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RentalPoint Racks

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1. Racks Defined

a. How are Racks different from Road Cases?

The main difference between the functionality of road case and rack within RentalPoint is that items packed into a rack are removed from stock temporarily, and no availability tracking is done on these items.

b. When should I use a Road Case?

Use a road case when you have a barcoded container that items can be scanned and placed into, prior to the road case being scanned and loaded onto the truck for shipping. Items can easily be removed from the road case to be rented as single items if need be.

c. When should I use a Rack?

Use a rack when you have individually barcoded items that will be bolted or physically attached together on a permanent/semi-permanent basis; these items cannot easily be detached and rented separately.

2. Components for Racks (Operational #102)

There are three options for determining how racks use components.

a. Racks Have Components : YES



This option is provided as a legacy to those companies that have racks already set up in this manner and wish to continue. New clients should not use this option

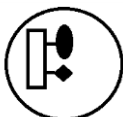
With this option all items that are part of a rack are first defined as components in F10 (product setup). After the items are configured as components of the rack, the items need to be scanned into the rack with the Pack a Rack utility.

This option affects the system in the following ways:

1. Components of racks are listed on a booking as 'In Rack'.
2. Items packed into the rack are removed from loose stock.
3. Items packed into the rack should match the component list in F10.

Initial Setup

1. All items that are part of the rack need to be created separately in F10.
2. Using drag n drop, add the items to the components folder of the rack.
3. Use the Pack a Rack window to scan the components into the rack. Packing an item in a rack removes the item from loose stock.
4. The list of components must match the list of assets packed into the rack, if there are more components than items packed in the rack then the line item will show a shortage in the equipment grid of the booking.



b. Racks Have Components : NO

With this option set to NO the component and accessory folders within a rack product are hidden. The parts are only defined by what is packed into the rack.

This option affects the system in the following ways:

1. The component and accessory folders are hidden from the product tree.
2. Only items packed in the rack are loaded into the booking equipment list.
3. All items packed into the rack are listed on a booking as 'In Rack'.
4. Items packed into the rack are removed from loose stock.

Initial Setup

1. All items that are part of the rack need to be created separately in F10.
2. Use the Pack a Rack window to scan the components into the rack. Packing an item in a rack removes the item from loose stock.
3. A rack must be packed before it's added to a booking.

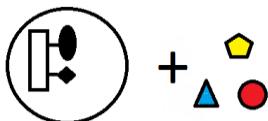


c. Racks Have Components : UNPACKED components and accessories

This option allows components or accessories to be defined that are NOT part of the PACKED rack but may be shipped with it.

This option affects the system in the following ways:





1. The component and accessory folders are visible in the product tree in Inventory Setup (F10). Components and accessories should be added ONLY if they are NOT getting packed into the rack
2. Items packed into the rack are removed from loose stock. The rack should be packed before adding it to a booking.
3. When the rack is added to a booking & subsequently checked out:
 - i. Components and Accessories are loaded on the booking with normal availability (not 'In Rack') following the packed items and are not removed from loose stock. These items must be scanned at checkout like any other non-rack item.
 - ii. All items packed into the rack are listed on a booking as 'In Rack'. Simply scan the rack barcode out at checkout.







3. Mobile Storerooms (Operational #103)

When Operational #103 is set to 'Mobile storerooms or Van' all items that are part of a rack display as short (in red) if the rack product is short.

Rack is not short, only the cable product displays in red because it hasn't been fully packed.

Code	Description	Quantity	Avail	Short	Use time
	Racks				
 RACK	Rack product	1	1	0	0
 CABLE	Cables	3	2	1	1
 LIGHT	light	2	2	0	0

Rack is short, all items in the rack display in red to indicate that they are all short.

Code	Description	Quantity	Avail	Short	Use time
	Racks				
 RACK	Rack product	1	0	1	1
 CABLE	Cables	3	2	1	0
 LIGHT	light	2	2	0	0

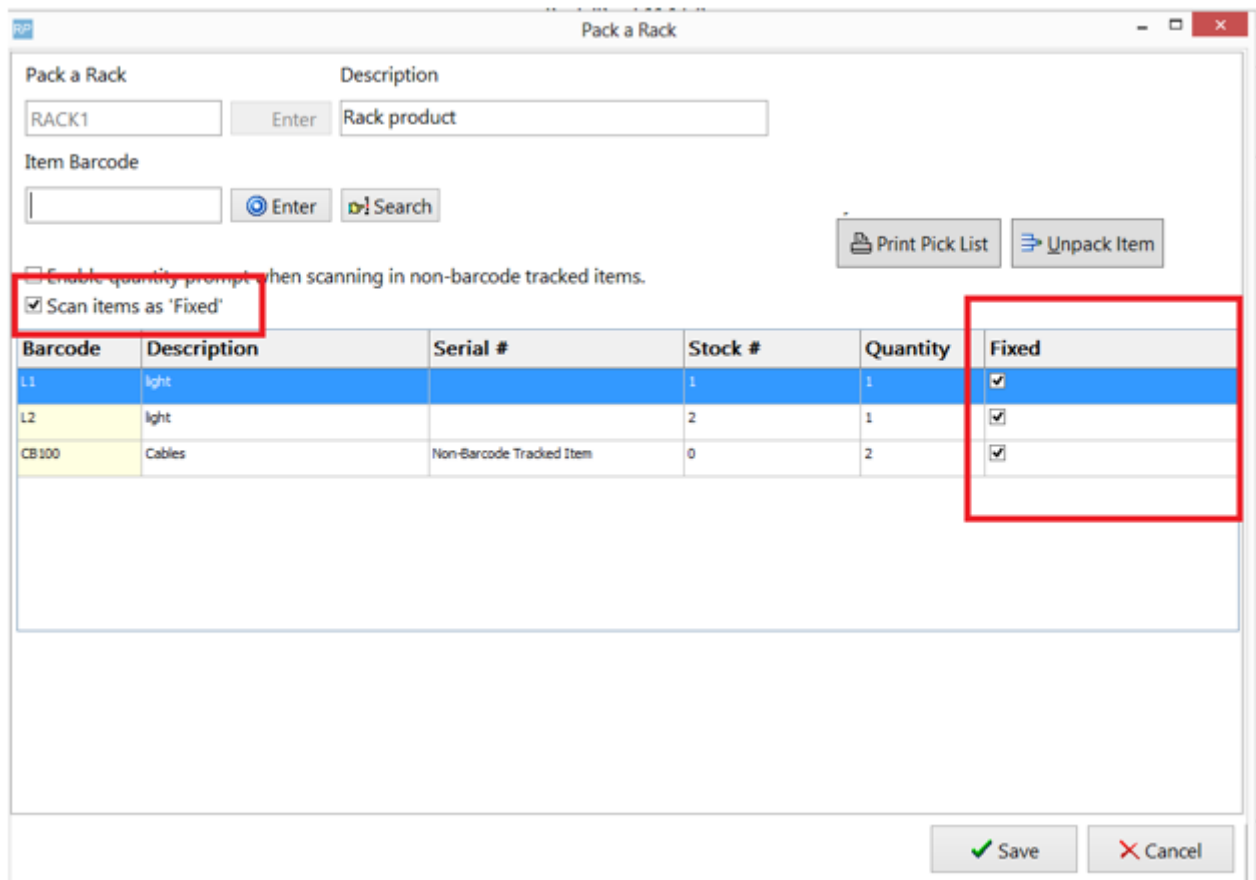
4. Floating vs. Fixed Rack Items

Rack items can now either be physically bolted to the rack (fixed) or sent along with the rack (floating).

1. Fixed items are automatically scanned in the checkout window and return window when the rack barcode is scanned, while floating items must be scanned in separately.
2. Floating items are still part of the rack, they are removed from loose stock and display as 'In Rack' in the booking.
 - a. Barcode Parameter #41 'Scan floating rack items on return only'
 - i. When set to NO Floating items must be scanned in the checkout and return window
 - ii. When set to YES floating items are automatically scanned out when the rack is scanned out, however all floating items must be scanned individually on return

Items are defined as floating in the pack window by unchecking the Fixed column.

The 'Scan items as 'Fixed'' option allows any new items scanned to default to either 'fixed' or 'floating'.



RP Pack a Rack

RACK1 Enter Rack product

Item Barcode

Enter Search

Print Pick List Unpack Item

Enable quantity prompt when scanning in non-barcode tracked items.

Scan items as 'Fixed'

Barcode	Description	Serial #	Stock #	Quantity	Fixed
L1	light		1	1	<input checked="" type="checkbox"/>
L2	light		2	1	<input checked="" type="checkbox"/>
CB100	Cables	Non-Barcode Tracked Item	0	2	<input checked="" type="checkbox"/>

Save Cancel

5. Setting up a Rack


a. An Important Note on Use of Rack Quantities

i. One Product and Asset Combination Per Unique Rack

Since all racks can be packed differently, each unique Rack Product MUST have ONE asset only in inventory setup. Each UNIQUE Rack Product would then be packed uniquely and used individually on the equipment grid of the booking.

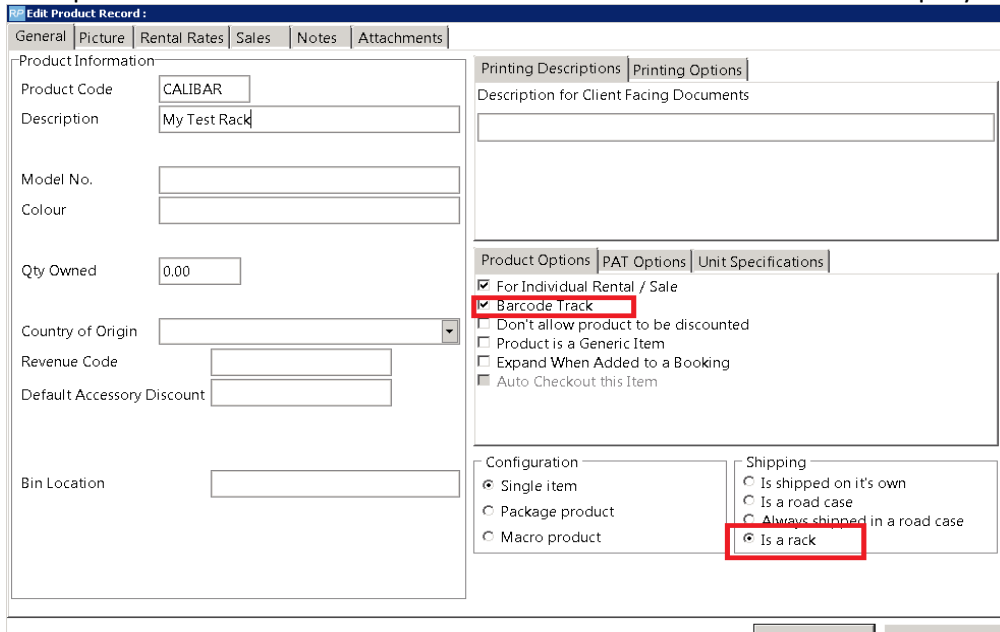
ii. One Product with Multiple Assets used only for IDENTICALLY Packed Racks

If there is a need for a Rack Quantity of greater than one (eg. 2 or more of the identical items are booked on a job where both are individually packed racks); Then all Racks packed for that product should be identical in content.

 Rack products with multiple assets can be located using the **Fix Invalid Racks** utility in F10; right click the tree → Utilities.

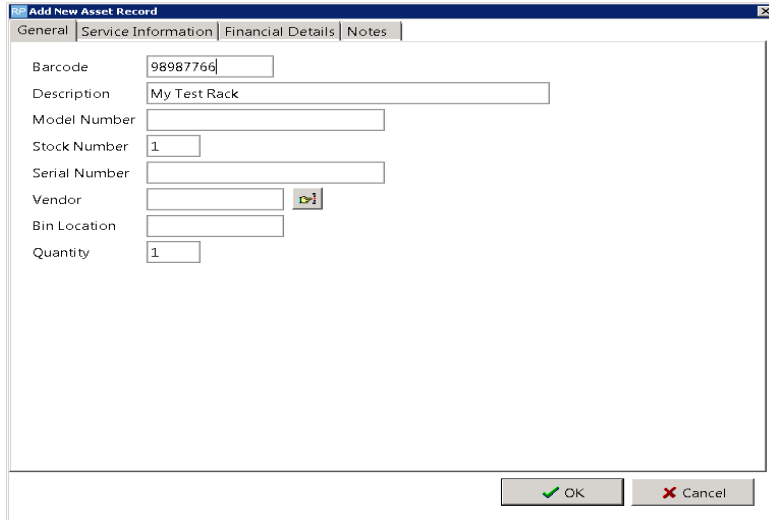
b. Create a Rack Product

The first step in setting up a rack is to create a product and set the Shipping configuration to 'Is a Rack'. The option to Track Asset Movements must also be enabled as racks are uniquely barcoded items.



c. Create The Rack Asset

Each rack is tracked using a unique barcode. You'll need to create an asset for the newly created rack product. To do this, expand the rack product in the tree, right click on the **Assets** folder and click **New**.

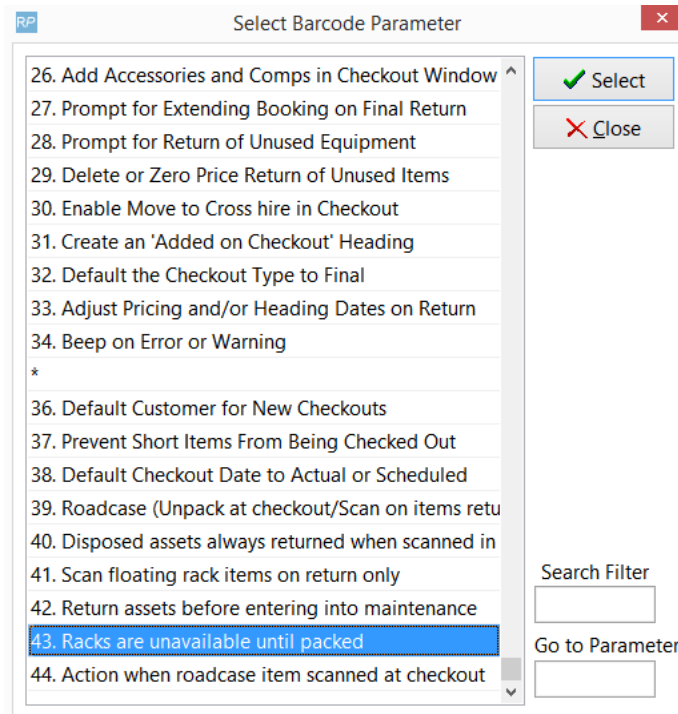


d. Determine the Products Included in the Rack

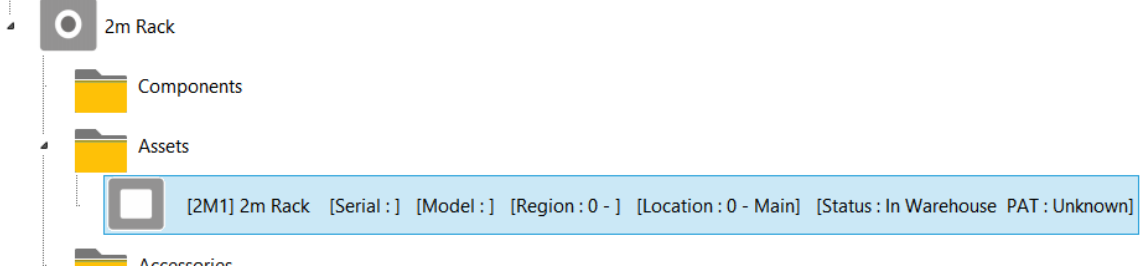
This will depend on your chosen setting for Operational parameter 103 and 102 explained in section 2 and 3 above.

e. Racks can be made unavailable for rental until they are packed

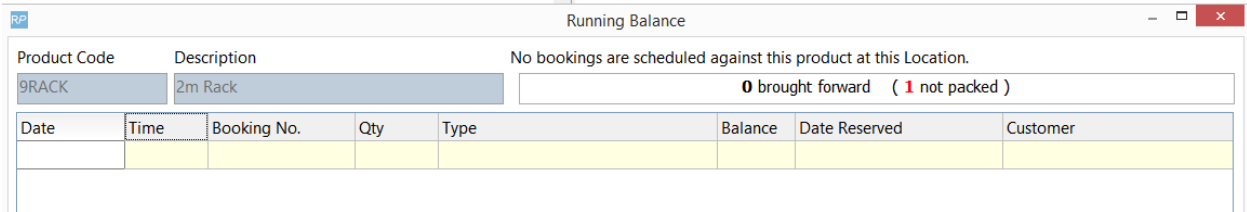
Enable barcode parameter #43 so that empty racks will not show as available for rental.



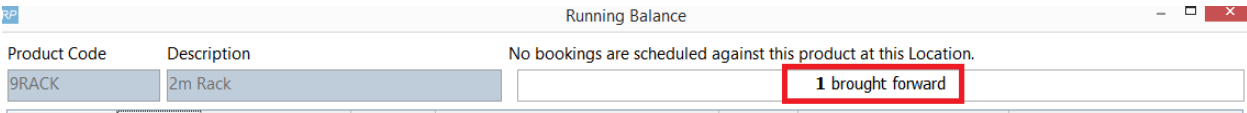
Here a new rack has been added, but is not yet packed



In the running balance, the initial stock shows as 0 with the total not packed displayed in red.



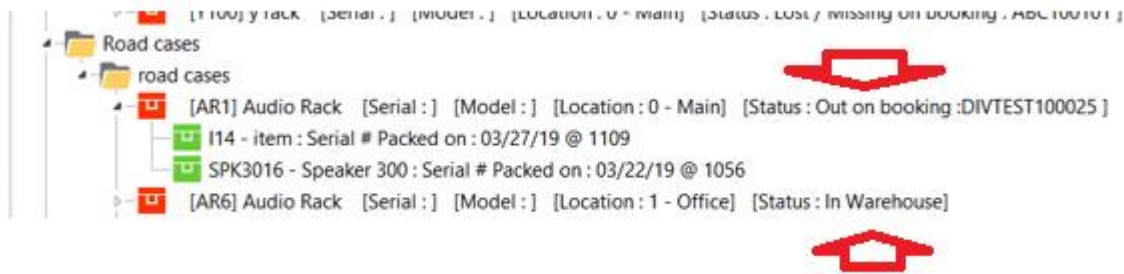
After packing some items into the rack the running balance now displays the rack as being in stock and available for rentals.



The rack will again be removed from available stock when it is unpacked.

f. Rack/Roadcase Asset Status Information

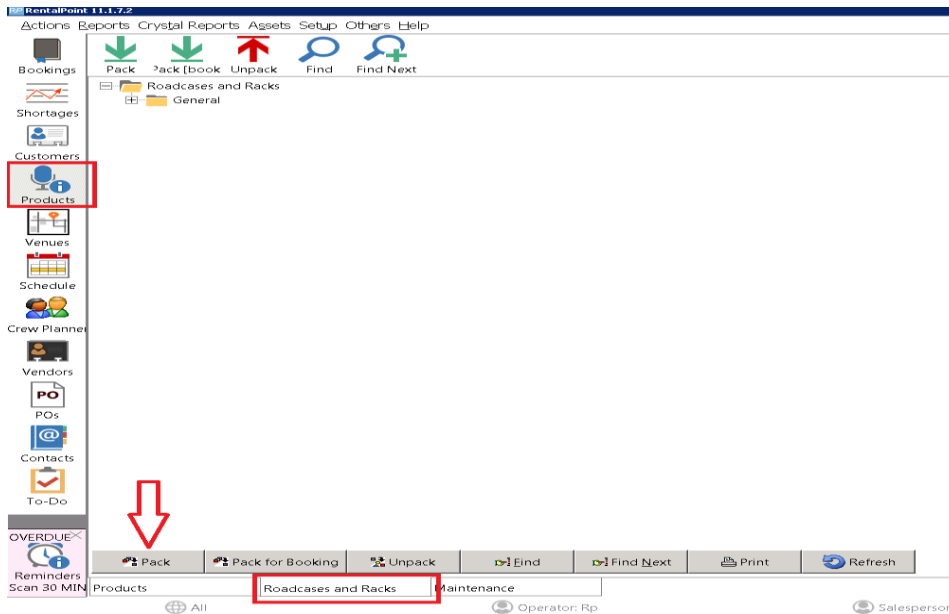
See Rack/Roadcase status in the inventory tree



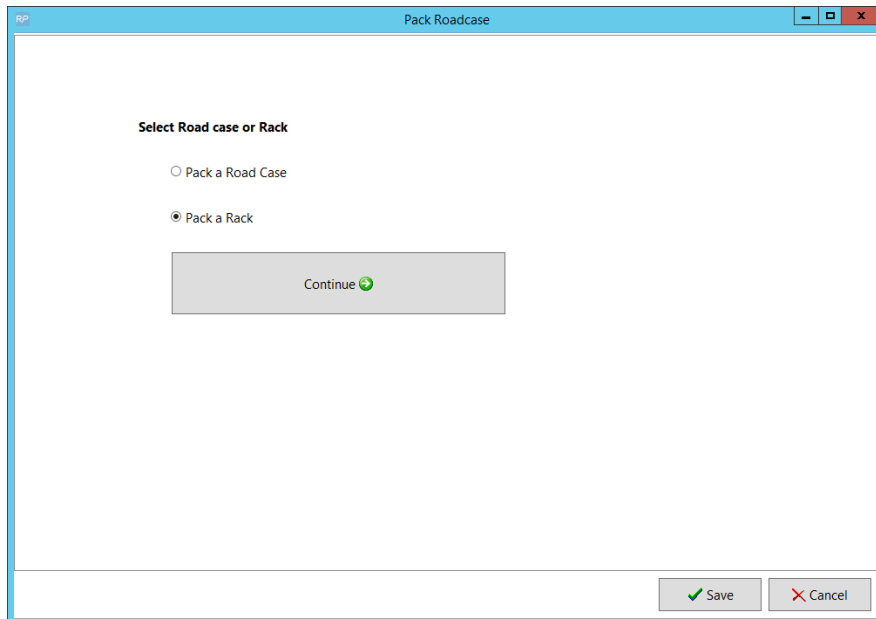
6. Packing a Rack

a. The Basics

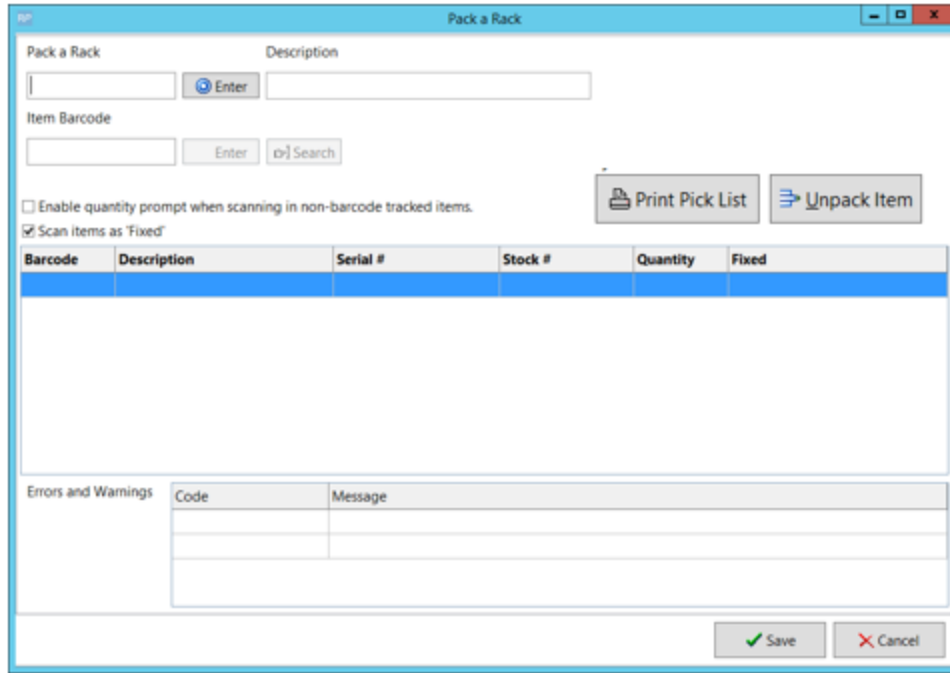
Navigate to the Products area and select the Road Cases and Racks Tab.



When the 'Pack' option is selected the user is asked to select whether they want to pack a road case or a rack.



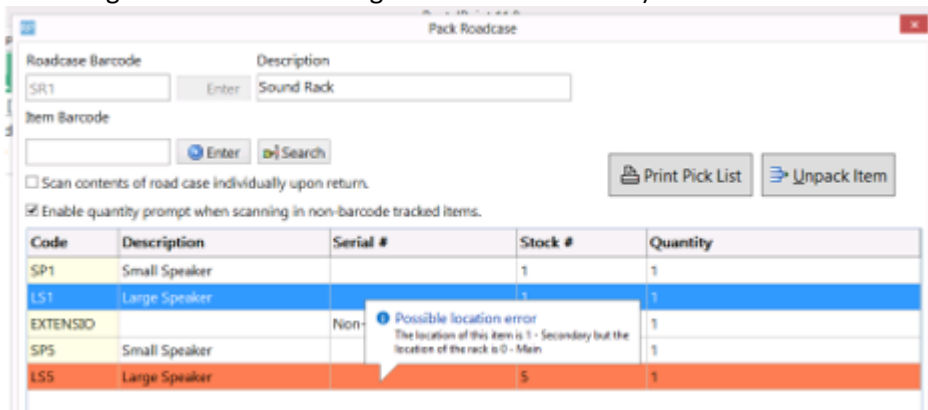
The user will then be prompted to enter a barcode for the roadcase or rack which MUST exist in inventory.



When you scan the barcode for each asset being packed into the rack, the item is removed from general stock and is not available to be rented separately even when sitting in the warehouse.

b. How does Multi-location affect packing the rack?

The asset location of the rack item is considered the home location of the rack. If you try to pack an asset that has a different home location, the asset will show up in RED in the pack window. Hovering over the line will display a location error, that your packing an asset that shouldn't be at the same location as the rack (perhaps the asset has the wrong location or the wrong barcode was entered).



When a non barcode tracked item is scanned, the items are taken from the stock of the rack assets location. So even if you have a different location scope selected, the items will assume the SAME location as the rack.

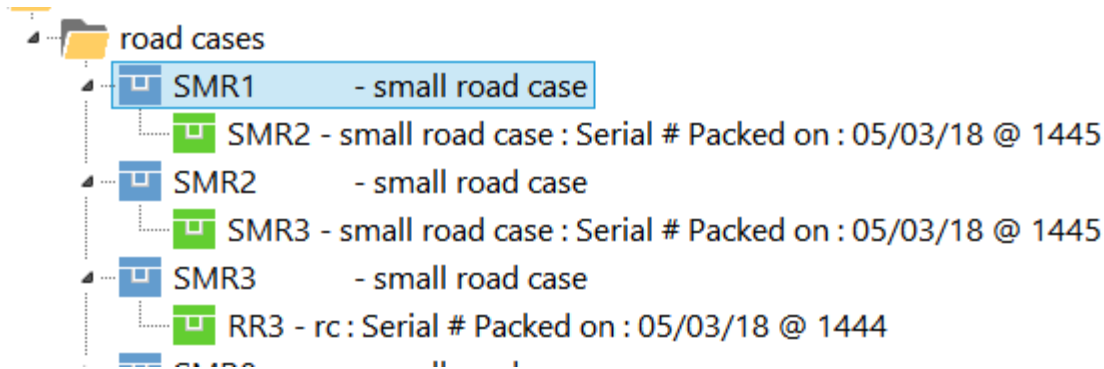
c. Packing a Rack into a Road Case


With Operational Parameter #207 'Allow nested road cases' enabled, road cases and racks can be packed into other road cases.

The steps for setup and packing include:

1. Create Road case product and road case asset. (see section 5)
2. Create Rack product and rack asset (see section 5)
3. Pack the Rack (see 6a above)
4. Pack the Rack into the road case using the RACK barcode (see 6a, choose road case option)

In the example below a road case RR3 is packed into the road case SMR3, this in turn is packed into SMR2 and that into SMR1.



 In checkout or return when the SMR1 barcode is scanned, any fixed items from SMR1, SMR2, SMR3 and RR3 will be loaded. While racks may be packed into a road case, they cannot be packed into other racks

d. Ability to override discrepancies when packing a Rack

When packing road cases or racks, some assets may have errors or warnings that should be resolved before being packed. Enabling the 'Ability to override discrepancies when packing a rack' operator privilege, will allow the user an option to resolve discrepancies during the packing process.

Access the operator privilege on the Products and PO's tab of the Operator Group or contact your system administrator for access.

up and Utilities Contact Management Access Other Crew
 res and Transfers Customers and Vendors Products and PO's

Assets

- Add / Edit Asset Records
- Can Change Asset Disposal Type to 'Stolen'
- Can Change Asset Disposal Type to 'Lost/Missing'
- Can Change Asset Disposal Type to 'Written Off'
- Can Set Assets to Active Status
- Financial details in Asset record
- Disposal details in Asset record
- Edit financial data before the stop date
- Delete Asset Records
- Move Assets Record in Product Setup
- Asset Listing

Racks

- Ability to override discrepancies when packing a rack

Purchase C

- Add Pur
- Edit Pur
- Delete I
- Post Pur
- Receive
- Archive
- Set the
- Change
- Duplica
- Delete I
- Can edi

Purchase C

- Can Ch

Errors and warnings that show up during the packing process will have an option to resolve on SAVE.

RP Pack a Rack - □ ×

Pack a Rack Description

IR1 Enter new rack

Item Barcode Number

Enter Search

Enable quantity prompt when scanning in non-barcode tracked items. Print Pick List Unpack Item

Scan items as 'Fixed'

Barcode Number	Description	Serial #	Stock #	Quantity	Fixed
TE7	tent		7	1	<input checked="" type="checkbox"/>
UU1	util test		1	1	<input checked="" type="checkbox"/>
L1	loss test		1	1	<input checked="" type="checkbox"/>
M4	MM33 Mixer		1	1	<input checked="" type="checkbox"/>
M5	MM33 Mixer		2	1	<input checked="" type="checkbox"/>
TTT	Top Deck Black Velvet Drape 4500 x 1		1	1	<input checked="" type="checkbox"/>
TD3	Rear Only Handrail - 6M x 3.6M Stage		3	1	<input checked="" type="checkbox"/>
TD1	Rear Only Handrail - 6M x 3.6M Stage		1	1	<input checked="" type="checkbox"/>
TD5	Rear Only Handrail - 6M x 3.6M Stage		5	1	<input checked="" type="checkbox"/>

Errors and Warnings

Code	Message
TD5	Wrong asset Location 3 - Country.
TD1	This asset has been lost.


Save Cancel

Any errors or warnings that can be resolved will be listed. Select the action to take in the 'Solution' column. When 'Fix' is selected the error will be resolved (for instance an asset in maintenance will be returned to service, or an asset listed as being at a different warehouse will be moved to the same warehouse as the rack/road case).

Resolve Rack Discrepancies

There are assets that were not packed in this rack. Please choose an action for each item in the solution column below.

Barcode Number	Description	Error Description	Solution
M5	MM33 Mixer	Asset needs test	Fix
TTT	Top Deck Black Velvet Drape 4500 x 10000	Out of Service	Fix
TD3	Rear Only Handrail - 6M x 3.6M Stage	Not in location	Fix
TD1	Rear Only Handrail - 6M x 3.6M Stage	Out on a booking Asset was disposed	Do nothing
TD5	Rear Only Handrail - 6M x 3.6M Stage	Not in location Out on a booking	Fix



7. How does a Road Case/Rack show on a booking?

Items packed into a road case or rack will display on the equipment tab of the booking

- For road cases, each item's availability is displayed separately
- For a rack, the availability of items displays as 'In Rack' since they are bolted to the rack. Rack functionality is further based on the setting of Operational parameter #102 as outlined in the next section.

a. Component/Accessory View in Pack Window

When Operational Parameter #102 is set to 'Unpacked components and accessories' the components and accessories display in the Pack a Rack window. This allows the user to see the entire list of items that go with the rack; both the items attached to it and the loose items sent along with it.

Users who have access rights to edit components and accessories are also able to add/edit/delete the components and accessories in this window.

Pack a Rack

Description: RACK1 Rack product

Item Barcode: [] Enter Search

Enable quantity prompt when scanning in non-barcode tracked items.
 Scan items as 'Fixed'

Print: Pick List | Unpack Item

Barcode	Description	Serial #	Stock #	Quantity	Fixed
L1	light		1	1	<input checked="" type="checkbox"/>
L2	light		2	1	<input checked="" type="checkbox"/>
GB100	Cables	Non-Barcode Tracked Item	0	2	<input checked="" type="checkbox"/>

Components: BULB - extra bulb x 1.000
Accessories

8. Maintenance for items in a Rack

Entering maintenance for an item within a rack won't affect the items availability. Unpack the item from the rack if you want to send it out for maintenance, or schedule maintenance on the rack item to indicate that the entire rack will be out of service for the time period.

9. Printing Racks

When printing custom templates, you can use the &EXRACKIC& insert field to stop racked items from printing.

Things to keep in mind:

- If you are already excluding parts on your template this field may not be necessary.
- Racked items will continue to print if the racked item is an accessory and the accessory has a price. This ensures that all values included in the total amounts are displayed.
- The consolidated booking hardcopy report does not include racked items to ensure that items that are already packed in a rack are not picked from loose stock.
- Operational #60, #61, #62 and #63 also determine if racked items display on printouts. These global overrides will override the product properties and any special insert fields.

10. Printing a Rack Picklist

A pick list for a road case or rack lists the items that were previously packed into it. To print the pick list for a road case or rack, either click the 'Pick List' button and enter the rack/roadcase barcode or select the barcode from the tree before clicking the button.

The screenshot shows the RentalPoint software interface. At the top, there is a navigation bar with links for 'Reports', 'Crystal Reports', 'Assets', 'Setup', 'Others', and 'Help'. Below this is a toolbar with several icons: 'Pack' (green arrow down), 'Pack [book]' (green arrow down), 'Unpack' (red arrow up), 'Find' (magnifying glass), 'Find Next' (magnifying glass with plus), 'Pick List' (printer icon, highlighted with a red box), 'Contents' (printer icon), and 'Refresh' (circular arrow). The main area displays a tree view of assets under 'Roadcases and Racks'. The tree includes folders for 'General', 'Road cases', and 'SOUND EQUIPMENT'. Under 'Road cases', there are sub-folders for 'road cases' and 'SOUND EQUIPMENT'. The 'road cases' folder contains items: RC1-AAA1 (- Road case), MOB1 (- mobile store), MOB2 (- mobile store), VV1 (- van1), and VV22 (- van 2). The 'SOUND EQUIPMENT' folder contains a sub-folder 'HEADPHOx' which contains 'RACK1 - rack'. Below 'RACK1', there are five items: L100 - Lighting, L2 - Lighting, L200 - Lighting, L3 - Lighting, and L4 - Lighting, each with a 'Serial # Packed on : 14/06/18 @ 1000'. At the bottom of the tree, there is a folder 'Packed for booking : ABC100021'. At the bottom of the interface, there is another toolbar with buttons for 'Pack', 'Pull', 'Unpack', 'Find', 'Find Next', 'Print contents', and 'Refresh'.

Pick List

Printed 18/06/18 @ 1600 Roadcase : RACK1 rack

Page :1

Code	Description	Serial No.	Stock#	Qty	Packed on	Packed by
L4	Lighting		12		14/06/18 @ 1000	JM
L3	Lighting		11		14/06/18 @ 1000	JM
L2	Lighting		10		14/06/18 @ 1000	JM
L100	Lighting		108		14/06/18 @ 1000	JM
L200	Lighting		208		14/06/18 @ 1000	JM

A pick list can also be printed for the road case/rack from the pack window.

Pack a Rack Description

RACK1 Enter rack

Item Barcode

Enter Search

Enable quantity prompt when scanning in non-barcode tracked items.

Scan items as 'Fixed'

Print Pick List Unpack Item

Barcode	Description	Serial #	Stock #	Quantity	Fixed
L4	Lighting		12	1	<input checked="" type="checkbox"/>
L3	Lighting		11	1	<input checked="" type="checkbox"/>
L100	Lighting		108	1	<input checked="" type="checkbox"/>
L200	Lighting		208	1	<input checked="" type="checkbox"/>

Updating the 'Pick List'

When you pack an empty road case/rack, a button will be displayed indicating that the pick list will be updated with the items packed (any barcodes packed for previous use of the roadcase will be removed from the current pick list). If more items are added later these will be added to the pick list as well.

Pack a Rack Description

RACK1 Enter rack

Item Barcode

Enter Search

Enable quantity prompt when scanning in non-barcode tracked items.

Scan items as 'Fixed'

Print Pick List Unpack Item

Barcode	Description	Serial #	Stock #	Quantity	Fixed

Errors and Warnings

Code	Message

Save and set as PickList Cancel

Print Contents

The 'Print contents' option will print only the items currently in the road case/rack.

Print Pack History

In the right-click menu there's an option to print the pack history, which will list all the items that had previously been packed as well as the pack date and the operator.

11. Swap out Damaged Rack Items

If an item in a rack or road case needs to be swapped with another due to fault or damage, use the **swap** option on the **Roadcases and Racks** tab. This option can be used even if the rack is checked out to a booking

1. Go to the Products Menu, Roadcases and Racks tab
2. Click **Swap** (or find the asset in the tree and then click the swap button)
3. The first prompt will ask for the item to be unpacked and replaced. If you've selected an asset in the tree the barcode will be filled in for you.

The screenshot shows the RentalPoint software interface. On the left is a navigation sidebar with icons for Products, Venues, Schedule, Crew Planner, Vendors, POs, Contacts, and To-Do. The main area displays a tree view of assets. A red arrow labeled '1.' points to the 'Products' menu icon. The tree view shows a folder 'PACKS - Roadcases and Racks' containing sub-folders for bookings. Under 'MYTEST0037', there is an asset 'AMP1101' with a red arrow labeled '2.' pointing to it. A dialog box titled 'Enter Value' is open, with the text 'Enter Barcode Number to remove from road case or rack' and the value 'AMP1101' entered in the input field, with a red arrow labeled '3.' pointing to it. The 'Swap' button in the bottom toolbar is highlighted.

The second prompt will ask for the replacement barcode of the asset to be added to the rack.

RP Enter Value
✕

Enter new Barcode Number to add to road case or rack

✔ OK

Warning
✕

AMP1101 is currently checked out on MYTEST00110 due back on 02/10/2019, It must be returned before it can be unpacked.

Proceed with return and unpack?

Yes
No



Barcoding parameter #42 'Return assets before entering into maintenance'

- TRUE - the asset will be returned before it is unpacked
- FALSE - the asset will not be returned, instead it will be flagged for automatic entry to maintenance when the asset is scanned in the return window (<http://RentalPoint.knowledgeowl.com/help/asset-maintenance#returns-direct-to-maintenance>)

Enter a maintenance record for the faulty asset when prompted

RP Maintenance Record
✕

Product Code **AMP-11**

Stock Number **1**

Entry Date **02-10-19**

Asset Status

Damaged

Faulty

Test Required

Out Of Service

Temporarily

Permanently

Out For Service Date / Time

Return From Service Date / Time

Unknown Return Date

Supplier Vendor

Reference Customer

Material Charge (per asset)

Labour Charge

Total

Faults

Dropped on site, no longer useable

Repair Details

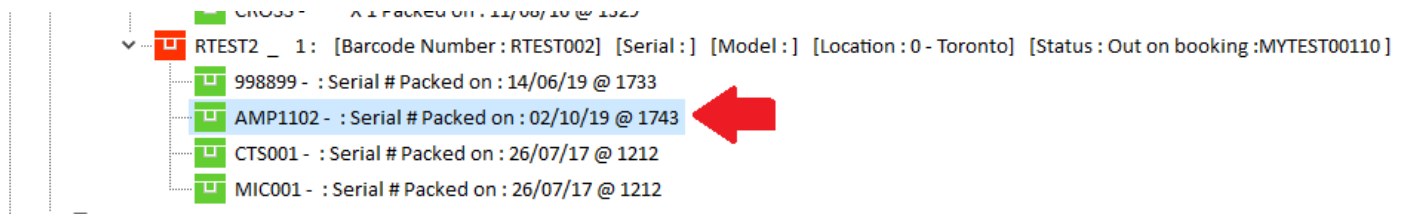
Needs new screen and wiring check

Include on Maintenance Report

Location

✔ Add
✕ Cancel

Note the asset swapped out in the packed rack



Exceptions

- If the original asset has a sold/disposed status it will be unpacked but not returned.
- If the new asset is sold/disposed the swap will not be allowed
- If both the original and new asset are out on the same booking the old asset will be returned (as needed) but the new asset will remain on the booking so it can be scanned in when the road case/rack is returned.
- If the asset needs to be returned before it can be unpacked (see barcoding #42) then the operator must have rights to return a booking in order to use the swap when the asset is currently out.