



Reminder for Overdue Items

The **Reminders For Overdue Items** window combines several reports into one window to easily maintain all of your overdue items. Each report is interactive and has several options such as opening a booking, viewing the audit trail and printing custom documents. This report is accessed via the **Reports** main menu. As an option, you can enable Operational Parameter #33 – Scan for Overdue Bookings to automatically display this window if there are overdue unconfirmed bookings.

RP Reminders For Overdue Items
— □ ×

Overdue For Invoicing		Overdue For Project Invoicing		Bookings To Be Re-Invoiced		
Overdue Unconfirmed Bookings			Overdue For Checkout		Overdue For Return	
Booking Number	Company	Showname /	Confirmation By	Warehouse Out	Progress	Salesp ^
MYNEWCUS00002	my new customer		02/29/16	02/29/16	Light	
AIRPUSH00014	AIRPUSH, INC.		03/02/16	03/03/16	Light	King C
MCUST00001	myname		06/13/16	06/13/16	Light	
NCUST00001	ncust		06/13/16	06/13/16	Light	
MYTEST00036	MYTEST		07/28/16	07/28/17	Heavy	RP
THISCUST00002	thiscust		09/12/16	09/12/16	Light	
BRIST00024	BRISTOL-MYERS SQUIBB		11/01/16	11/08/16	Heavy	RP
BRIST00025	BRISTOL-MYERS SQUIBB	Gibson Wedding	11/09/16	11/08/16	Heavy	King C

Open
Quick Look
Pick List
Confirm Booking
Cancel

15 record(s) displayed.
Refresh

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
- Reserved Asset Conflicts
- Target Margins
- Orphaned Cross rentals

Region / Location Scope

All

Region

0 - ONE ▼

Location

0 - Toronto ▼

Operator Scope

All Operators

Operator

RP ⋮

Salesperson Scope

All

Salesperson

⋮

Booking Type

- Rental
- Sale
- Cycle billed 7
- Cycle billed 14
- Cycle billed 28
- Cycle billed Monthly
- Cycle billed Quarterly

Reset Timer
Print
Close



Reminder for Overdue Items

Operator Privileges

Each report is controlled via an operator privilege. To set the operator privileges go to Setup → Operators and double click to open a group. If the privileges in the following screenshot are enabled, users can access the report in the reminder window.

RP Edit Group Record : ADMINISTRATOR ×

Group Name	Bookings	Cross rentals and Transfers	Customers and Vendors	Products and PO's	Checkout, Return and Maintenance
Reports	Printing Options	Setup and Utilities	Contact Management Access	Other	Crew and Activities
Booking Scope					

Customer Reports	Booking Reports	Others
<input checked="" type="checkbox"/> Cash Receipts	<input checked="" type="checkbox"/> Revenue Report	<input checked="" type="checkbox"/> P.O. Approval Reports
<input checked="" type="checkbox"/> Invoice Register	<input checked="" type="checkbox"/> Booking Cross Section	
<input checked="" type="checkbox"/> Aged Analysis	<input checked="" type="checkbox"/> Booking Statistics	Crystal Reports
<input checked="" type="checkbox"/> Account Audit	<input checked="" type="checkbox"/> Price Override	<input checked="" type="checkbox"/> Add a Crystal Report
	<input checked="" type="checkbox"/> Audit Trail	<input checked="" type="checkbox"/> Delete a Crystal Report
Product Reports	<input checked="" type="checkbox"/> Losses and Breakages	<input checked="" type="checkbox"/> Run a Crystal Report
<input checked="" type="checkbox"/> Product History	<input checked="" type="checkbox"/> Profit Analysis report and margin grid	
<input checked="" type="checkbox"/> Recommended Re-order	<input checked="" type="checkbox"/> Cross rental Statistics Report	Crew Reports
<input checked="" type="checkbox"/> Maintenance Costs	<input checked="" type="checkbox"/> Discrepancy Reports	<input checked="" type="checkbox"/> Technician Listing
<input checked="" type="checkbox"/> Stocktake Discrepancy	<input checked="" type="checkbox"/> Tax Report	<input checked="" type="checkbox"/> Crew Assignment
<input checked="" type="checkbox"/> Maintenance by Supplier	<input checked="" type="checkbox"/> Open Return Audit Trail	<input checked="" type="checkbox"/> Crew Schedule
<input checked="" type="checkbox"/> Sales Analysis	<input checked="" type="checkbox"/> Late Returns	<input checked="" type="checkbox"/> Technician Show Sheet
<input checked="" type="checkbox"/> Due for Service	<input checked="" type="checkbox"/> Deleted Bookings	<input checked="" type="checkbox"/> Technician Timesheet
<input checked="" type="checkbox"/> Product Enquiry Statistics	<input checked="" type="checkbox"/> Cancelled Booking Reasons	<input checked="" type="checkbox"/> Expense Report
<input checked="" type="checkbox"/> Most Popular Products	<input checked="" type="checkbox"/> Overdue Unconfirmed Bookings	<input checked="" type="checkbox"/> Technician Schedule
<input checked="" type="checkbox"/> Top Subrented Products	<input checked="" type="checkbox"/> Overdue For Checkout	<input checked="" type="checkbox"/> Job Costing
<input checked="" type="checkbox"/> Return On Investment	<input checked="" type="checkbox"/> Overdue For Return	<input checked="" type="checkbox"/> Technician Utilization
<input checked="" type="checkbox"/> Room Schedule	<input checked="" type="checkbox"/> Overdue For Invoicing	<input checked="" type="checkbox"/> Labor Revenue
<input checked="" type="checkbox"/> Inventory Valuation Report	<input checked="" type="checkbox"/> Overdue For Project Invoicing	<input checked="" type="checkbox"/> Crew Task
<input checked="" type="checkbox"/> Utilization	<input checked="" type="checkbox"/> Cross Rental Review	
<input checked="" type="checkbox"/> Inventory General Reporting	<input checked="" type="checkbox"/> Cycle billed To Be Invoiced	
	<input checked="" type="checkbox"/> Bookings To Re-Invoice	
	<input checked="" type="checkbox"/> Venue Flow Sheet Report	

All Clear All All In Tab Clear All In Tab Find OK Cancel



Reminder for Overdue Items

Available Reports

Overdue Unconfirmed Bookings

Lists all bookings that have not been saved in Confirmed status by the specified Confirm Date in the Status tab of the booking. Users can double click to open the booking and set it to Confirmed status, or they can use the **Confirm Booking** button to update the status in one click. The report automatically refreshes and removes the confirmed booking.

Overdue for Checkout

Lists all bookings that are still in Booked status and have passed their scheduled Warehouse Out date. Users can double click the booking to go directly to the checkout window. Once the checkout is completed and the booking status is set to Out, the booking will be removed from the report.

Overdue for Return

Lists all bookings that are still in Out status and have passed their scheduled Warehouse In date. Users can double click the booking to go directly to the return window. Once the return is completed and the booking status is set to Returned, the booking will be removed from the report.

Overdue for Invoicing

Lists all bookings in confirmed status that have not been invoiced yet. Scope options allow you to narrow down the bookings you want to view. Users can double click a booking to go directly to the invoicing window.

Overdue for Project Invoicing

Lists all projects that have not been invoiced yet. Scope options allow you to narrow down the projects you want to view. Users can double click a project to go directly to the project invoicing window.

Bookings to be Re-invoiced

Lists all bookings that have been previously invoiced where the current total amount of the booking does not match the original invoiced amount. Users can double click the booking to access the invoicing window and re-invoice the booking.

Long Term to be Invoiced

Lists all long term bookings that need to be invoiced. Scope options allow you to narrow down the bookings you want to view (ie. 7 day, 14 day, monthly etc). Users can double click a booking to go directly to the invoicing window.

Overbooked Cross Rentals

A new Cross Rental Review tab has been added to the Reminder report (v11.1.5 and higher). This new tab will display all cross rentals that contain items that are overbooked. For example, say you book qty 10 on a booking. However you only have 7, so you're now short 3. You cross rent those 3 items. Another operator receives more stock into the warehouse. So your qty avail goes from 7 to 15, which means you have enough avail to cover your original booking. In this case the cross rental is not required. The report will display the cross rental and the item(s). Warehouse staff can routinely review this report to ensure that the company saves money by not overbooking cross rented equipment.

Orphaned Cross hires and Transfers

Lists items from sub rentals and transfers, that do not have a corresponding item in a booking. This can happen if equipment on a booking is modified after a cross rental or transfer has been created for that equipment, thus rendering the transfer or cross rental unnecessary. The 'List Orphaned Cross Rentals and Transfers' option allows orphaned items to be reviewed and removed as needed, so they aren't sub rented or transferred unnecessarily.



Reminder for Overdue Items

Scope

The scope area along the bottom of the window will change depending on the report you're viewing. Use the scope area to narrow down the results displayed in the grid.

The Display Preferences are unique to each user. Checking and unchecking the report boxes will display and hide the report tabs. Your preferences will be saved for the next time you open the reminder window.

Display Preferences <ul style="list-style-type: none"><input checked="" type="checkbox"/> Overdue Unconfirmed<input checked="" type="checkbox"/> Overdue for Checkout<input checked="" type="checkbox"/> Overdue For Re Bookings not delivered<input checked="" type="checkbox"/> Overdue For Invoicing<input checked="" type="checkbox"/> Overdue For Project Invoicing<input checked="" type="checkbox"/> Bookings To Be Re-Invoiced<input type="checkbox"/> Long Term To Be Invoiced<input type="checkbox"/> Reserved Asset Conflicts<input type="checkbox"/> Target Margins<input type="checkbox"/> Orphaned Cross rentals	Region / Location Scope <ul style="list-style-type: none"><input checked="" type="radio"/> All<input type="radio"/> Location Region: <input type="text" value="0 - ONE"/> Location: <input type="text" value="0 - Toronto"/>	Operator Scope <ul style="list-style-type: none"><input type="radio"/> All Operators<input checked="" type="radio"/> Operator <input type="text" value="RP"/>	Salesperson Scope <ul style="list-style-type: none"><input checked="" type="radio"/> All<input type="radio"/> Salesperson <input type="text"/>	Booking Type <ul style="list-style-type: none"><input checked="" type="checkbox"/> Rental<input checked="" type="checkbox"/> Sale<input type="checkbox"/> Cycle billed 7<input type="checkbox"/> Cycle billed 14<input type="checkbox"/> Cycle billed 28<input type="checkbox"/> Cycle billed Monthly<input type="checkbox"/> Cycle billed Quarterly
<input type="button" value="Reset Timer"/> <input type="button" value="Print"/> <input type="button" value="Close"/>				