-invoicing then RentalPoint will re-use the SAME invoice number and NO credits will be issued. Otherwise RentalPoint will generate a credit for the old invoice and create a new invoice with a new invoice number.

1 record(s) displayed.

Display Preferences:

- Overdue Unconfirmed
- Overdue for Checkout
- Overdue For Return
- Overdue For Invoicing
- Overdue For Project Invoicing
- Bookings To Be Re-Invoiced
- Long term To Be Invoiced

Operator Scope:

- All Operators
- Operator

Location Scope:

- All
- Location

Booking Status:

- All
- Current Date Past WH Out
- Current Date Past WH In

Display Values In:

- Local Currency
- Order Currency

6. Available Invoicing Options in RentalPoint:

1. Standard Invoice – This option can be applied to any booking, unless parameters are configured to prevent it.
2. Cycle Billed Invoice/ Long Term Open Ended Rental
3. Multi Stage Invoice – Used when the client is invoiced in stages (eg 50% deposit and 50% at later time)
4. 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

1. Reprint Standard Invoice (No new number generated -

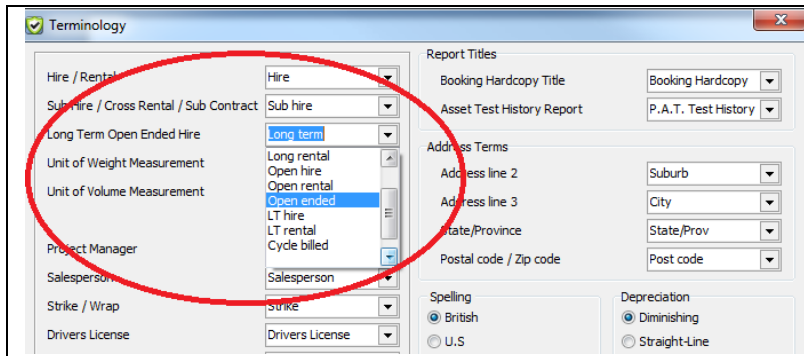
2. NO custom template used. see 'Print using custom template off actions menu to re-print using custom template.

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

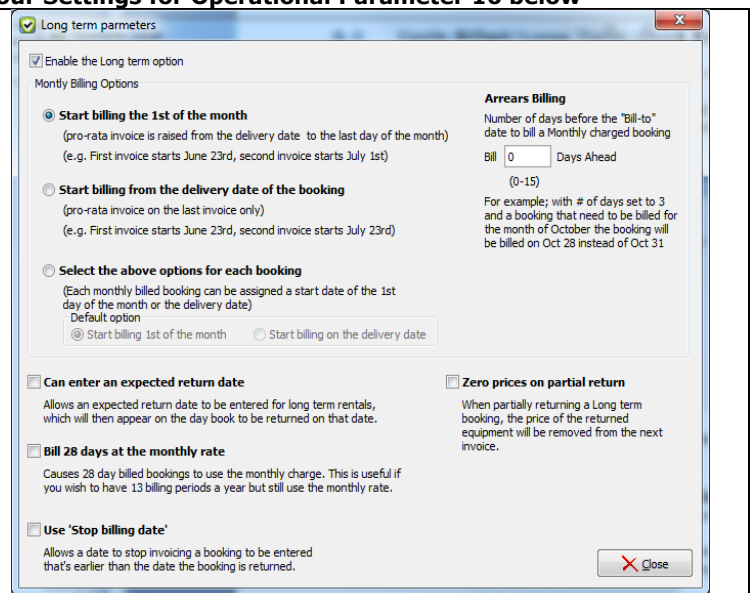
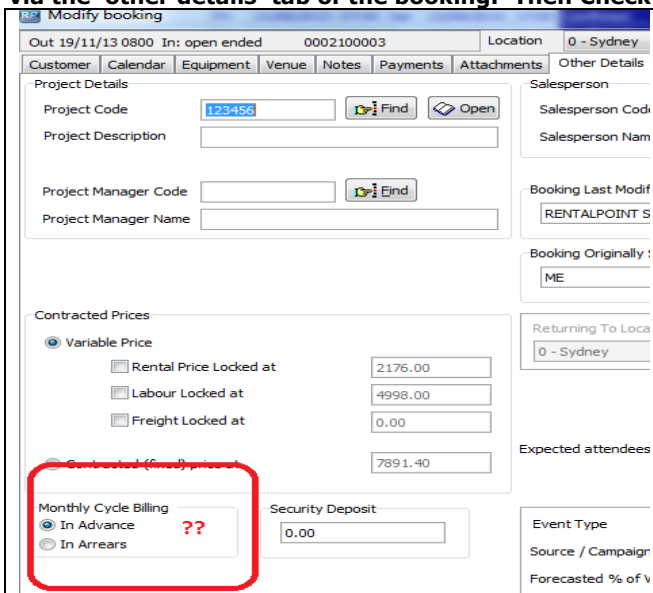


←-See Terminology settings for how your company can describe Cycle Billed Invoices

Other parameters to check are

- Pricing Parameter 8
- Pricing Parameter 6
- Pricing Parameter 66
- Operational Parameter 16 (see below)
- Operational Parameter 39

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



- **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 1st November for the use in October, you can bill on the 24th October (7 days before the actual bill date), for the month of October. Thus by the 1st 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 6th 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

Customer Calendar Equipment Venue Notes Payments Attachments Other Details Status Followup

Invoice To New Customer

Customer Code 00021

Organisation Jack Morton

Street Address Postal address

Street 123 Jtest

Suburb

City New Port Richey State/Prov FL

Country Post code 12345

Country Code Area Code Number Extension

Phone 1 222 5557777

Industry Type

Fax Options Dial Area Code

Booking Type Hire

Rental Type Normal Hire Sale

Account Detail Long term 7 Long term 14 Long term 28

Payments Long term Monthly Long term Quarterly

Current 0.00

30 days 1191.19

60 days 0.00

90 days+ 0.00

Total Due 1191.19

Set Booking Type to Long Term/ Cycle Billed here

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

Modify booking

Out 19/11/13 0800 In: open ended 0002100003 Location 0 - Sydney

Customer Calendar Equipment Venue Notes Payments Attachments Other Details Status Followup

Warehouse Out Date and Time

19/11/13 19th November 2013

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

Year Month Month Year

Warehouse Out Time 0800

Warehouse In Date and Time

31/12/79 19th December 2013

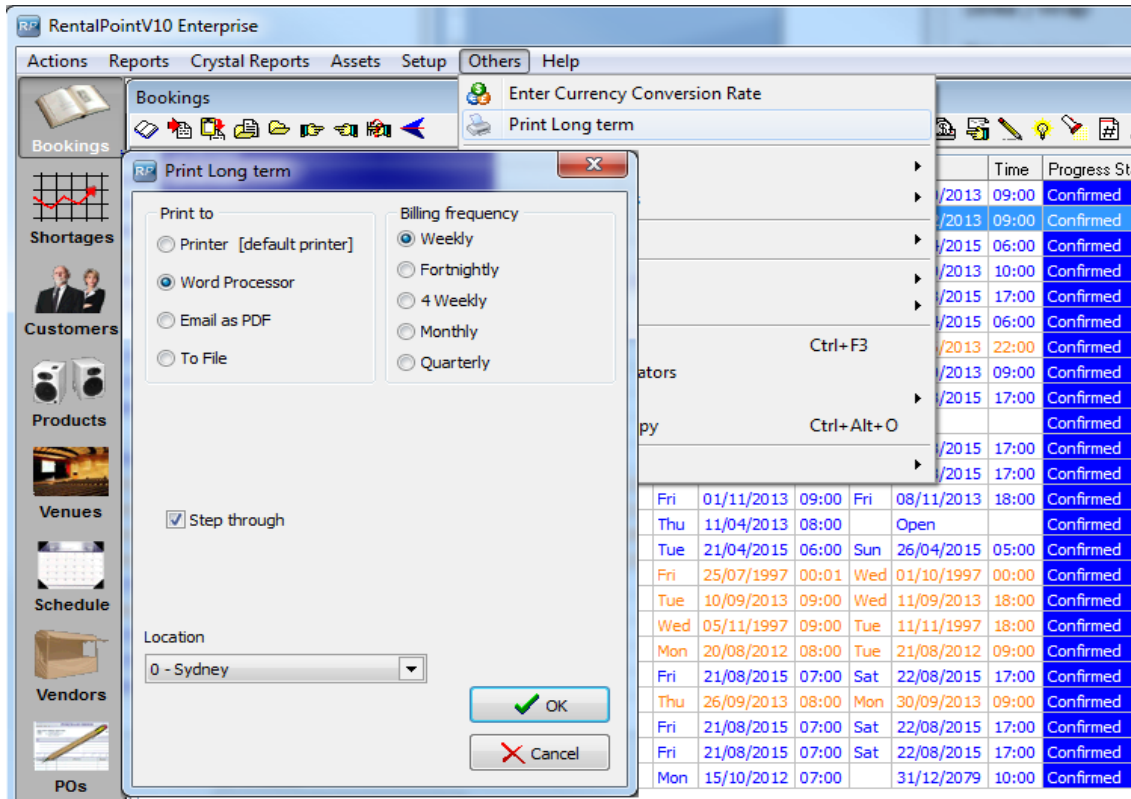
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Year Month Month Year

Warehouse In Time 0900

6.2.1 Where to find the Print Cycle Billed Option?

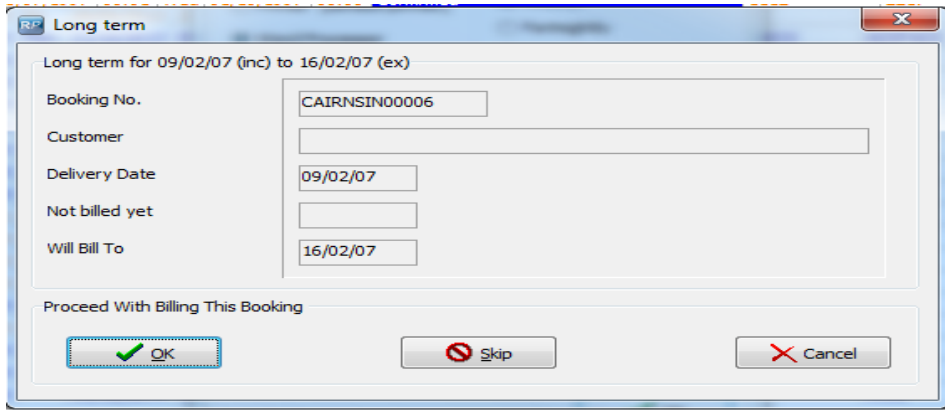
- Print Cycle Billed option (depending on your terminology this may read Print Long Term etc.) in the Others main menu (see screenshot on next page)
- Reports -> Reminders for Overdue Items
- Reports -> Status of Cycle Billed Bookings



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.

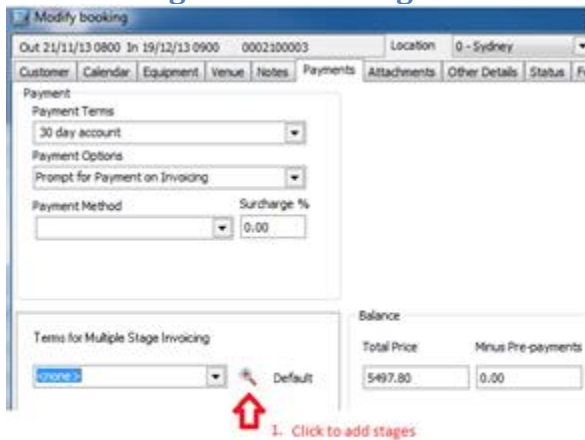


6.3 Multi Stage Invoices

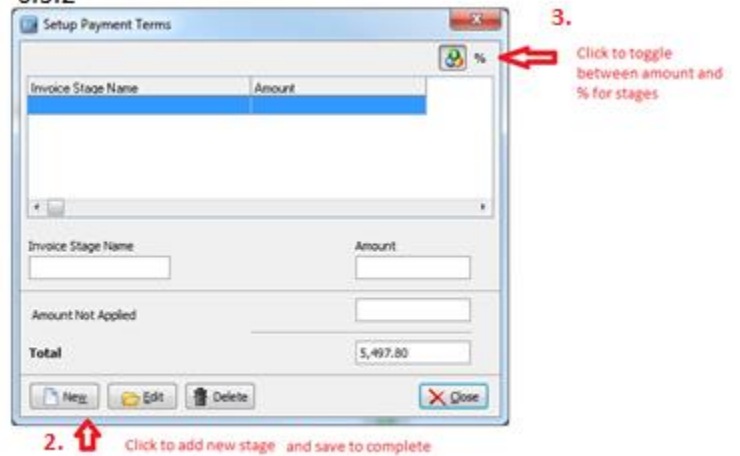
Multi Stage Invoices are used when the customer is billed in stages (eg. 50% on order and 50% on delivery). This functionality is driven by parameter settings in RentalPoint and can be set up as follows:

- 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



6.3.2



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

The screenshot shows the 'Modify booking' window with the following details:

- Out: 21/11/13 0800, In: 19/12/13 0900, 0002100003, Location: 0 - Sydney
- Payment Terms: 30 day account
- Payment Options: Prompt for Payment on Invoicing
- Payment Method: [Dropdown], Surcharge %: 0.00
- Invoice Stages Table:

Invoice Stage	Percent	Amount	Invoiced	Invoice No.
First stage	50.00%	2748.90	No	
second stage	50.00%	2748.90	No	
- Balance: Total Price 5497.80, Minus Pre-payments 0.00, Balance 5497.80
- Terms for Multiple Stage Invoicing: 50.00%/50.00%



See here for what stages are invoiced against what invoice number



Shows HOW the booking is set up for invoicing

6.3.4 Invoice a Booking Stage

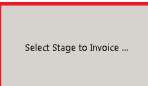
Choose the 'Print Invoice or Delivery Sheet' option from the Booking Menu

The screenshot shows a menu with various options. The 'Print' menu is expanded, and 'Invoice or Delivery Sheet' is highlighted.

Click the 'Select Stage to Invoice Button below'

The screenshot shows the 'Print Invoice or Delivery sheet' window with the following details:

- Booking No.: MYTEST00007, PO No.: ASDP
- Total Invoiced: 332.85 AUD, Less Payments: 0.00 AUD, Balance: 332.85 AUD
- Payment: 30 day account -
- Invoice date: 02-08-18
- Deposit Amount: 0.00 AUD, Invoice Amount: 0.00 AUD
- Customer Contact: [Redacted]
- Customer Organisation: MYTEST, Address: [Redacted], Suburb: TEST, State: [Redacted], Post code: [Redacted], Phone 1: [Redacted]
- Booking Contact: testina testina
- Venue: CN TOWER, Delivery to: 360 PANORAMA, Room: 301 FRONT STREET WEST, Add Line 2: [Redacted], Suburb: TORONTO, State: ON, Post code: M5V 2T6, Phone 1: 1 416 868-6937
- Buttons: Identify, Less <<, Re-Print Invoice, Batch Delivery, Blank Form, Ok/Print, Close



Stage Name	Stage Amount	Invoiced Amount
<input type="checkbox"/> First Stage	2,748.90	0.00
<input type="checkbox"/> Second Stage	2,748.90	0.00

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 support@rentp.com 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.

Invoice Stage	Percent	Amount	Invoiced	Invoice No.	Invoiced
First Stage	50.00%	2748.90	No		
Second Stage	50.00%	2748.90	No		



RentalPoint Invoicing Options

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 (support@rentp.com).
- 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.

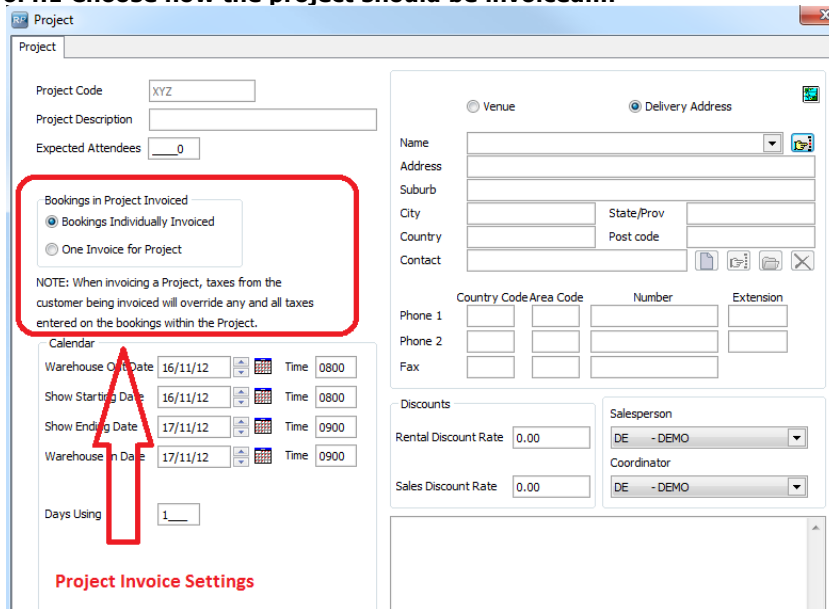
6.4 Project Invoicing

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.
 - One Invoice for Project – One project invoice is produced to send to the client.

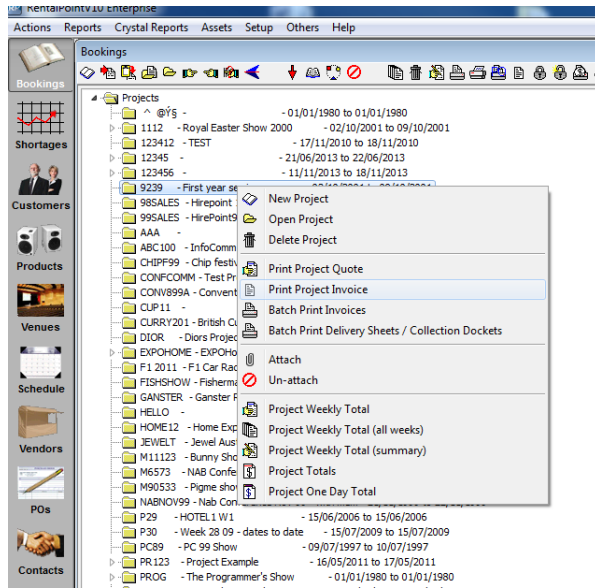
6.4.1 Choose how the project should be invoiced....



The screenshot shows the 'Project' window with the following details:

- Project Code:** XYZ
- Project Description:** [Empty field]
- Expected Attendees:** 0
- 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 Out Date: 16/11/12 Time: 0800
 - Show Starting Date: 16/11/12 Time: 0800
 - Show Ending Date: 17/11/12 Time: 0900
 - Warehouse In Date: 17/11/12 Time: 0900
 - Days Using: 1
- Project Invoice Settings:** (Label at the bottom)
- Address Section:**
 - Venue
 - Delivery Address
 - Name, Address, Suburb, City, Country, Post code, Contact
 - Phone 1, Phone 2, Fax
- Discounts:**
 - Rental Discount Rate: 0.00
 - Sales Discount Rate: 0.00
- Salesperson:**
 - Coordinator: DE - DEMO

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 RentalPoint will produce 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.

Click Next to move on and pick an invoice date

Company Details to Use
WINGS - Wings For Life Foundation

Bill To
 Same
WINGS

Print Options
 Use FastReport

Discounts and Taxes
 Use Discounts From Project and Taxes from Customer Selected Above
 Use Discounts and Taxes From Bookings

Note : Selecting 'Use Discounts From Project...' will apply the project rental discount and project sale discount to the equipment totals. It will also apply the taxes from the selected customer to the totals. This option overrides any discounts or taxes on the individual bookings. Select 'Use Discounts and Taxes From Bookings' to keep the individual booking discounts and taxes and ignore the project discounts and taxes.

Cancel Next

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

RP Details for Printing Project - PROJECT - Billing Cycle #4

Invoice Date
11/03/16 11th March 2016

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		

Account Payment

Payment Details | Invoices and Payments | Security Deposits

Account Balances

90 days+	60 days	30 days	Current	Total Due	Payments (last 30 days)
0.00	0.00	0.00	0.00	0.00	0.00

Tag	Invoice #	Date	Seq	Amount	Type	Int Credited	Credit Date	Outstanding	Cheque/Card #	Pay Type
	13037	29/10/13	00002	11.00	Invoice			6.00		
		29/10/13	00002	5.00	Payment				1234	Cheque
	13038	30/10/13	00001	11.00	Invoice			11.00		
	13050	11/11/13	00005	1,760.00	Invoice			1,760.00		
	13052	18/11/13	PR	110.00	Invoice			110.00		

↑ Shows as project invoice on customer account

Memo: Project Invoice

Totals

Payment Amount	Amount Applied	Settlement Discount
0.00	0.00	0.00

Scope

- Invoices
- Credits
- Pre-payments
- Payments

Start Date:

End Date:

Age to Display

- Last 12 months
- Last 6 months
- Last 3 months
- Select dates
- All dates

Include Archived

Sort Transactions By

- Invoice No.
- Invoice Date