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How does RentalPoint Interface with Google Docs?

Why Integrate with Google Docs?

A Little History

Over the years we have used many methods to send client facing documents such as quotes, proposals, estimates, confirmations, delivery sheets, invoices and receipts to clients and prospects. Those of us that are old enough to remember; in the 80's we used snail mail or couriers, in the 90's we started to print and then fax, then around the turn of the century we started printing to PDF and then attaching this PDF to email and sending.

A More Modern Approach

Now with arrival of Google drive, RentalPoint can upload the client facing document and then you can share it with the recipient.

The Pros and Cons

As for Pros / Pluses, there are many:

- Because Google drive has a light end office Suite built into it, these client facing documents can be opened for editing so that last minute finishing touches can be made for example to formatting. Then send to the recipient by sharing the document. When sharing you select "view" only, as you do not want the recipient to be able to make changes to the document.
- A major pro/plus is that Google docs is free, therefore saving you from having to purchase Office licenses in the future.
- Another plus is that large files such as images, videos and other media can be shared with the recipient without having to attach them to email (as only the link is sent).
- Client facing documents will be available anywhere there is an Internet connection, no need to use remote desktop connection to the server.

Cons:

- Since Google docs is a light end Office suite it does not currently support many of the advanced formatting features that we are used to using in Office, in particular the



RentalPoint Google Drive Integration

use of tables is simple. For this reason all existing Office templates must be simplified / reformatted before they can be used with Google docs.

- If you have a slow Internet upload speed then this option may be too slow for general widespread use.
- RentalPoint generates a new client facing document every time a new version of document is generated, this leads to thousands of documents over time and requires many GIGABYTES of storage. Since this storage would now be on Google drive then this must be paid for. At the moment this cost is not significant (per GIGABYTE), and the costs for storage are generally going down at the moment.

How does RentalPoint Interface with Google Docs?

The actual interface is accomplished using Google Drive API.

Once RentalPoint has been configured, all client facing documents that use a template to be generated, will automatically be uploaded to Google drive, the document can be opened for editing or viewing. Then the document can be shared with the recipient.

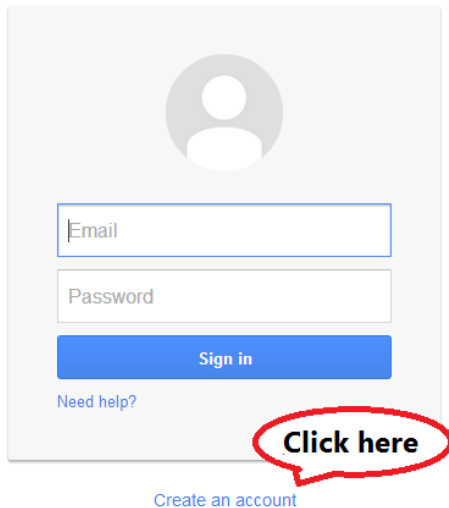
Another option available in RentalPoint is the ability to carbon copy the documents to Google drive, this means the document will still be saved and opened locally (on your server or desktop), but a carbon copy will also be uploaded to the shared Google docs folder.

Setting Up Your Main Google Account

- Create a new corporate Google account, you can do this in Google by clicking on the link to create a new account as below –



Sign in to add another account



The image shows the Google sign-in interface. It includes a profile icon placeholder, an 'Email' input field, a 'Password' input field, and a blue 'Sign in' button. Below the button is a link that says 'Need help?'. At the bottom, there is a link that says 'Create an account'. A red circle is drawn around the 'Create an account' link, with the text 'Click here' written inside the circle.

Create your Google Account

One account is all you need

A single username and password gets you into everything Google.



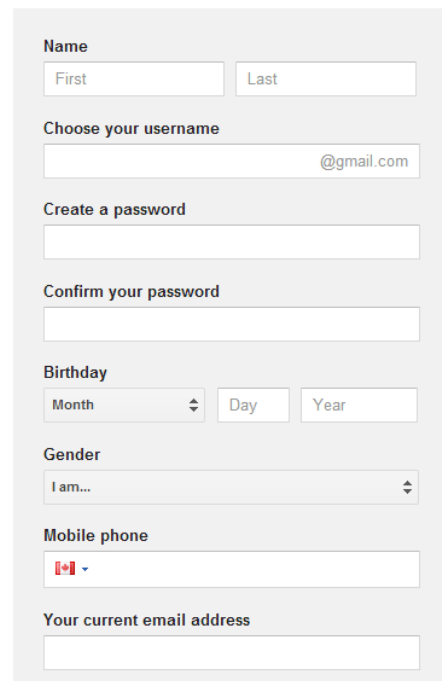
Make Google yours

Set up your profile and preferences just the way you like.



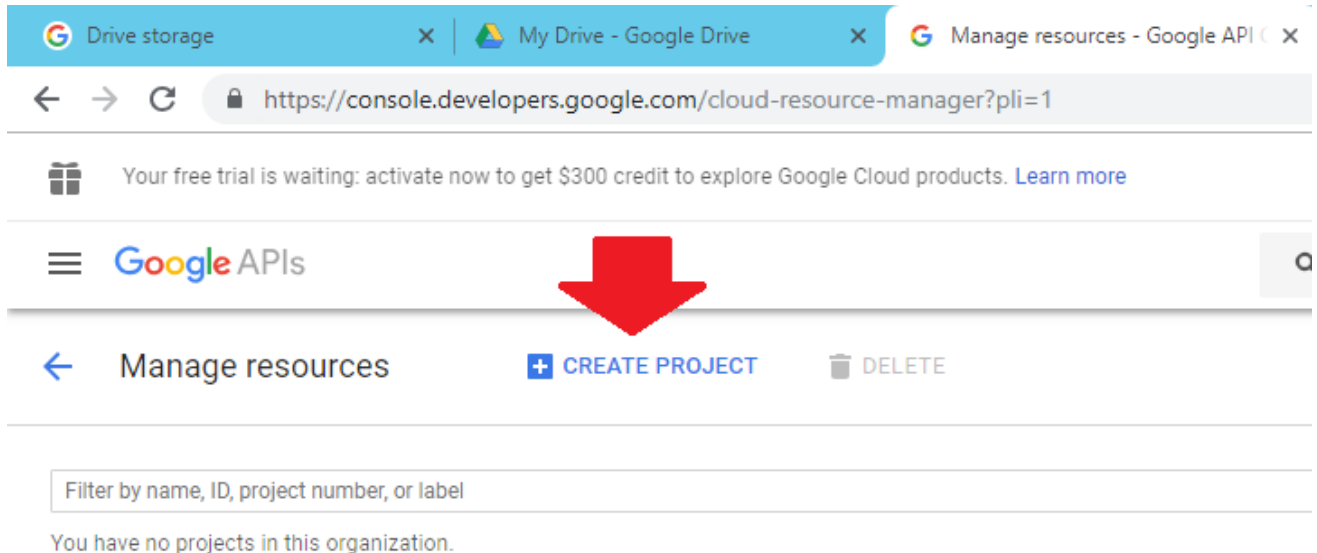
Take it all with you

Switch between devices, and pick up wherever you left off

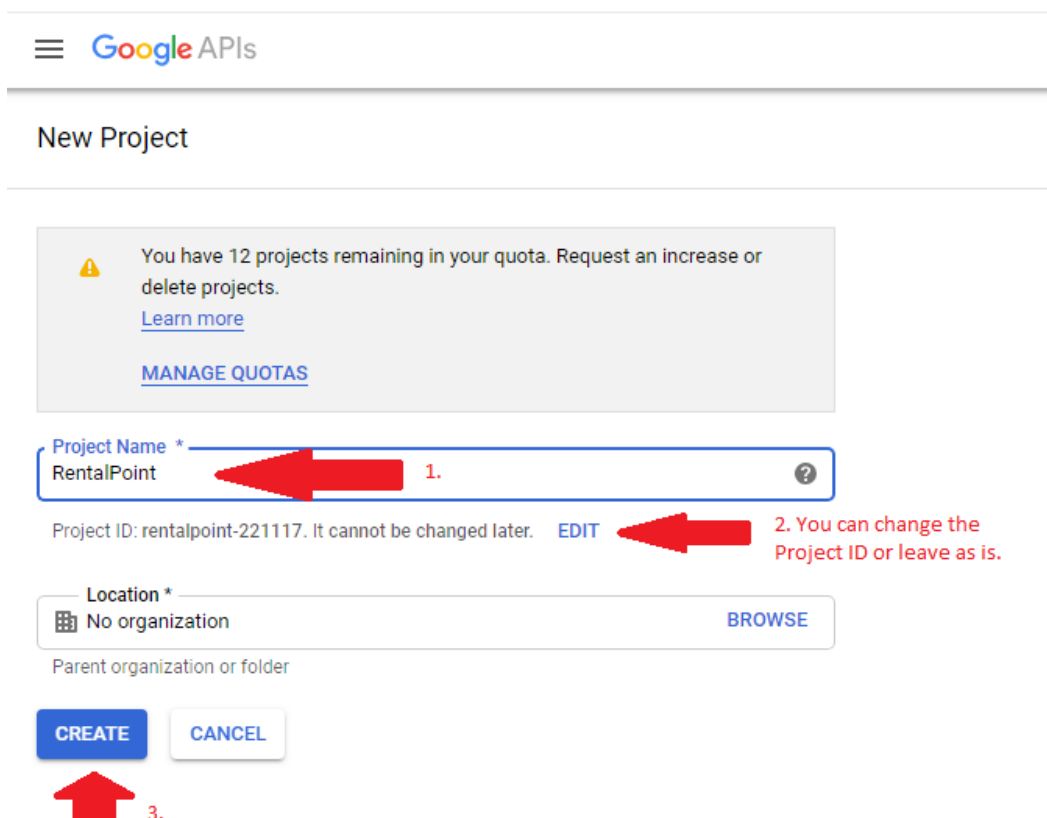


The image shows the Google account creation form. It includes fields for 'Name' (First and Last), 'Choose your username' (with a dropdown menu), 'Create a password', 'Confirm your password', 'Birthday' (Month, Day, and Year), 'Gender' (with a dropdown menu), 'Mobile phone' (with a country code dropdown), and 'Your current email address'.

- This new corporate account will only be used to setup the Google drive integration, no emails will be sent or received using this account.
- From Google Developers Console, set up your Google Account for Google Drive usage
 1. Go to <https://console.developers.google.com/project>
 2. Create your project (should be created within CORPORATE Google Account) :



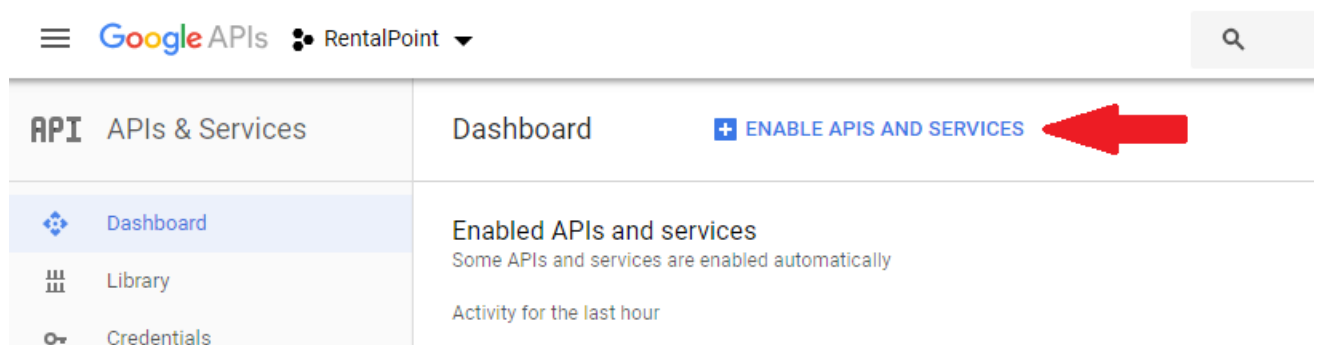
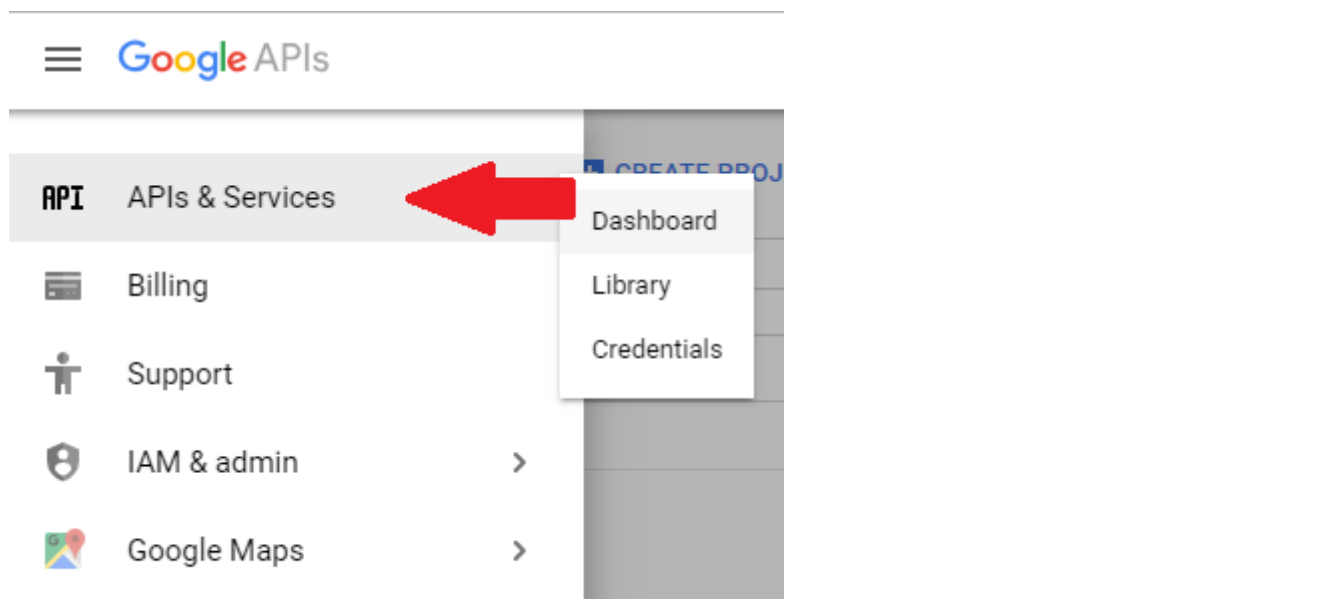
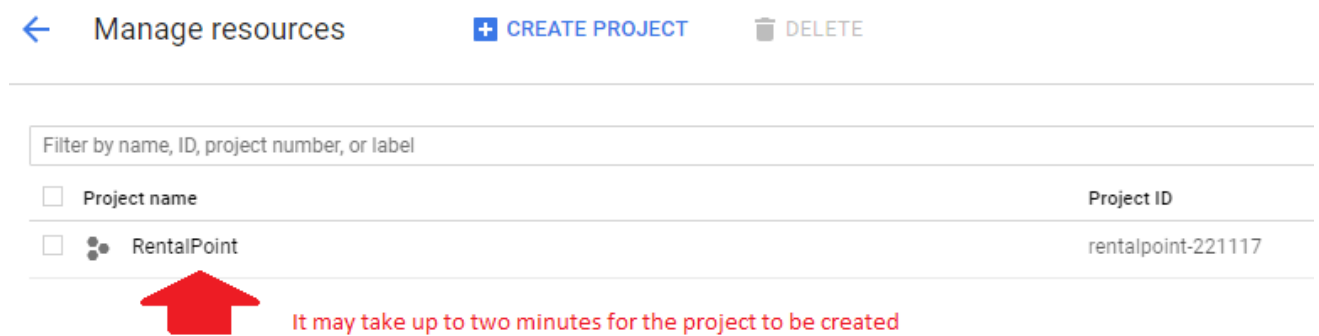
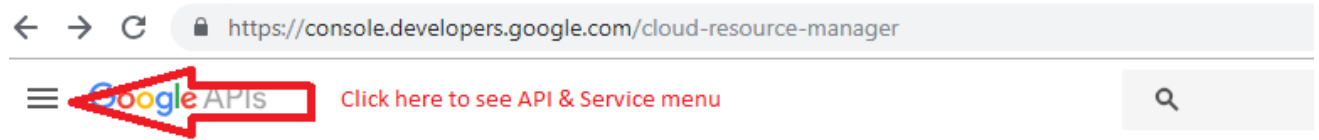
3. Enter project name */id**:



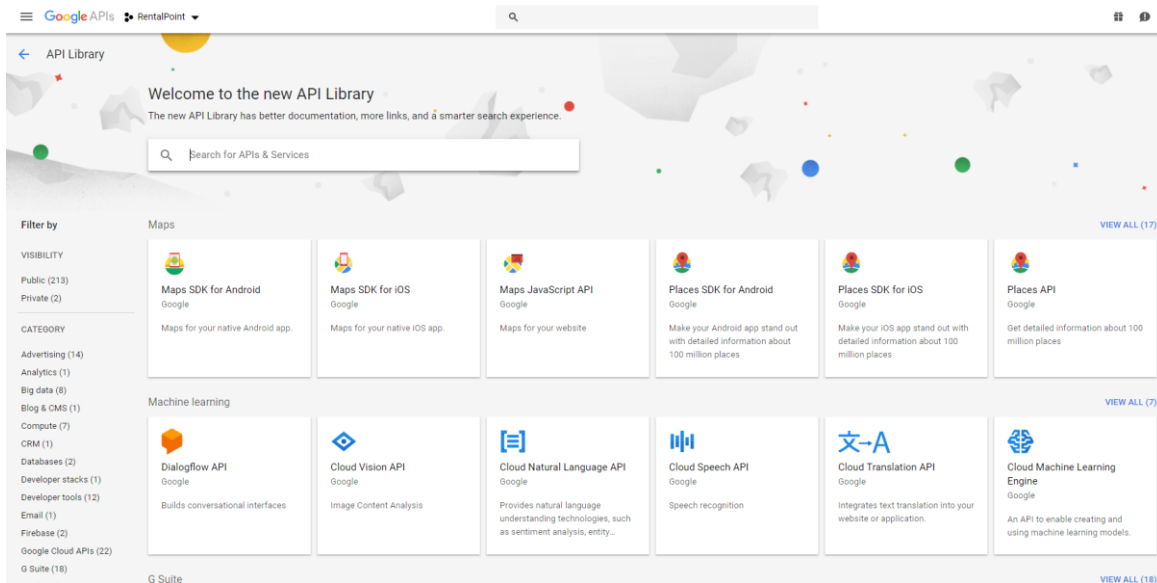


* The project name is only used in the Console.

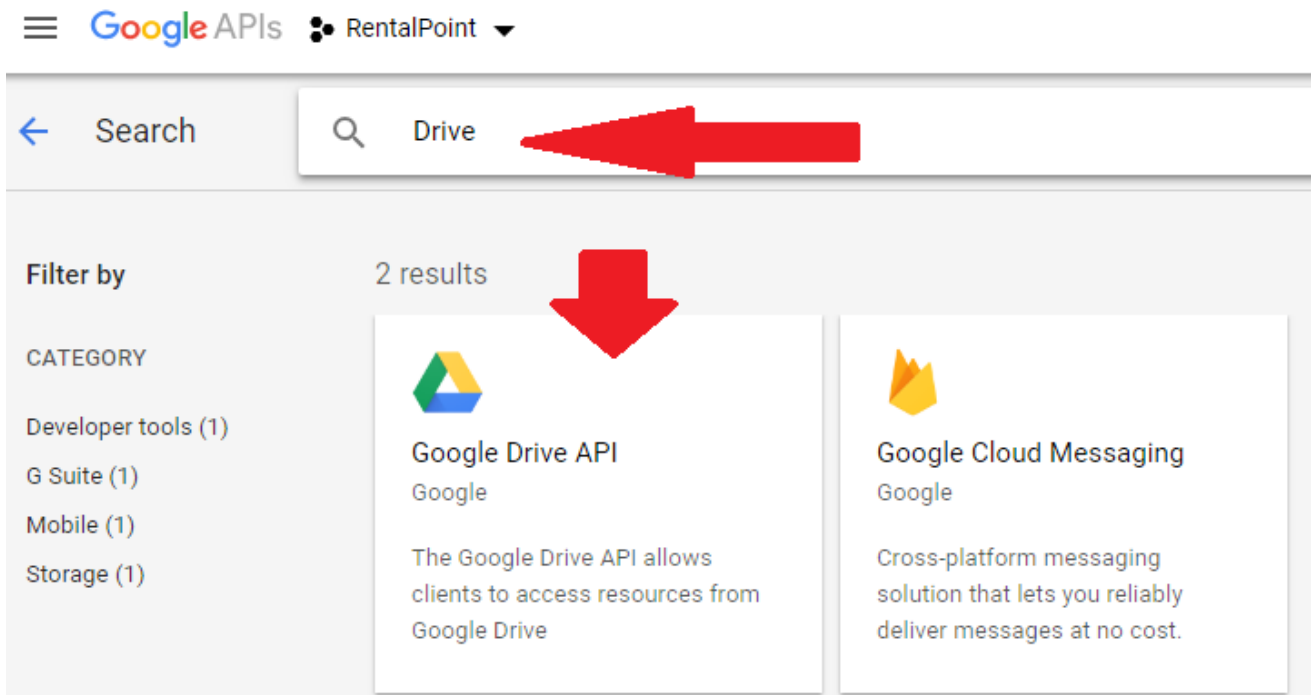
** The project ID is used to uniquely identify your project. Once selected, this identifier cannot be changed.



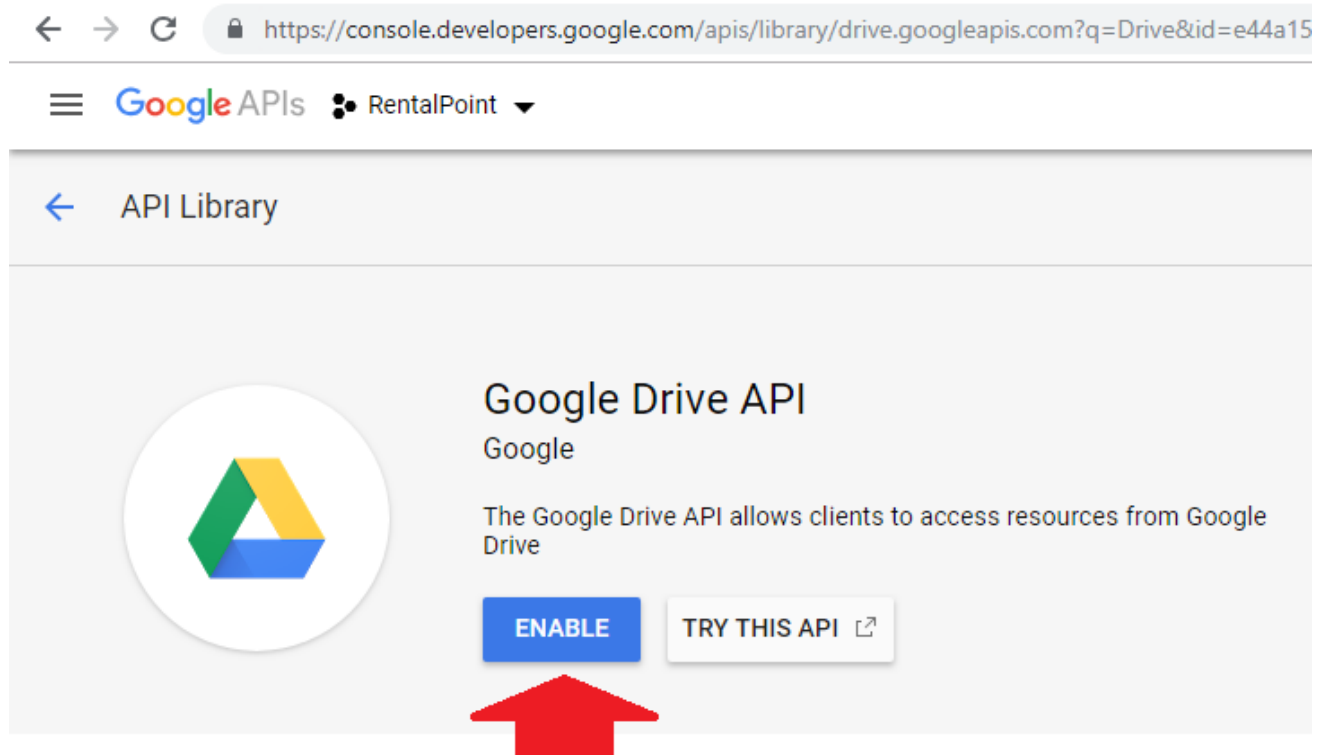
APIs & auth will display, Enable the API's marked below



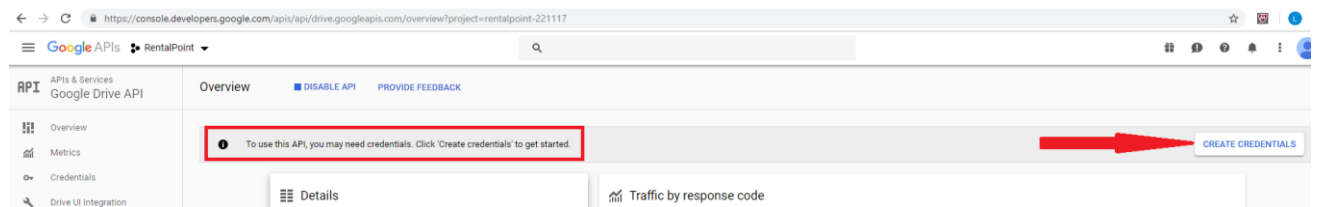
Click the "Drive API" option as shown below -



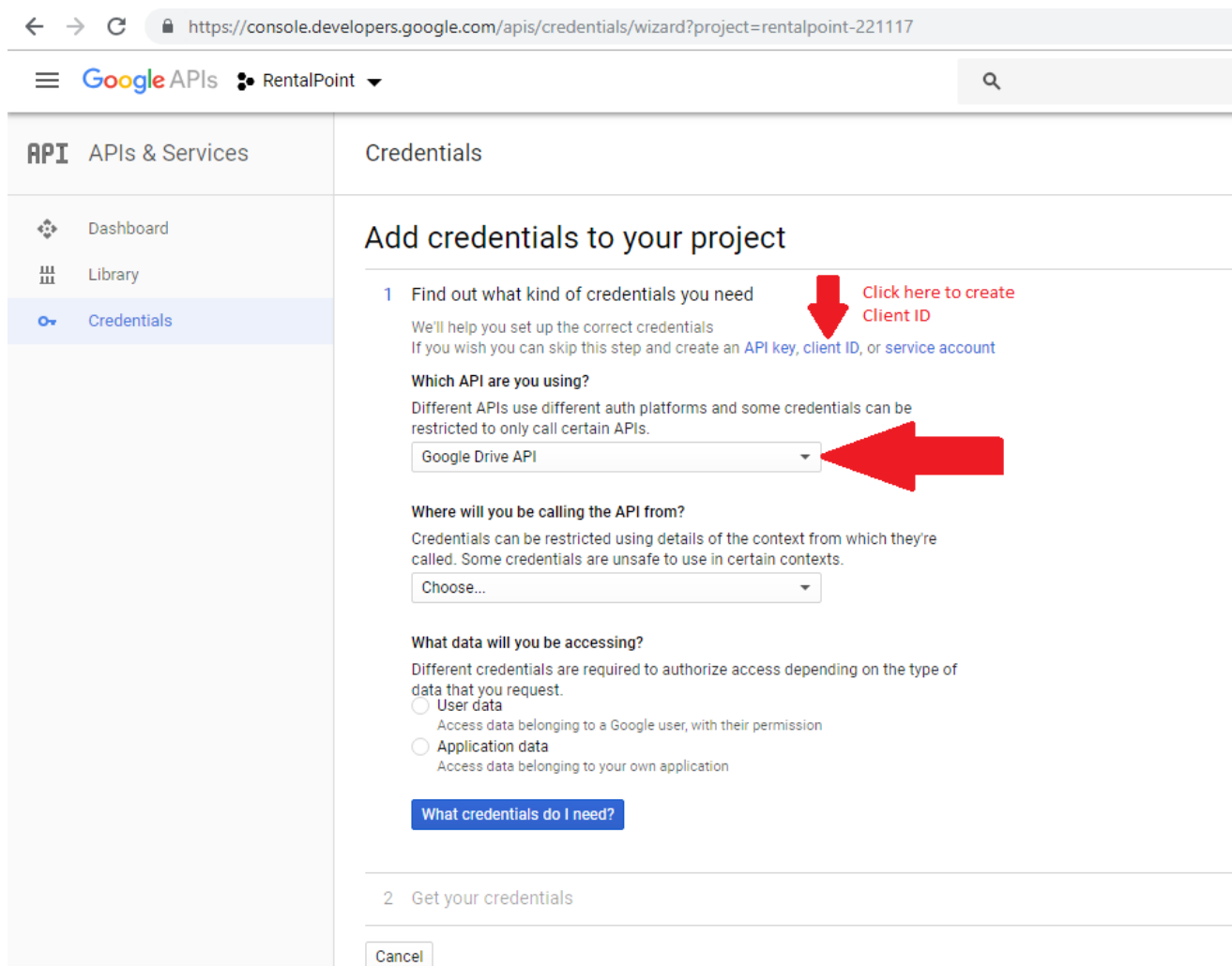
The next window should look like the below, click on "Enable".



Then create credentials by clicking the button shown below –



Client ID creation:



← → ↻ <https://console.developers.google.com/apis/credentials/wizard?project=rentalpoint-221117>

Google APIs RentalPoint

API APIs & Services

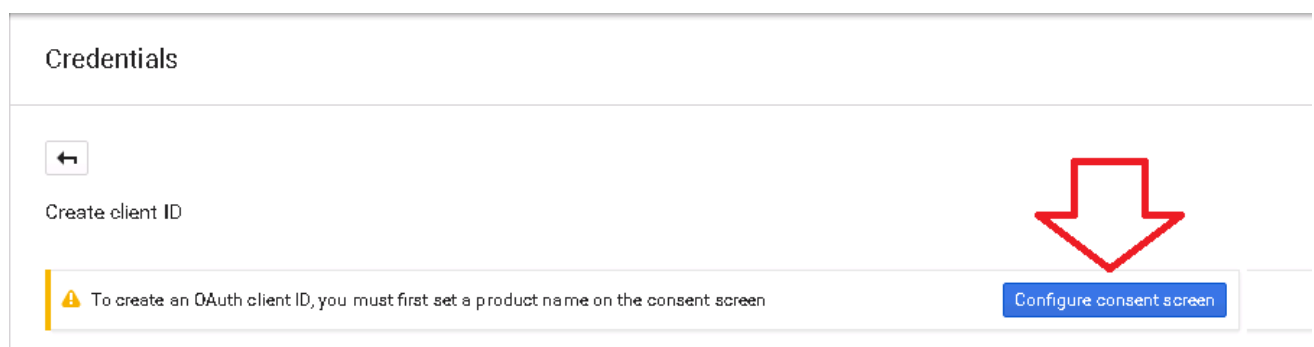
Dashboard
Library
Credentials

Credentials

Add credentials to your project

- Find out what kind of credentials you need
We'll help you set up the correct credentials
If you wish you can skip this step and create an [API key](#), [client ID](#), or [service account](#)
[Click here to create Client ID](#)
Which API are you using?
Different APIs use different auth platforms and some credentials can be restricted to only call certain APIs.
Google Drive API
Where will you be calling the API from?
Credentials can be restricted using details of the context from which they're called. Some credentials are unsafe to use in certain contexts.
Choose...
What data will you be accessing?
Different credentials are required to authorize access depending on the type of data that you request.
☐ User data
Access data belonging to a Google user, with their permission
☐ Application data
Access data belonging to your own application
[What credentials do I need?](#)
- Get your credentials


Cancel



Credentials

←

Create client ID

 To create an OAuth client ID, you must first set a product name on the consent screen

[Configure consent screen](#)

Google APIs

RentalPoint

APIs & Services

Dashboard

Library

Credentials

Credentials

OAuth consent screen

Domain verification

Before your users authenticate, this consent screen will allow them to choose whether they want to grant access to their private data, as well as give them a link to your terms of service and privacy policy. This page configures the consent screen for all applications in this project.

Verification status
Not published

Application name ?
The name of the app asking for consent

RentalPoint

Enter Product name and click SAVE

About the consent screen

The consent screen tells your users who is requesting access to their data and what kind of data you're asking to access.

OAuth Developer Verification

To protect you and your users, your consent screen may need to be verified by Google. Without verification, your users will see an additional page indicating that your app is not verified by Google.

← → ↺

https://console.developers.google.com/apis/credentials/oauthclient?project=rentalpoint-221117

Google APIs

RentalPoint

←

Create OAuth client ID

For applications that use the OAuth 2.0 protocol to call Google APIs, you can use an OAuth 2.0 client ID to generate an access token. The token contains a unique identifier. See [Setting up OAuth 2.0](#) for more information.

Application type

- ☐ Web application
- ☐ Android [Learn more](#)
- ☐ Chrome App [Learn more](#)
- ☐ iOS [Learn more](#)
- ☒ Other

Name ?

RentalPoint Docs

Leave as is or change name

Create

Cancel



You will need your Client ID and Client Secret for RentalPoint Setup so click edit to copy paste these values

← → ↺

https://console.developers.google.com/apis/credentials?project=rentalpoint-221117

Google APIs

RentalPoint

APIs & Services

Dashboard

Library

Credentials

Credentials

OAuth consent screen

Domain verification

Create credentials

Delete

Create credentials to access your enabled APIs. Refer to the API documentation for details.

OAuth 2.0 client IDs

Name	Creation date	Type	Client ID
RentalPoint Docs	Oct 31, 2018	Other	498024567459-n4b5ckv2op4q07simdta32mmavgh3it.apps.googleusercontent.com

Edit

Delete



Google APIs

RentalPoint

←

Client ID for Other

↓ DOWNLOAD JSON

↺ RESET SECRET

🗑 DELETE

Client ID	498024567459-n4b5ckr2op4q07isim6ta32mmsvgfq3t.apps.googleusercontent.com
Client secret	m3kjfTRIU5lj2ybSCZpupVjl
Creation date	Oct 31, 2018, 1:44:56 PM

Name ?

RentalPoint Docs

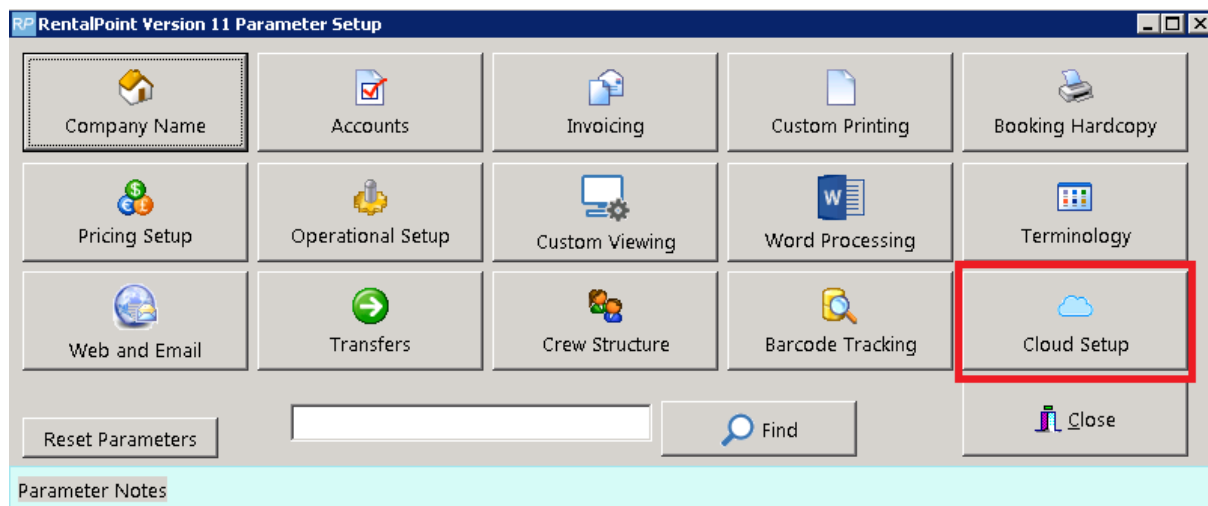
Save

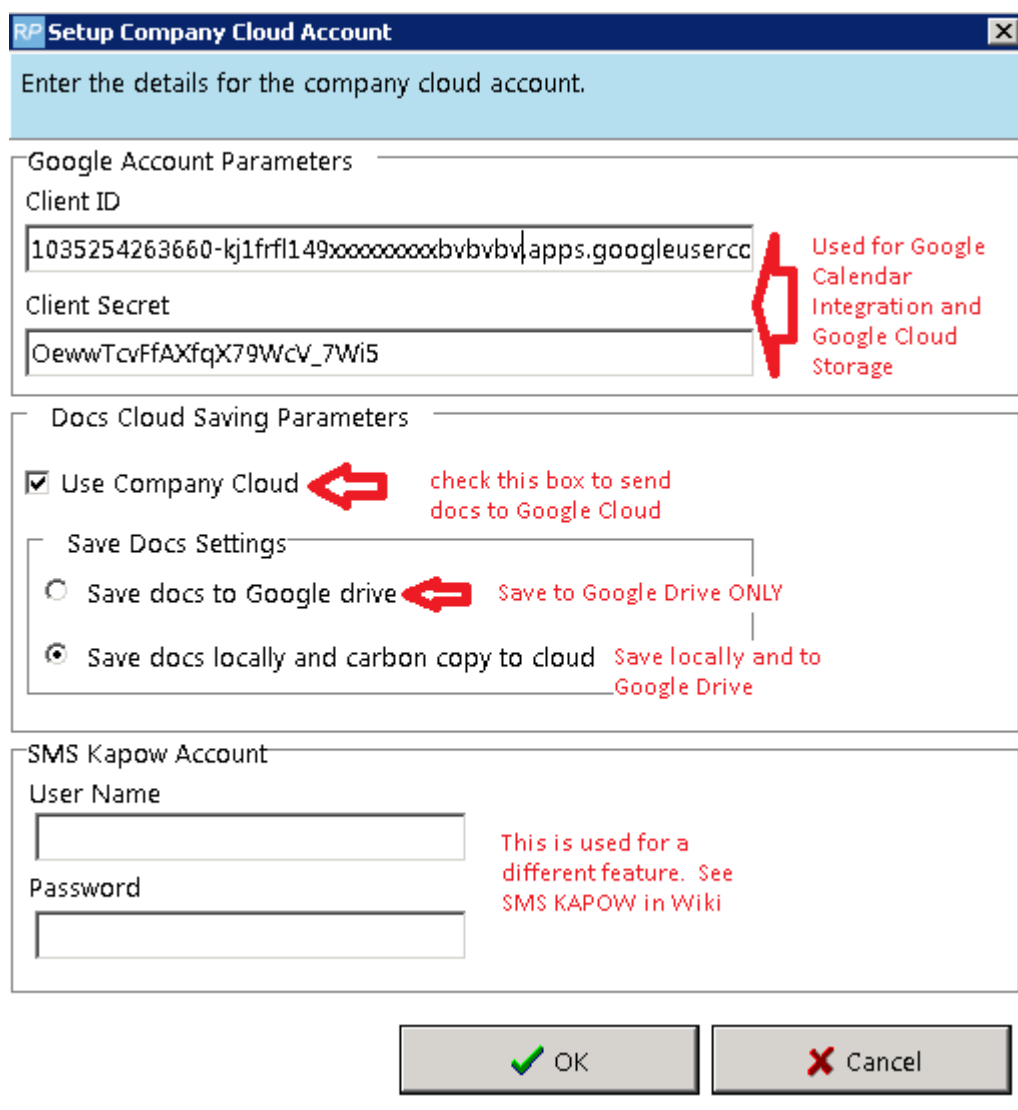
Cancel

 You will now need to set up Rentalpoint to interface with Google Docs; Once complete, you can share the folder with other users

Setting Up RentalPoint To Interface With Google Docs

From the Main Menu, Go To Setup -> Parameters -> Cloud Setup





RP Setup Company Cloud Account

Enter the details for the company cloud account.

Google Account Parameters

Client ID
1035254263660-kj1frfl149xxxxxxxxbvbvbjapps.googleusercontent.com

Client Secret
OewwTcvFfAXfqX79WcV_7Wi5

Docs Cloud Saving Parameters

☒ Use Company Cloud check this box to send docs to Google Cloud

Save Docs Settings

☒ Save docs to Google drive Save to Google Drive ONLY

☐ Save docs locally and carbon copy to cloud Save locally and to Google Drive

SMS Kapow Account

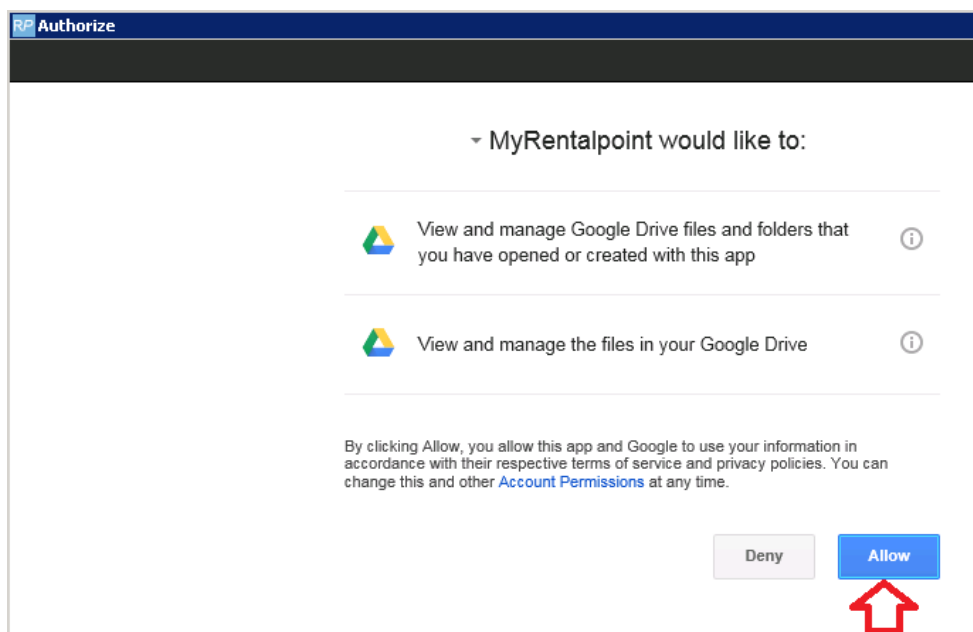
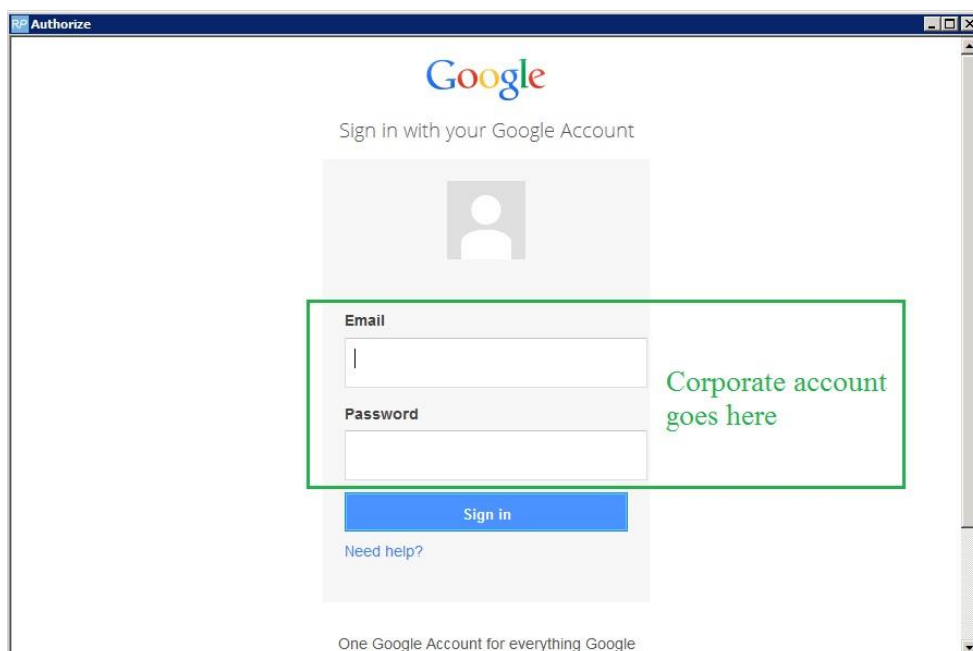
User Name

Password

This is used for a different feature. See SMS KAPOW in Wiki

OK Cancel

Authorization window will be opened once you hit ok above. Enter your CORPORATE email address and password. This only needs to be setup once unless the password is changed.



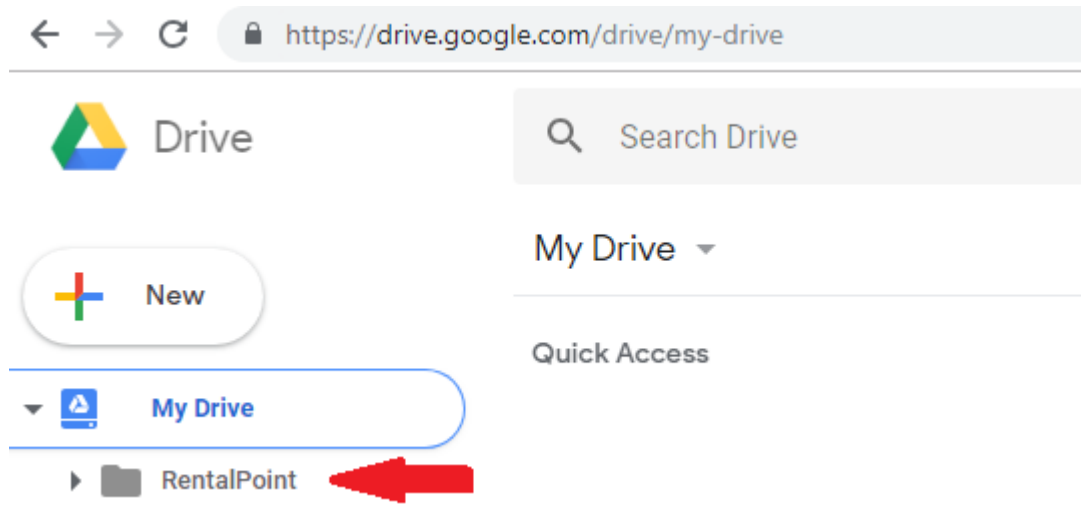
Accessing your documents online

Once all your parameters are set up, log out of Rentalpoint and back in again to avail of the changes. Then produce a quote for a booking; The quote should be saved in your Google Cloud Storage account <https://drive.google.com/drive/my-drive>

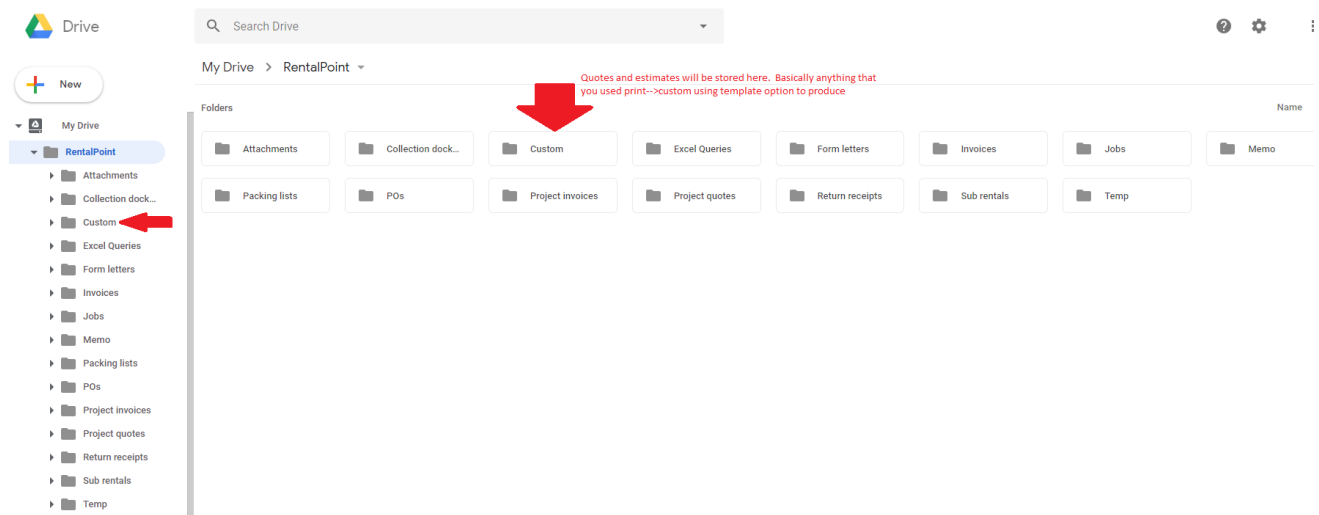


RentalPoint Google Drive Integration

Then expand the RentalPoint folder.

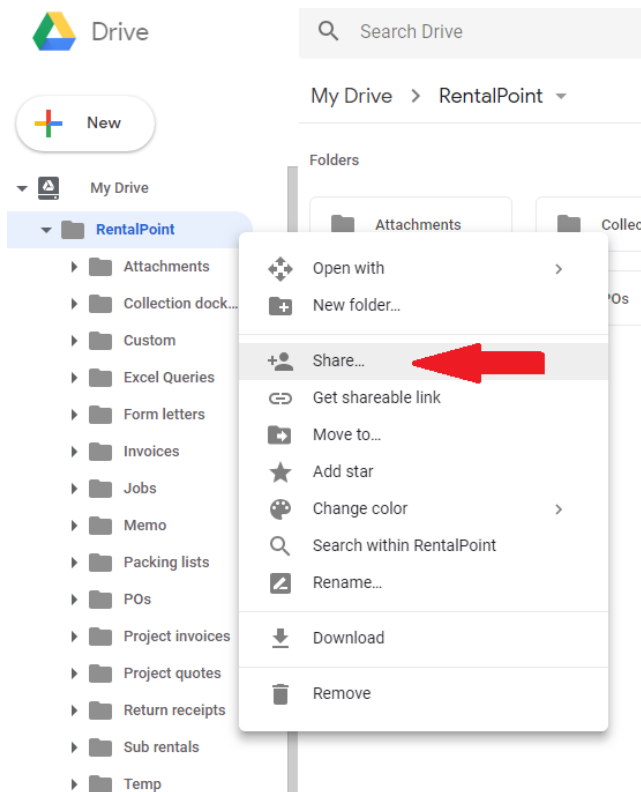


There will be folders for each type of document, estimates and quotes are kept in a folder called "Custom".



Sharing Your Rentalpoint Google Docs Folder


1. You should SHARE the "RentalPoint" folder with other users who need to have access to your CORPORATE folder on Google Drive, this should be every RentalPoint user in your company.



2.


1. Google drive share settings: Right click on a folder – Share (see screenshot above)
2. All authorized users may upload documents to your CORPORATE Google Drive. All files will show 'last edited by %username%' for traceability.

Share with others

Get shareable link 

People

myfriend@theiremailaddress.com

Can edit 

Add a note

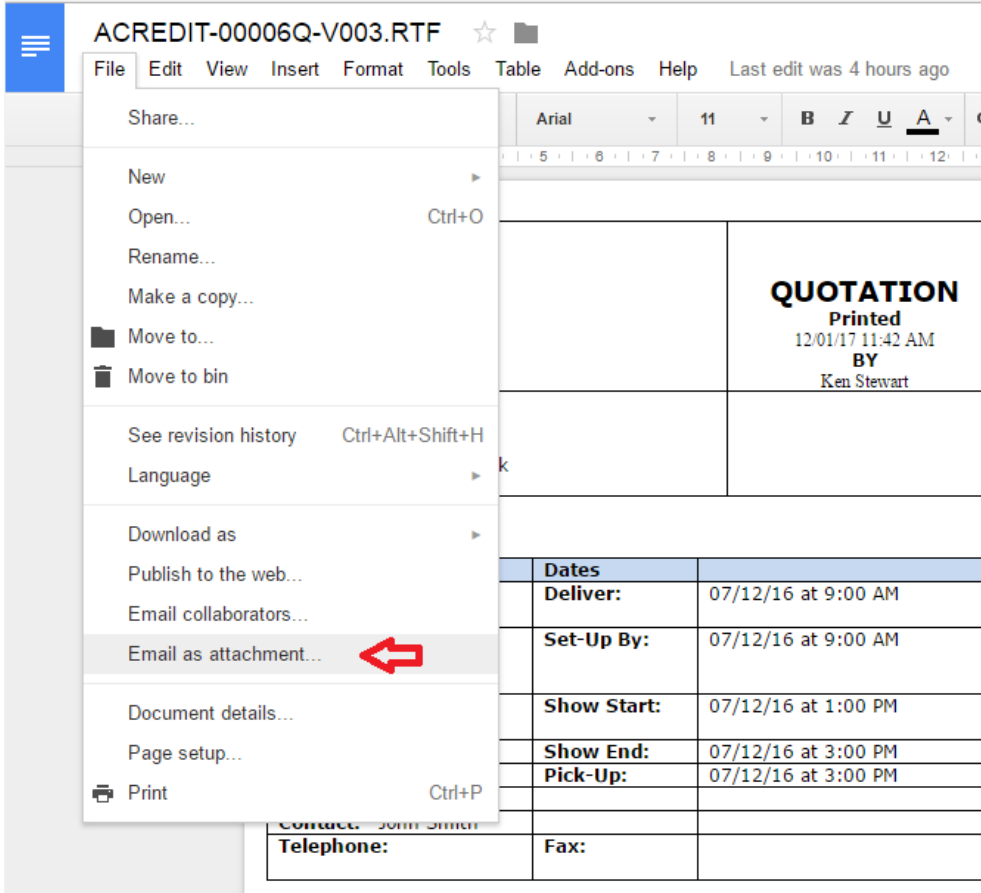
Send

Cancel

Advanced

Emailing Google documents as attachments

You can also send documents as PDF attachments, instead of using the share option, click the file menu and select “Email as attachment”, then enter/paste in the email address and send -



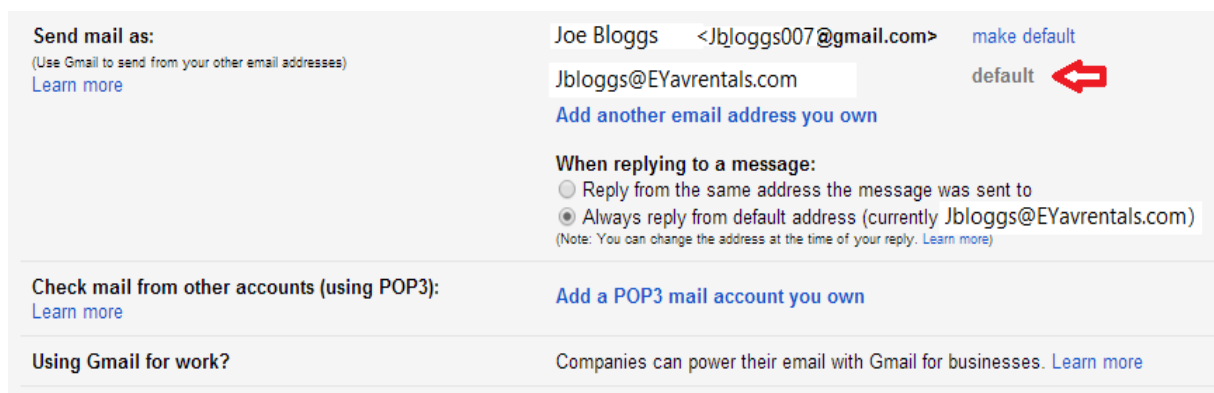
The screenshot shows a Google Docs document titled "ACREDIT-00006Q-V003.RTF". The "File" menu is open, and the option "Email as attachment..." is highlighted with a red arrow. The document content includes a "QUOTATION" section with the following details:

QUOTATION	
Printed 12/01/17 11:42 AM BY Ken Stewart	
Dates	
Deliver:	07/12/16 at 9:00 AM
Set-Up By:	07/12/16 at 9:00 AM
Show Start:	07/12/16 at 1:00 PM
Show End:	07/12/16 at 3:00 PM
Pick-Up:	07/12/16 at 3:00 PM
Contact: John Smith	
Telephone:	Fax:

Working with Google Docs Integration

Every RentalPoint user in your company should have or create their own Google account, they will use their own accounts to share documents with recipients, send and receive emails.

Please be aware that Google email allows you to send emails using your corporate email address as the send address, please see the snippet below from the Google mail setup window. It is advisable to set all Gmail accounts to use the corporate email return address if users are going to send emails using Gmail. In the settings below it is also possible to set Gmail to work with a pop3 account.



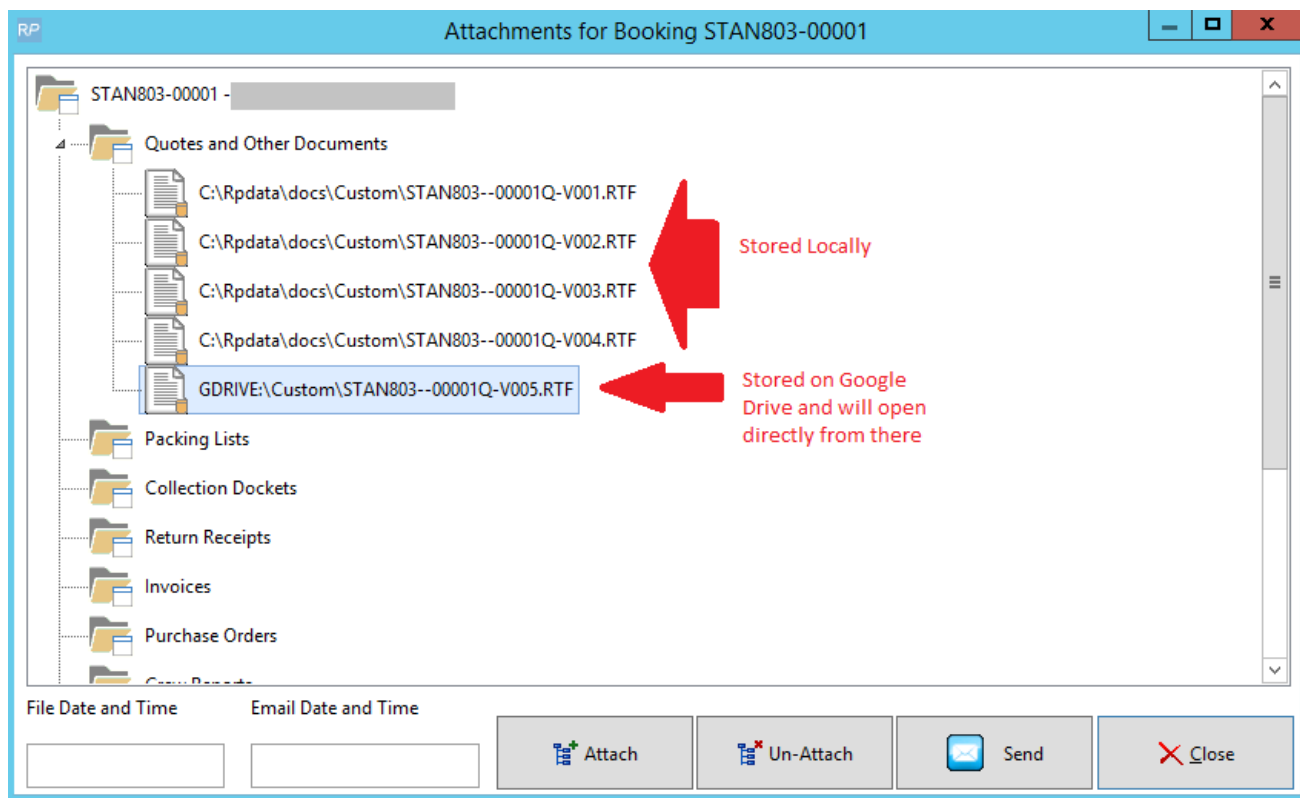
The screenshot shows the Gmail settings interface. Under 'Send mail as:', there are two email addresses listed: 'Joe Bloggs <Jbloggs007@gmail.com>' with a 'make default' link, and 'Jbloggs@EYavrentals.com' which is the 'default' address, indicated by a red arrow. There is a link to 'Add another email address you own'. Under 'When replying to a message:', there are two radio button options: 'Reply from the same address the message was sent to' and 'Always reply from default address (currently Jbloggs@EYavrentals.com)', which is selected. A note below states: '(Note: You can change the address at the time of your reply. Learn more)'. At the bottom, there are sections for 'Check mail from other accounts (using POP3):' with a 'Learn more' link, and 'Using Gmail for work?' with a link to 'Companies can power their email with Gmail for businesses. Learn more'.

Modifying Documents

- Option 1:
 - a. Set your parameters to 'Save Docs to Google Drive' only
 - b. All documents will be produced to Google Drive and opened there
 - c. All modifications will be made on Google Drive.
- Option 2
 - a. Set your parameters to 'Save docs locally and carbon copy to cloud'
 - b. All documents will be produced locally and a copy will be saved to Google Drive
 - c. When modifying, you would modify the document locally, then save and attach it to the booking. Once attached to the booking, it will be sync'd to the same folder on Google Drive

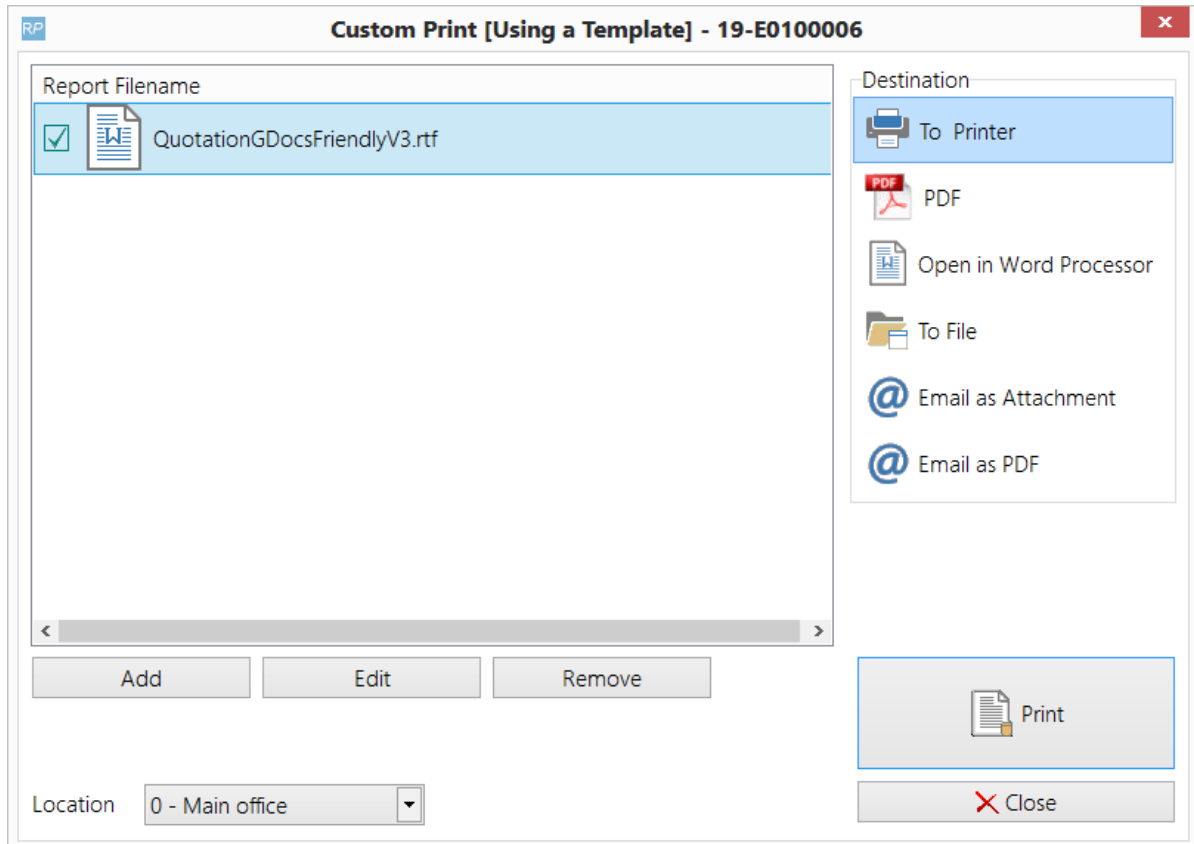
Attachments

Documents stored exclusively on Google Drive can still be opened from attachments tab in RentalPoint.



- Using Attach Option – any document can be attached to the Booking and after opening will automatically be synchronized with the relevant folder on Google Drive.
- Un-attach – any document can be un-attached from booking. All files are still on Google Drive and in local storage. They must be deleted manually.
- If you are working only with MS Office (i.e. Cloud settings from section 2 above are NOT set up) then your document will be stored locally only with a local link to the file.
 - Eg. C:\RentalPointV11\docs\Invoices\ALPH47-00002I-V001.PDF
- If you are working only with Google Drive (using 'Save all docs to Google Drive' setting in Cloud Parameters) then all Word files will be stored ONLY on Google Drive, PDF files will still have local copy). You will see a global link in the attachments window:
 - Eg. GDRIVE:\Invoices\ALPH47-00002I-V001
- If you are working with Google Drive and MS Office (using 'Save locally and Carbon copy to cloud' setting in Cloud Parameters then all documents will be opened locally). You will see a local link to the file in the attachments folder
 - Eg. C:\RentalPointV11\docs\Invoices\ALPH47-00002I-V001.PDF

Print Using Custom Template



Custom Print [Using a Template] - 19-E0100006

Report Filename

- ☒ QuotationGDocsFriendlyV3.rtf

Add Edit Remove

Location: 0 - Main office

Destination:

- ☒ To Printer
- ☐ PDF
- ☐ Open in Word Processor
- ☐ To File
- ☐ Email as Attachment
- ☐ Email as PDF

Print Close

Button description:

- Printer – Send to printer
- PDF – Create file. Store local, store local and on Google Drive. It depends on *selected settings
- Open in Word Processor – File will be opened from Word or from Google Drive. Depends on *selected settings.
- To File – Create local copy, create local and on Google Drive or create on Google drive only. Depends on *selected settings.
- Email as attachment – Send copy via Email
- Email as PDF – Send copy via Email in PDF format

*Selected setting:

- PDF files are always stored locally despite our cloud settings but they still could be opened via google drive.
- Cloud is not in use – Create file. Store it local. Open it local with MS Office
- Save all docs to google drive – Create file. Store it only on Google Drive. Open it from Google Drive
- Save locally and Carbon copy to cloud – Create file. Store it local and CC to cloud. Open it local with MS Office



RentalPoint Google Drive Integration

Sample PDF View on Google Drive

1ACME-00003Q-V003.PDF x

https://docs.google.com/file/d/0B7cxgKp6TJS2OGxFAQkfzjV2TjA/edit

1ACME-00003Q-V003.PDF ☆ ■

File Edit View Help

Comments Share

Anton Jakimenko

1

Printed 6/25/2014 2:08:00 PM
For Your Company Name Here

Booking Hardcopy

Page No. 1
Booking No. 1ACME00003

Location : Invoice No. : 2325 Extended From :

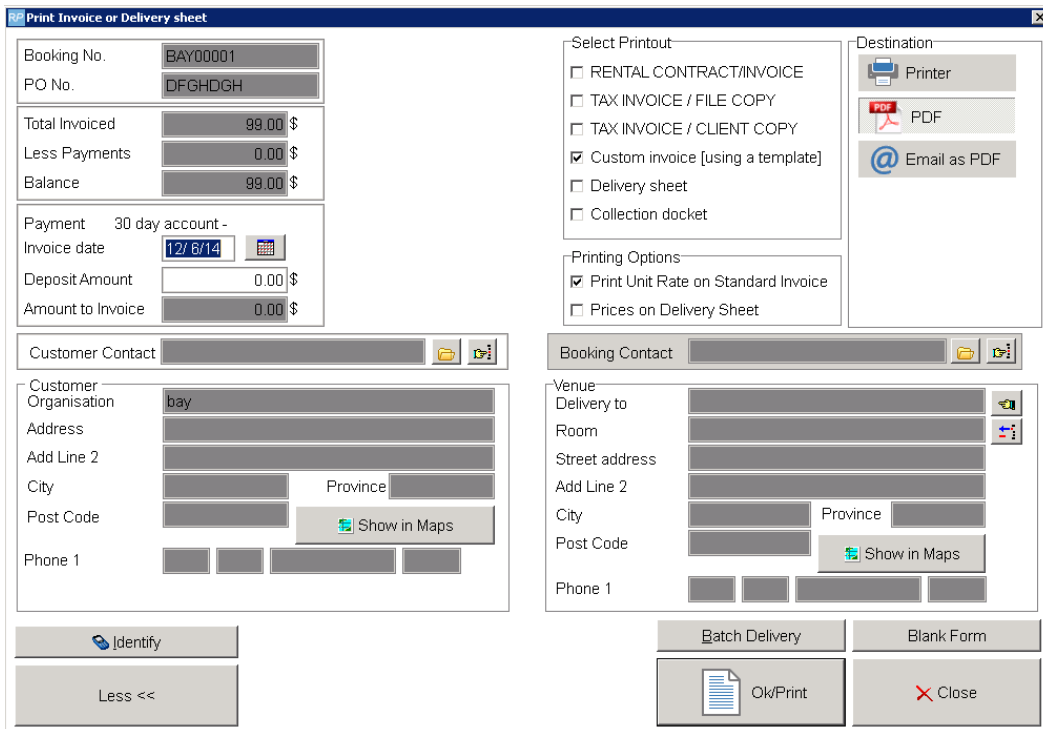
Delivery To:
Room:
Phone 1 : x
Phone 2 : x
Fax :
Contact :
Contact Phone :

Invoice To:The Acme Inc
123 Smith Street
Smitville, WA 6545
Phone 1 : 08 8888 8888 x
Phone 2 : x
Fax : 08 8888 9999
Contact : Road Runner

Order No. 1ACME00003	WH Out Date/Day/Time 19/01/09 Mon 0900	Via Customer Prep	Days Using 0	ProjectCode PROG
Booking Taken By demo	WH In Date/Day/Time 31/12/79 Sun 1800	Via We Collect De-prep	Payment Cash on delivery	Project Name The Programmer's Show
Booking Contact Bugs Bunny	Customer Contact Road Runner	Delivery	Setup	Rehearsal
Show Name	Show Starts	Show Ends	Strike	Pickup

Code	Description of Goods Ordered	Qty	Price	Ready	Loaded	Return	Short
Audio Equipment							
AHB186	AHB 186 18 into 6 foldback	1	480.00	a			
6amp spare fuse wire required, most units have minor faults and blow fuses regularly, use with caution. #2 serviced on 15/3/98.							
16-4-2	16-4-2 mixer (or system 8)	1	480.00	a			
8CHS	8 Channel Soundcraft 200 mixer	1	480.00	a			
CAS35	Cassette desc, stereo	1	240.00	a			
TAS1131B	Tascam 1131B three track AV deck	1	420.00	a			
T-A-344	Teac A-3440s 4 track reel-reel	1	540.00	a			
CAS3M	Cassette deck - mono, portable	1	180.00	a			
TD20	Tandberg TD20 2 track 15ips	1	300.00	a			
F250	Fostex 250 4 track portastudio	1	480.00	a			
R-555	ROLAND 555 CHORUS ECHO	1	300.00	a			
Lighting Equipment							
MOTOR	Motor for mirror ball	1	N/C	a			
UVBOX4	U.V. Fluoro 4'	1	60.00	a			
CHASE	Chaser audio activated 4 way	1	180.00	a			
STROBE	Strobe - twin tube	1	120.00	a			
BEACON	Beacon, blue/red/green/amber	1	72.00	a			
SOLAR	Solar 250 projector with effect	1	203.88	a			
SNAKE-L	SnakeLight 10m, and flowbox.	1	180.00	a			

Invoice or delivery sheet



Print Invoice or Delivery sheet

Booking No. BAY00001
PO No. DFGHDGH

Total Invoiced 99.00 \$
Less Payments 0.00 \$
Balance 99.00 \$

Payment 30 day account -
Invoice date 12/8/14
Deposit Amount 0.00 \$
Amount to Invoice 0.00 \$

Customer Contact
Customer Organisation bay
Address
Add Line 2
City Province
Post Code Show in Maps
Phone 1

Identify
Less <<

Select Printout
☐ RENTAL CONTRACT/INVOICE
☐ TAX INVOICE / FILE COPY
☐ TAX INVOICE / CLIENT COPY
☒ Custom invoice [using a template]
☐ Delivery sheet
☐ Collection docket

Printing Options
☒ Print Unit Rate on Standard Invoice
☐ Prices on Delivery Sheet

Destination
Printer
PDF
Email as PDF

Booking Contact
Venue
Delivery to
Room
Street address
Add Line 2
City Province
Post Code Show in Maps
Phone 1

Batch Delivery
Blank Form
Ok/Print
Close

Button description:

- Printer – Send to printer
- PDF – Create file. Store local, store local and on Google Drive. It depends on selected settings.
- Email as PDF – Send copy via Email in PDF format .



Templates for client facing documents

Before starting to use Google Docs instead of MS Office. Your old MS Word RTF templates need to be simplified to make them Google docs friendly, this mostly concerns the use of tables in MS Word RTF docs MS Word supports some features which Google Docs does not, for example; MS Word tables can have columns that "Span" more than one column.

We have adjusted our sample templates to make them Google Drive friendly, we have also given them a face lift to make them look nicer.

You can either -

1. Simplify and adjust your current templates to make them work with Google Docs or
2. Download our sample templates and paste your logo and contact details into these templates and use them.

Download the sample templates from [here](#)

Adjusting the templates is quite time consuming and requires above average MS Word experience, the average template takes anywhere from 30 minutes to 3 hours to adjust and test, depending on how complex they are.

If you would like us to adjust the templates for you to make them Google docs friendly, please email us (at support@rentp.com), the templates (via Google drive preferably), we will then look at them and estimate a fixed price quotation for the conversion. Get in early, first come first served. If you are on one of our cloud servers then there is no need to email us the templates.