Booking Equipment Grid

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Booking Equipment Grid

Equipment Grid Parameters

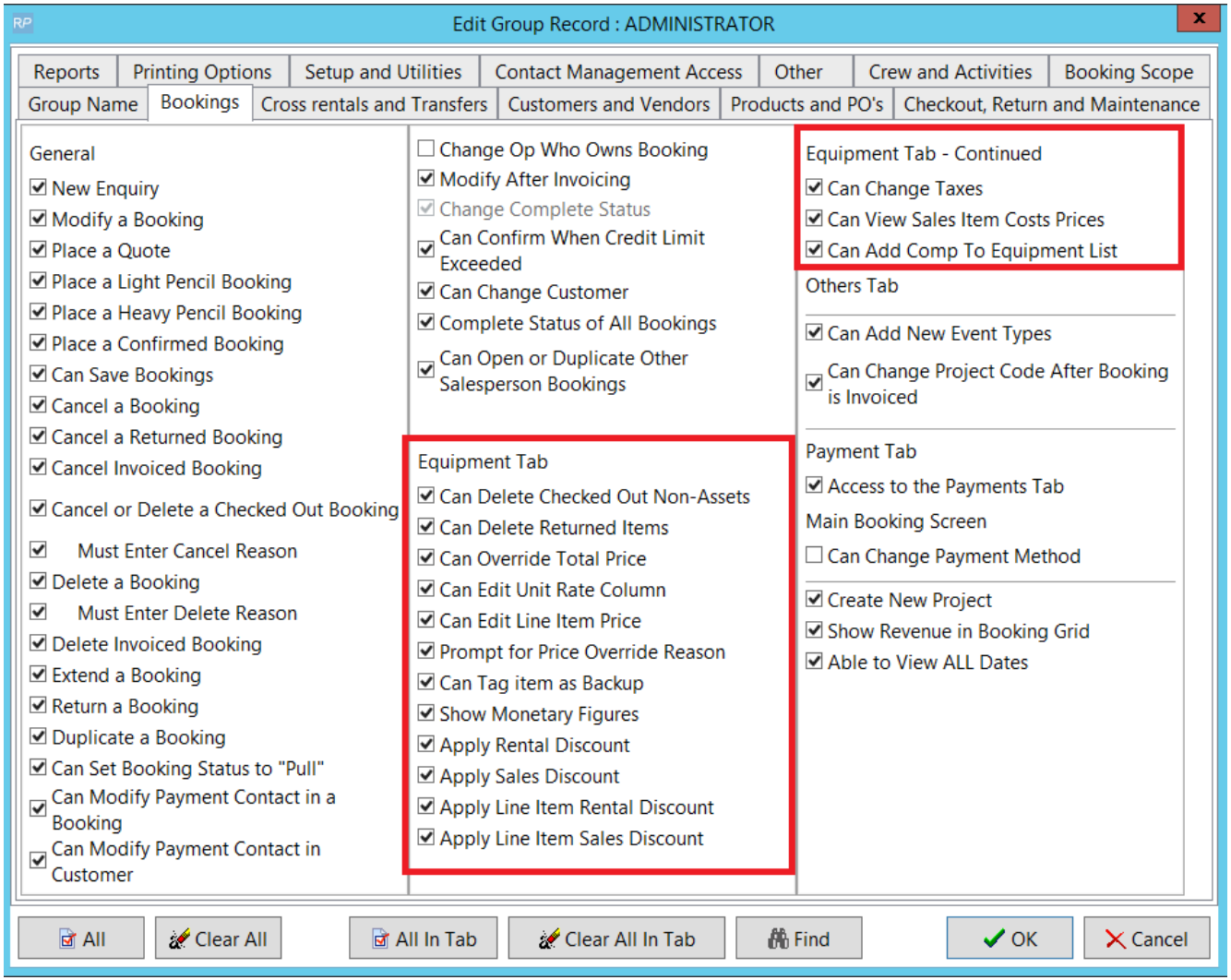
Accessible via Setup→Parameters→Operational Parameters:

#	Description	Functionality
44	'Enabled Client Facing and Warehouse Active/Mute'	Allow users to hide/display equipment items on both client facing and warehouse facing documents. Items hidden from warehouse will not appear in the checkout window. Items hidden from client will have no cost and will not affect booking price. See video demo at this link https://youtu.be/_aGgWBmxwpg
90	'Enable Discount Column in Equipment Grid'	Allow users to apply a line item discount to items in the equipment grid
106	'Use Custom Colours for Equipment Grid'	If enabled, equipment in the booking can be displayed in different colours, based on the colour for the product category in Inventory Setup
118	'Display Out and In Columns in Equipment Grid'	If enabled, the qty checked out and returned for each item will display in the equipment grid of the booking
129	'Equipment Search is Location Sensitive'	Controls products displayed on the equipment treeview of the booking If set to YES, equipment in the treeview of the booking tab will be listed by location. Only equipment with quantities in the specified location will be displayed.
179	'Make Equipment Find Tab Visible'	Choose whether or not the find tab is displayed when searching for equipment
49	'Equipment Sequence in Equipment Tab of Booking'	Set equipment sequence to Treeview or 'As user enters it'

Booking Equipment Grid

Equipment Grid Operator Privileges

Accessible via Setup→Parameters→Operational Operators:

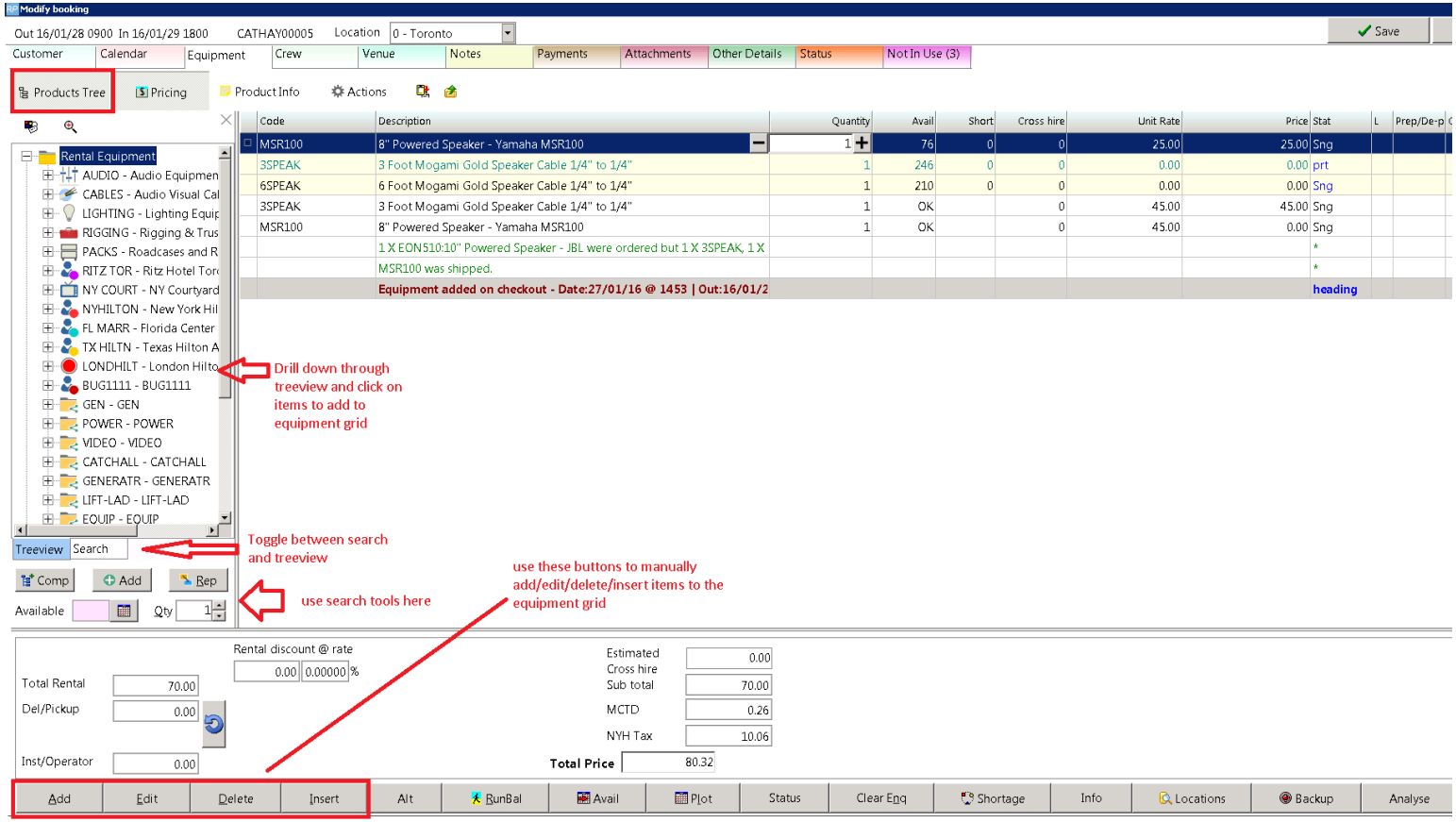


Booking Equipment Grid

Add/Maintain Booking Equipment

There are several ways equipment can be added to a booking.

1. Click on the item in the Tree View of the inventory
2. Search for the product code or description (See operational parameter 175 for default setting)
3. Manually key in the product code
4. At any point in the equipment grid Comment, Sundries and Heading can be added using the 'Add' 'Insert' buttons highlighted in the screenshot below.



Comments allow free text comment lines to be added to the grid. These can be shown on any client facing or internal documentation.

Sundries are open charges where both the incurred cost and the client charge can be tracked. The details are open and can be changed on a booking by booking basis. See Booking operator privilege 'Can enter Sundry Items' to permit/prevent use of sundries by operators on the booking.

Headings allow for multiple equipment dates on the same booking. Headings are useful separators for breakout rooms, day separation, different functions for which normally a new booking would be required. Headings can have separate pricing, separate Delivery and Return dates.

Heading Parameters

- Invoicing Parameter 19 'Disable print of group headings'
- Custom Printing Parameters
  - 13 'Left justify group headings'
  - 4 'Sub totals required on headings'
  - 3 'Remove line spacing for headings and sub totals'
- Operational Parameter
  - 89 'Headings may have their own dates and times
  - 34 'Force the use of headings'
- Barcode Tracking
  - 33 'Adjust pricing and/or heading dates on return
  - 31 'Create an 'Added at Checkout' heading

Pricing

Once equipment is selected for the booking, adjustments can be made to the quantity, price, and discount for each line of equipment. Specific pricing models on a per line basis can be created. See Pricing documentation in knowledgebase for further information on pricing.

Taxes

Tax rates can be applied by clicking on one of the two tax boxes at the bottom of the screen. You can set up overall defaults that will apply to all new bookings as well as customer defaults (see customer properties) that will be applied anytime you select a certain customer. Clicking on the tax boxes in the booking will allow you to set a tax rate for a specific booking.

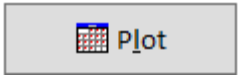
Discounts

Discounts can be applied to the entire booking; there is a separate overall discount for rental/hire and sales products.

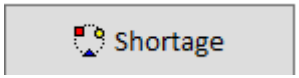
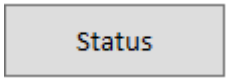
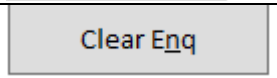
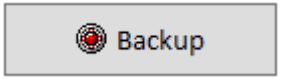
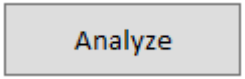
- These will not conflict with any line item discounts. If a discount on the line already exists, the overall booking discount will skip the line amount and apply to other applicable lines.
- There are several other parameters and options that determine whether the extended price of a line is included in the booking discount. See Operational Parameter 90, Pricing parameters 9, 14, 15, 16, 43
- **Lines that are not included in the overall discount will display a * beside the price.** You can hover over the price with the mouse to see the reason the line is excluded from discount. (For instance a product may be set to "Do not discount" or you may not allow package products to be discounted).
- Only **rental/hire** and **sales** items are included in the discount, crew, delivery and sundries are not discounted.
- Operators can be restricted to a certain discount level so they can't apply a discount higher than their limit. You can set this in the operator setup area for each individual operator.

Equipment Grid Icons Explained

From the equipment grid, users have full availability checking. The Running Balance, Availability Calendar, and Product Plot Sheets are all available. From the **Running Balance** users can modify the priority of bookings**. Running balance** is only useful for single items, not package products.

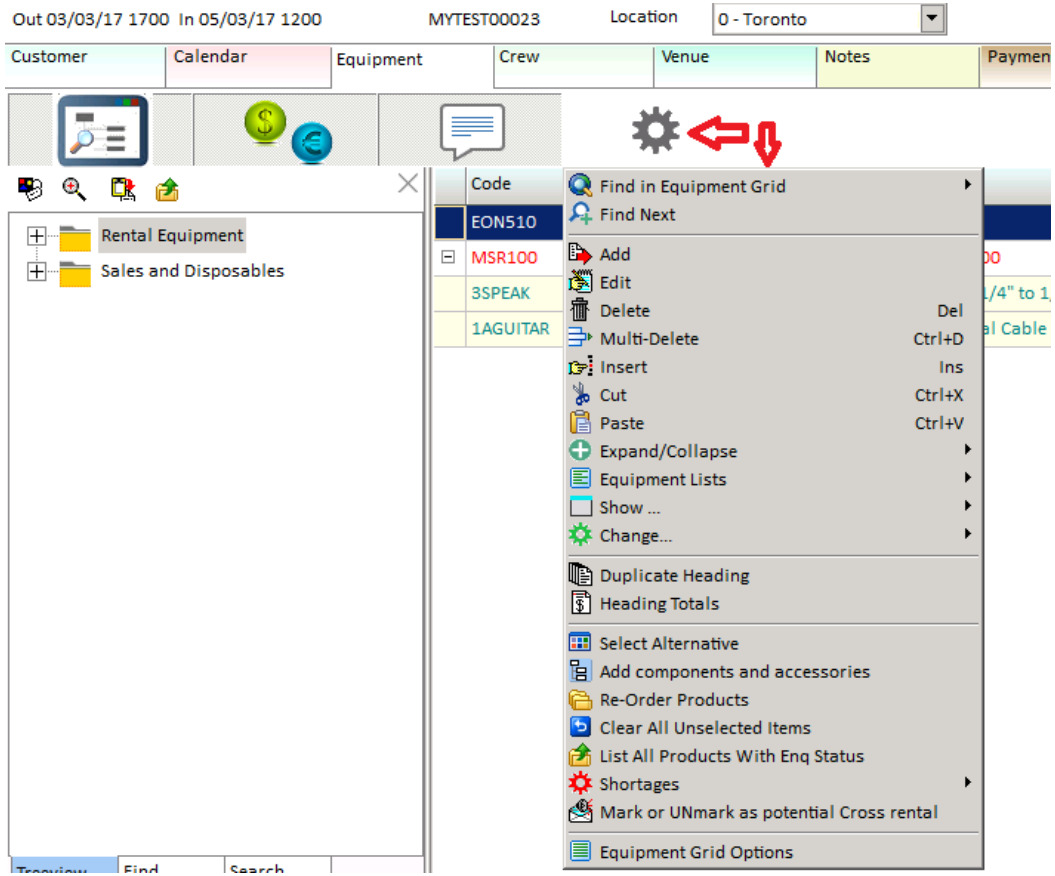
Running Balance		Shows the running balance for the highlighted product. For more details see http://rentp.com/KnowledgebasePDFs/Running%20Balance.pdf
Availability Calendar Icon		This will give the number of items available for a specific product. For more details seehttp://rentp.com/KnowledgebasePDFs/Availability%20Calendar.pdf
Plot Sheet Icon		This will show where each specific item of that product group is and what booking it is on. For more details see http://rentp.com/KnowledgebasePDFs/Plot%20Sheet.pdf

Booking Equipment Grid

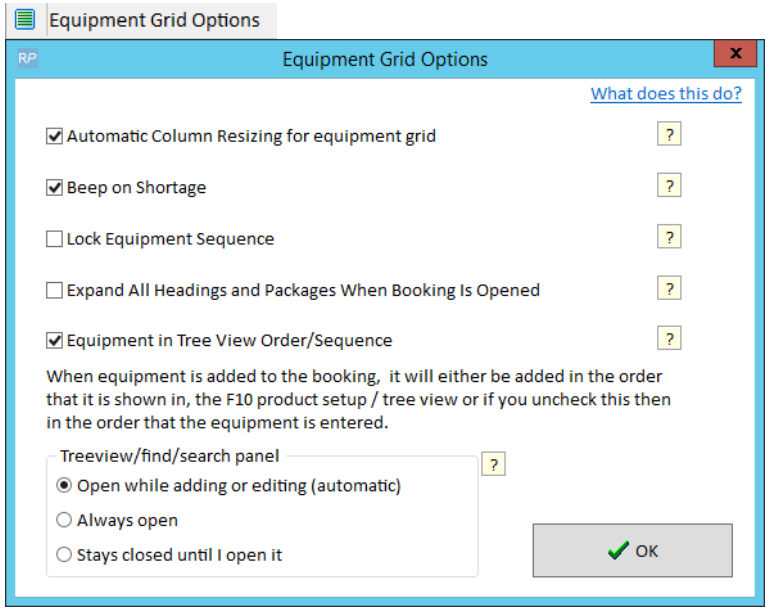
Shortage Resolution		Full shortage resolution is available from each booking covering all the methods available in RentalPoint; Alternatives, Cross Rentals, Purchase of new equipment. For more details see http://rentp.com/KnowledgebasePDFs/Shortage%20Resolution.pdf
Status		Shows the Asset Status of all related assets
Clear Enq		Clears all items with 'Enq' (basically pricing enquiry) line item status
Info		Shows product information on the highlighted item
Locations		Shows product availability at all locations
Backup		Changes the item type of the highlighted item to 'Backup', using the 'Backup' pricing as determined by Pricing Parameter 69. This is a toggle option, to change item back to normal simply click the backup icon again while highlighting the item on the equipment grid.
Analyze		Profit Analysis (accessed from inside a booking) The Analyse button runs the Profit Analysis Report calculated profit margin for a booking. The report breaks down equipment, crew, PO's, and cross rentals. The results are separated into tax, pre tax, and total amounts. This functionality is also detailed outside the booking window in the Reports section of the knowledge-base. See page 4 of document at this link for more information http://rentp.com/KnowledgebasePDFs/ProfitAnalysisRep.pdf

Booking Equipment Grid

Equipment Grid Options Explained

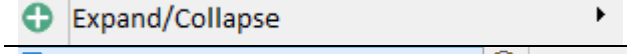


Booking Equipment Grid

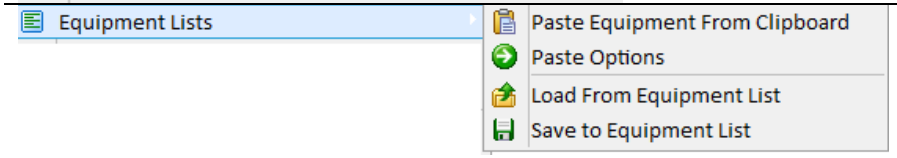


Control your equipment grid display with these options. These options can be taylored for each workstation/server login.

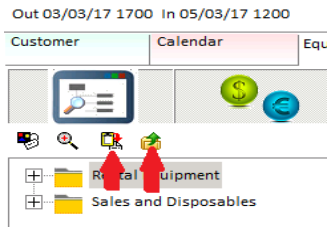
Ability to select and delete multiple equipment lines in the booking



Expand/Collpase all headings/Parts on the equipment grid

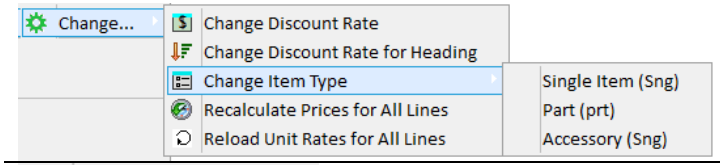


Allows user to save your equipment to a text file/clipboard so that it can be used in other bookings and/or load equipment from a text file/clipboard for use in this booking



See icons also available for load/paste from Equipment list

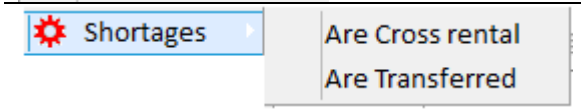
Booking Equipment Grid



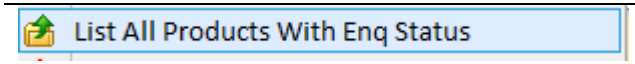
Change pricing, discounts, item types for equipment line items.

Switch out the product for one of the alternatives set up for this product in product setup.

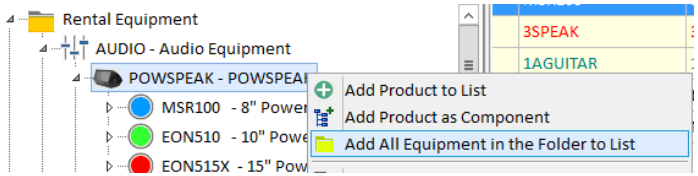
Reorder the products on the equipment grid to product tree view order



Are Cross Rental: Change all line items that have shortages to show cross rental pricing. These items would be excluded from discount depending on your setting for pricing parameter 14
Are Transferred: Change all line items that have shortages to show as transfers which will clear out the cross rental pricing column and allow those items to be discounted.

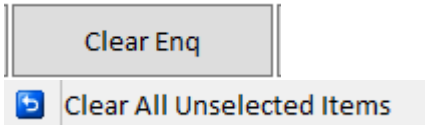


List all Products to the equipment grid with ENQ status (for smaller inventory)



Use option from product treeview for larger inventory so that you add gear from just one folder

Then give each item listed (that you want to keep) an qty OR double click to select

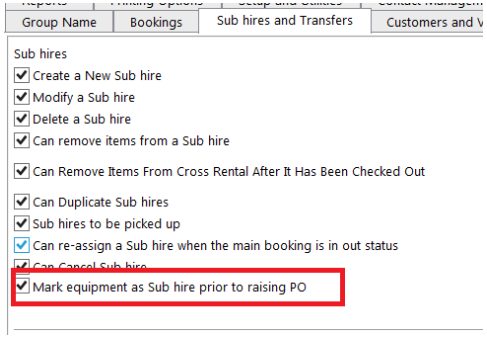
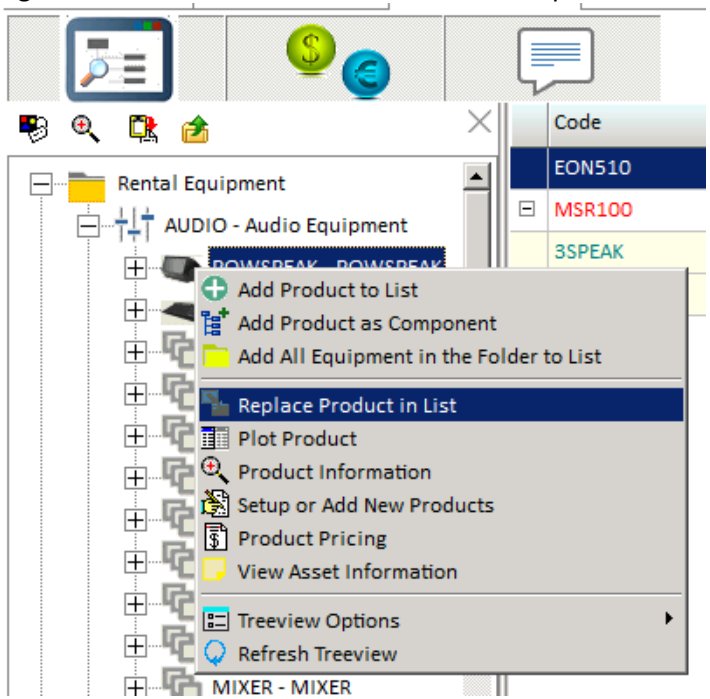


Clear any unselected items with either 'clear' menu option or icon.

See Video demo at this link
https://www.youtube.com/watch?v=Wixtu1ihfSU&feature=youtu.be

This is a toggle which will mark the highlighted item in the booking as a cross rented item, although you're not required to create or attach a cross rental. Then when checking out the booking, the items are automatically placed in the cross rented grid. There is an operator privilege to control access to this option under the 'Sub Hires and Transfers' tab in Setup→Operators functionality.

Booking Equipment Grid



Right Click on the Product Treeview for more options