



Checking out a Booking

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Checking out a Booking

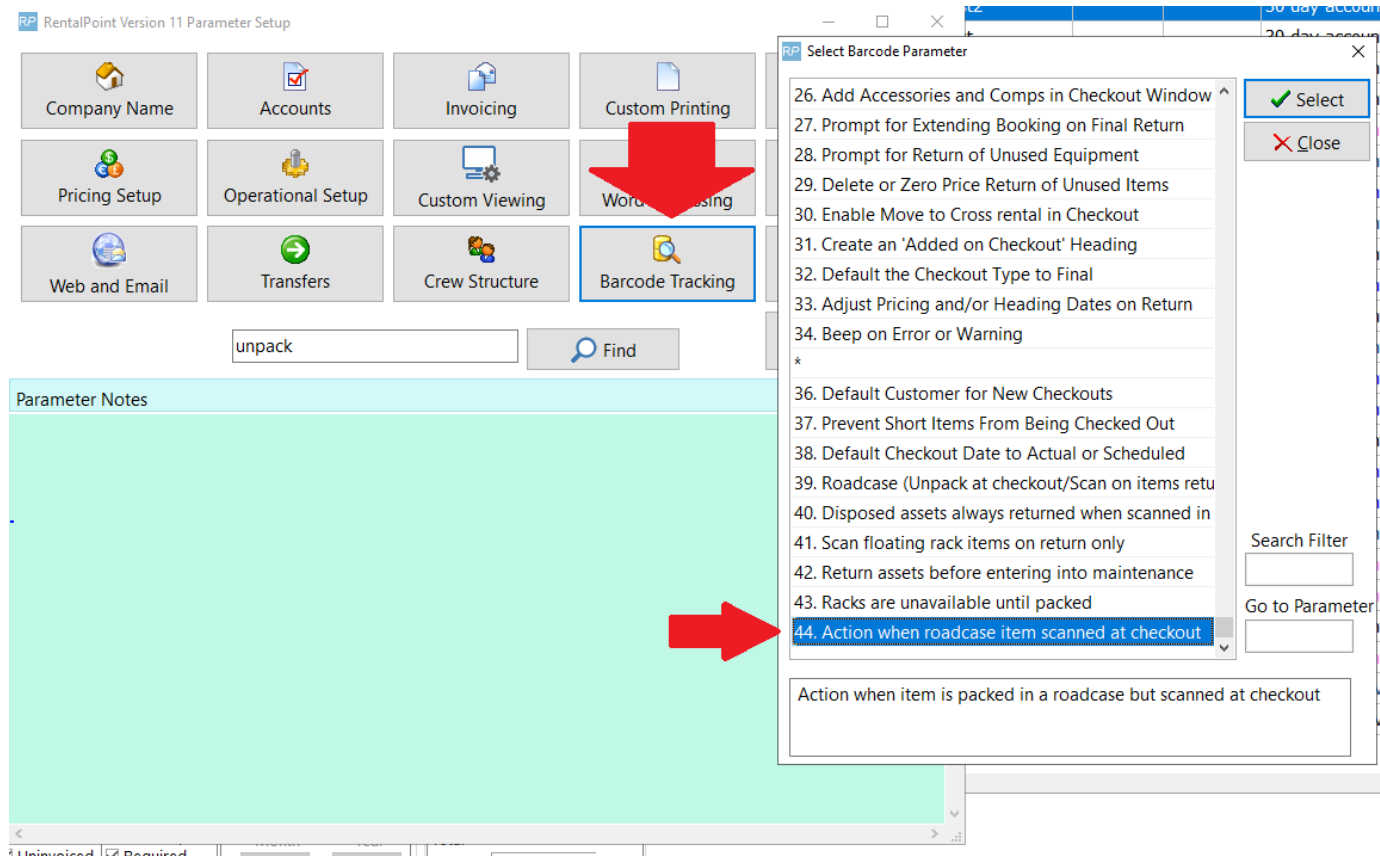
Action when roadcase item is scanned at checkout

Predetermine how RentalPoint should handle items that are packed in a roadcase, but scanned out as a single item during checked session!

Exceptions:

- When RFID is in use, the action is set to 'Do not check out' to ensure that scans of single items by the reader don't unpack the roadcase
- This parameter does not affect racks

Goto Setup-->Parameters-->Barcode Tracking-->44



- Auto-unpack and check out: when an item that is packed in a roadcase is scanned as a single item, it is unpacked from the roadcase and checked out
- Do not check out: Shows an error message and prevents the roadcase item from being checked out



Checking out a Booking

Action when item is packed in a roadcase but scanned as a single item on checkout

Auto-unpack and check out

Auto-unpack and check out

Do not check out

✓ OK

Enter Barcodes Tab

Checking out and returning bookings is the only way to maintain accurate inventory values at any given time. There are several options to customize the checkout window and the checkout process, be sure to take a look at the options offered in Setup → Parameters → Barcode Tracking.

1. Checking out equipment provides immediate feedback for inventory discrepancies on bookings. A booking needs to be in confirmed status to be checked out. To checkout a booking, right click the booking in the main booking grid and select **Checkout**. You may also want to use the Checkout 'speed button' located along the top of the booking grid. Using your handheld scanner, scan barcodes into the list on the **Enter Barcodes** tab. You can also copy and paste from a downloaded list, or manually type the barcode.
2. To view more information on an asset, scan it into the **Scan Barcode** box. If you like, you can click Next to immediately see details, or you can wait a few moments and the system will automatically show you the details. All current information on the barcode is displayed and the system will give you a couple moments to review it. If the barcode is not currently out on another booking, and if it's not in maintenance it's automatically added to the checkout session, and you are returned to the Scan Barcode box.
3. Non asset tracked barcodes can also be scanned into the main list. If you have multiple quantities of an item, say a handful of cables, you can use the **Scan Quantity** option to enter them all at once, instead of scanning them individually.
4. The checkout window also has an option to pack (or unpack) a road case or rack on the fly. Select the Pack or Unpack option, scan your road case and hit enter. You will be taken directly to the road case and rack setup window without having to close your checkout session. Once you've completed your changes to the road case or rack, you'll be returned to the checkout window.

Checking out a Booking

RP Checkout equipment, booking: EINET00008 from Location :0 - 7635 ABP

Enter Barcodes | **Current Session** | Equipment Out | Returned | Losses

Scan One or More Barcode(s)

1.

Checkout Barcodes

2.

Scan Barcode

Next

Booking Notes

3.

4.

(Shortcut Ctrl-S)

Enter road case barcode to pack/unpack

Scan Quantity

Pack

Unpack

Serial # | Search

Checkout Date: 19-06-27 | Checkout Time: 1312

Type: ☒ Partial ☐ Final

Check | Open | Info | Save

Identify | Shortages | Product Setup | Asset Status | Cancel

Current Session Tab

Once all items are scanned click **Checkout Barcodes** to move to the next tab. This window contains four main areas and can be a little overwhelming for new users. Don't worry, you'll be a pro in no time and zipping through these areas like you've known them forever.

1. The **Equipment to be Scanned** (top left) is generated from the booking. This is a listing of all items on the booking that have not been checked out yet.
2. The **Equipment Scanned this Session** (bottom left) are barcodes that you have scanned on the Enter Barcodes tab. These barcodes are verified by the system and any errors are displayed in the Errors and Warnings area at the bottom of the screen. Errors need to be resolved before the asset can be added to the checkout session. If an error occurs the system will beep at you. Some users find this quite annoying, but no worries you can disable it using Barcode Tracking #34 – Beep on Error or Warning.
3. The **Equipment ... [non bar code tracked]** (top right) is generated from the booking. It holds bulk items or non-asset tracked items that the operator has counted and reported to the system.

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- The **Cross Rented Equipment** (bottom right) area is also generated from the booking and lists any items that were short or have been assigned to cross rentals.
- Change the display order of checked out items with the 'Order' button.

RP Checkout equipment, booking: MYTEST00101 from Location :0 - Toronto

Enter Asset Numbers Current Session Equipment Out Returned Losses

Equipment to be bar code scanned in this booking

Product Code	Description	Qty	Qty
MSR100	8" Powered Speaker - Yamaha MSR100	1	0
NBM1-1	1 Foot RapcoHorizon NBM1 XLR to XLR Aud	1	0

1.

5

Equipment entered / scanned this session

Asset Number	Description	Qty	Type	Note

2.

Order Move

Cross Rent Nonbarcode Select All Unselect All

Cross rented equipment checked out this session

Product Code	X-Rent	Description	Qty	Checked Out
MSR100	SHORT	8" Powered Speaker - Ya	1	0
NBM1-1	SHORT	1 Foot RapcoHorizon NE	80	0
3SPEAK	SHORT	3 Foot Mogami Gold Sp	400	0
1AGUITAR	SHORT	1 Foot Mogami Platinun	200	0
FRES300		Location Fresnel - 300 W	1	0

3.

Errors and warnings Delete item Notes

Asset Number	Message

4.


+ Errors - Errors Show Errors Open Folder Display errors after checkout

Checkout Date Checkout Time Type

06-27-19 1334 Partial

Check Open Reserved Assets Info Save

Identify Shortages Product Setup Asset Status Close



 Outside supplied equipment will now appear in the cross rented / hired equipment grid when checking out a booking and will be highlighted in green to differentiate it from equipment assigned to a cross rental PO or short equipment.




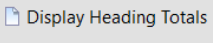
Checking out a Booking


RP Heading - the equipment below use these dates and times X

Booking venue

Venue room  

☐ Update heading with this room name

Delivery date  Time 


Return date  Time

Days Using (Note : Click on/tab into the days using field to recalculate b:

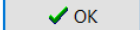
Days charged


Equipment supplied


☐ Our equipment - Equipment supplied in house, or cross rent some items

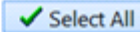
☒ Outside supplied - Cross rent all the equipment, equipment not reserved 

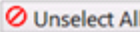
Note: Headings are used to split equipment into separate venues, rooms, dates and/or times (commonly called "breakouts"), they are not to be used as comment lines. If the booking dates are changed then each heading date and/or times must also be changed.



Cross Rent 

Nonbarcode 

Select All 

Unselect All 

Cross rented equipment checked out this session

Product Code	X-Rent	Description	Qty	Checked Out
J600		Stereo 200w Amp	1	0
ZPE1000		ZPE 1000: 1600w mosfet	1	0

Equipment Currently Out / Returned Equipment Tabs

These tabs are fairly straightforward. They list the items that are currently checked out to the booking and items that have been checked out and returned (respectively).

Additional Buttons and Options

Most buttons in the checkout window are labelled clearly or have hints when you hover over them. Here's a quick listing of what the different buttons and options do:

Move – you may find at the last moment that you don't have this item in stock. This button moves a barcoded item into the cross rental area so you can check it out as a cross rented item.

Cross Rent – similar to the Move button. You may find you don't have a non barcoded item in stock and need to move it to the cross rental area.

Non Barcode – move a cross rented item to the non barcoded area.



Checking out a Booking

Select All / Unselect All – automatically selects (and unselects) all items in the non barcode and cross rental grids. This will save you time in entering a quantity for each item in the list. You can disable these buttons via Barcode Tracking #12.

Delete Item – removes a barcode from the list of scanned items.

Notes – displays the notes for the currently selected barcode.

Checkout Type – the Partial option allows you to save the checkout and notify the system that you still have more items to be checked out, the booking will remain in B status. The Final option means that no additional equipment will be added. Any equipment not checked out will be removed and the price adjusted. The booking will be set to O status.

Checkout Date and Time – this is automatically generated when you open a checkout session, however you can modify the date and time if you like. Be advised if Operational #6 – Checkout Affects Availability is enabled, this may affect other bookings in your system.

Check – runs a discrepancy report to ensure everything has been checked out. Any additional equipment will be flagged.

Identify – opens the contact search window.

Open – opens the booking that you're attempting to checkout.

Shortages – runs a report of all shortages for the currently selected booking.

Product Setup – opens the F10 area.

Reserved Assets – runs a report of all assets that are reserved for the currently selected booking.

Asset Status – Opens the Asset Status window where you can see how each asset is currently being used.

Adding Items to the Booking at Checkout

When items NOT on the booking are scanned during checkout, these items will be added to the booking.

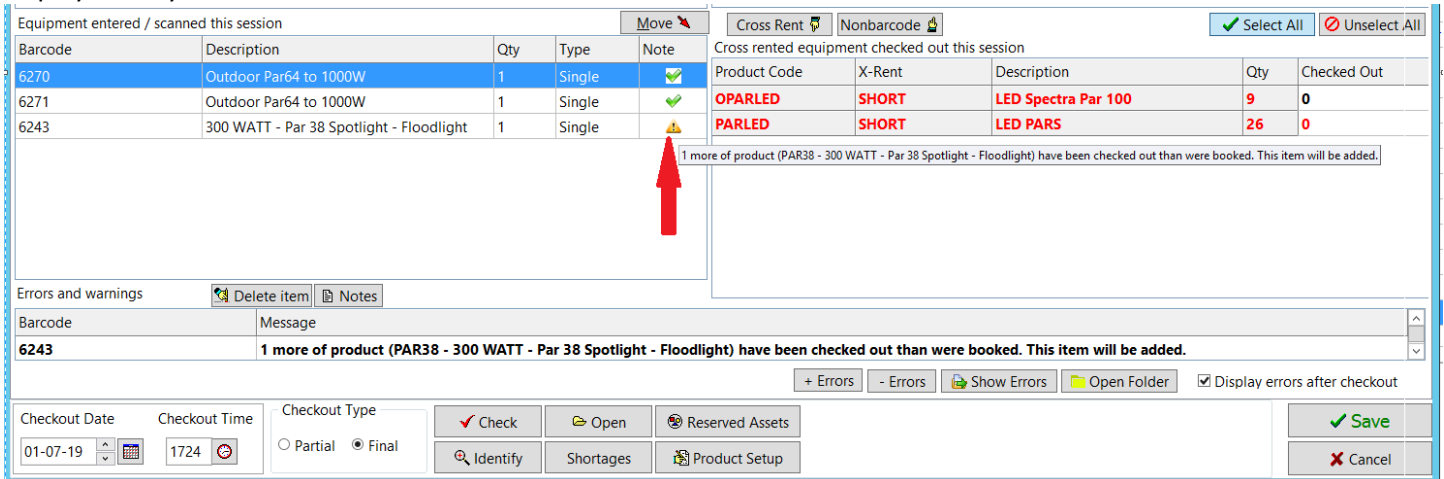
Parameters

- Barcode Parameter 31 'Create an 'Added at Checkout' Heading will determine if these items are added to the equipment grid without or without an 'Added at checkout' heading.
- Barcode Parameter 13 'Equipment Added at Checkout Charging Option' will determine the pricing used for items added

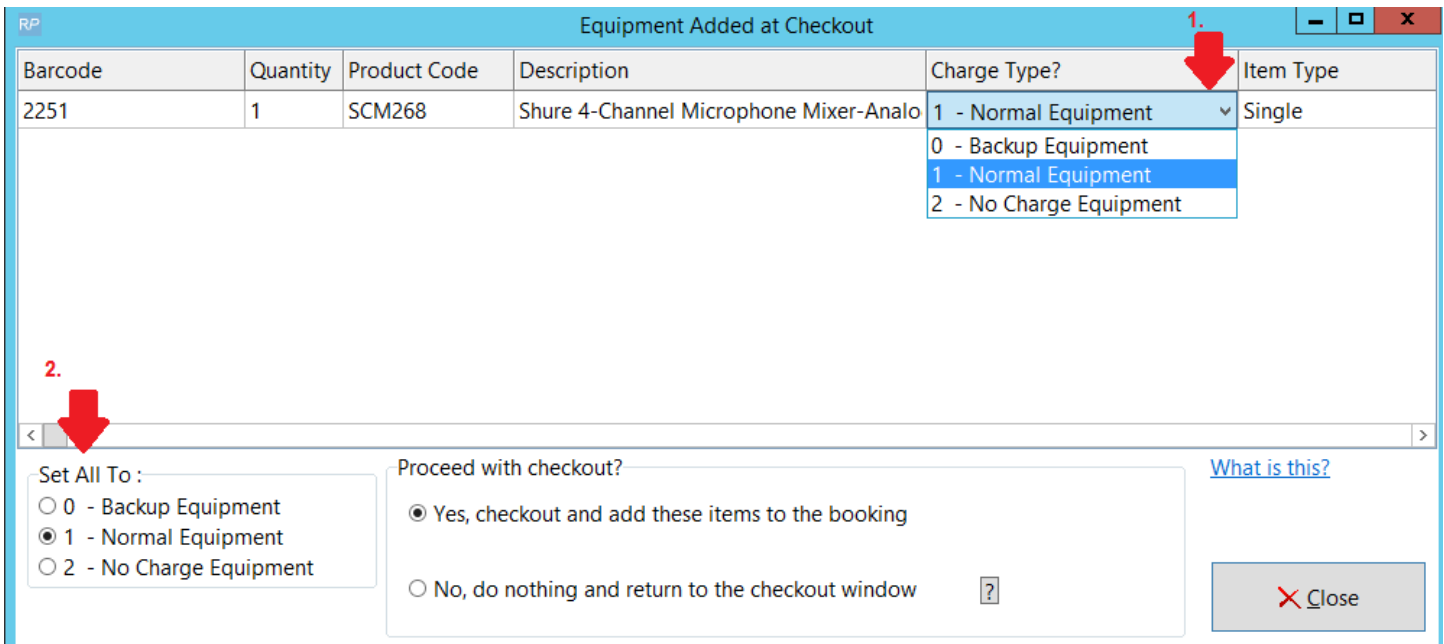
How It Works

Checking out a Booking

Scan items out as normal, items NOT on the booking will be flagged as 'extras' in the errors and warnings section of the checkout window. An icon will show to the right of gear scanned showing either successful scan or an error which will display when you hover over the 'error' icon.



If Barcode Parameter 13 is enabled, then an 'Equipment Added at Checkout' window will pop up showing all items added at checkout and prompting the user to choose the charging option



The operator can change the charge type of any line from the default.

- Normal equipment is charged at the normal rental price
- Backup equipment is given the backup discount
- No charge equipment is given a zero price
- Change the charge or item type of a single line by clicking in on the grid and selecting a




Checking out a Booking

new type from the drop-down (see illustration 1 on screenshot above)

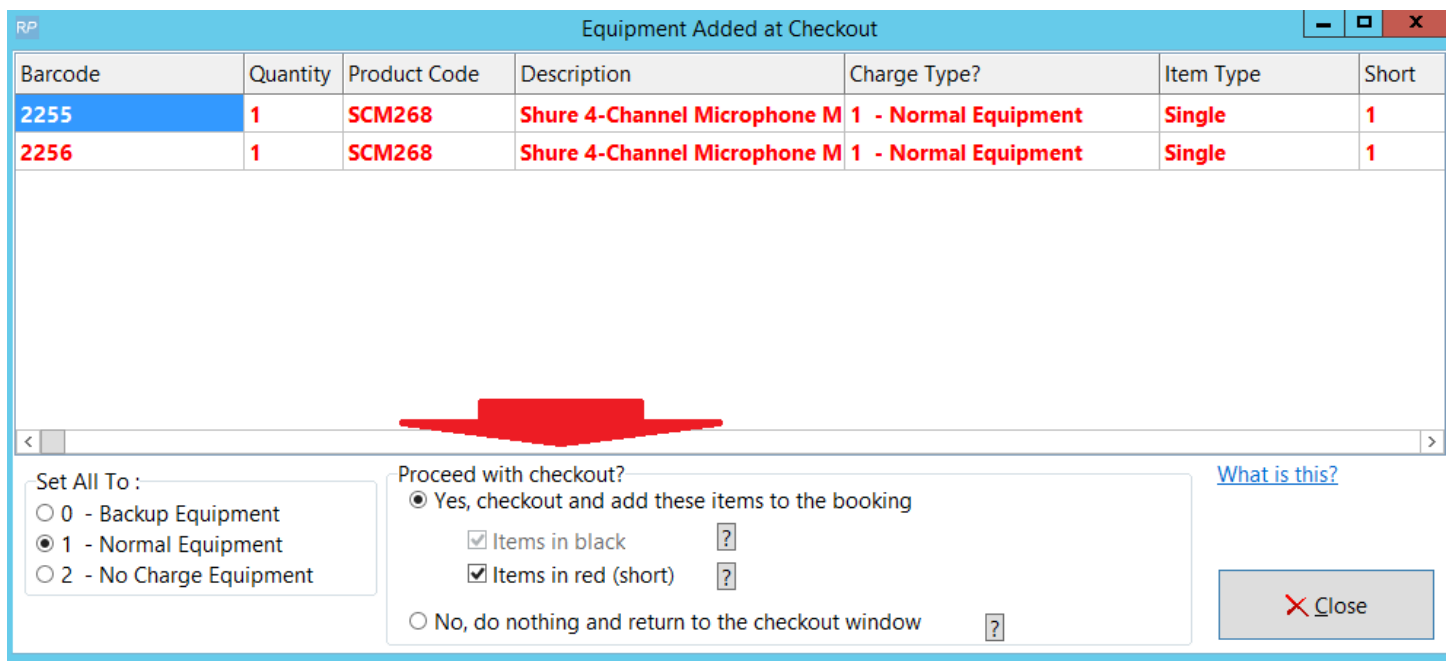
- Change the charge types for all lines by selecting a new option from the 'Set All To' option group (see illustration 2 on screenshot above)

In addition, the item type can be set to 'single' (normal charge item) or a 'component'; Components won't be charged to the customer but the price will still be included on certain financial reports.

 The checkout process is locked once the user hits save on the checkout window. If the Equipment Added at Checkout window is left open for more than 5mins, it will automatically close and the user will need to hit SAVE again to save the checkout. This approach will ensure that users don't leave a job mid-checkout, thus locking all other users out of the booking.

Shortages Added at Checkout

When the 'Prevent checkout of short items' option is checked (under operational parameter #6), then the availability of all new items will be checked when checkout is saved. If there are any shortages caused by the new items, the added at checkout window will display and give the operator the opportunity to go back and manually remove some equipment or continue to save the checkout.



Barcode	Quantity	Product Code	Description	Charge Type?	Item Type	Short
2255	1	SCM268	Shure 4-Channel Microphone M	1 - Normal Equipment	Single	1
2256	1	SCM268	Shure 4-Channel Microphone M	1 - Normal Equipment	Single	1

Set All To :

☐ 0 - Backup Equipment

☒ 1 - Normal Equipment

☐ 2 - No Charge Equipment

Proceed with checkout?

☒ Yes, checkout and add these items to the booking

☒ Items in black

☒ Items in red (short)

☐ No, do nothing and return to the checkout window

[What is this?](#)

[Close](#)

If the operator can access rights that allow them to checkout short items they will see the options in the 'Proceed with checkout?' box above.

- 'Items in back' is always selected and can't be changed. These are the non-short items that were scanned and will be checked out if 'Yes' is selected.
- 'Items in red (short)' will only display for operators with access rights to checkout short items. When 'Items in red (short)' checkbox is checked, the items appearing in red will be checked out. This may cause shortages to occur on other bookings overlapping the one being checked out. These bookings will show up on the shortage list.
 - If the 'Items in red(short)' option is NOT selected by the user; the short items will be removed when the operator selects 'Yes, checkout and add these items to the booking'.
 - The error list will display after save with these items highlighted so the operator can pick them out and place them back on the shelf.

Proceed with Checkout?

- Once all the needed options are selected the operator can choose to continue with the save process or to go back and scan more equipment or remove some equipment that caused shortages.
 - Yes, checkout and add these items to the booking - Will continue with save and add the new items to the booking (less any shortages if they have not been included)
 - No, do nothing and return to the checkout window - Will stop the save process and go back to the checkout window to continue scanning etc...



The checkout process is locked once the user hits save on the checkout window. If the Equipment Added at Checkout window is left open for more than 5mins, it will automatically close and the user will need to hit SAVE again to save the checkout. This approach will ensure that users don't leave a job mid-checkout, thus locking all other users out of the booking.

Lock for Scanning/Checkout

Why is it used?

- If tracking the status of Cross Rental Bookings (note this is NOT necessary to affect availability. If Cross Rented bookings are not checked in/out Rentalpoint will count them as available from the warehouse in and out dates on the cross rental booking)
- When the cross rented equipment arrives at the warehouse, it has the other companies' barcode labels attached to it (or no barcode labels at all). The cross rented item still needs to be checked out and returned on the booking in order to change the booking status, however the equipment needs to be treated as 'non barcode' scanned.
- There have been times when warehouse staff have scanned the barcodes on the cross rented equipment. The result is the system does not recognize them as they are not in the database. In some cases they may actually match a barcode that is in the database by co-incidence, only because both companies have used the same barcode number. Usually the barcode number in question is attached to different equipment. Locking the Cross Rental for scanning allows the user to better monitor scanning of cross rentals with correct barcodes.

Where is it found?

- For regular bookings, the yellow lock button on the Status Tab of the booking will lock bookings for checkout.
- For sub/cross rental bookings, the yellow lock button on the Details Tab will lock/unlock bookings for checkout
- By default
 - all bookings will be unlocked
 - all cross rentals will be locked

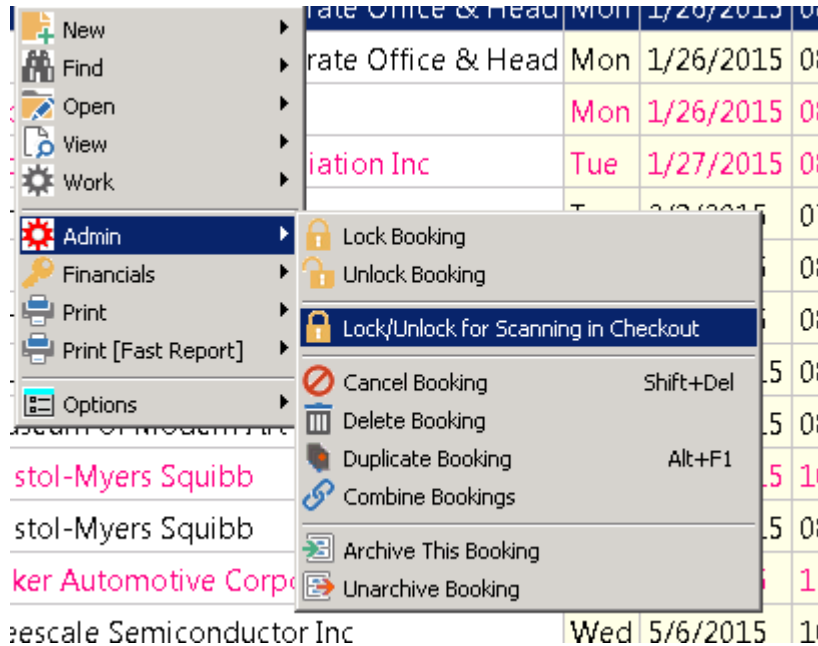


Locked for Scanning

Checking out a Booking

How does it work?

- If an order is unlocked, you can scan items (or manually enter) in the checkout window.
- If an order is locked, you can't scan assets (the checkout tab is not available in the checkout window), you can only flag NON tracked items with a manual qty.
- To lock/unlock a booking simply open the order and click the lock icon, or from the menu with the booking highlighted, Right Click→Admin --> Lock/Unlock





Checking out a Booking

Parameters

Operational Parameter #206 'Lock booking for scanning on final checkout'

When enabled, all bookings will be locked for scanning when a final checkout is saved against the booking. This means no more items can be checked out against the booking unless it is first 'unlocked for scanning/checkout' by a user with that operator privilege. When a booking is locked for scanning, the 'Enter Barcodes' Tab will not appear as an option.