



Setting up Labour Products and Technicians

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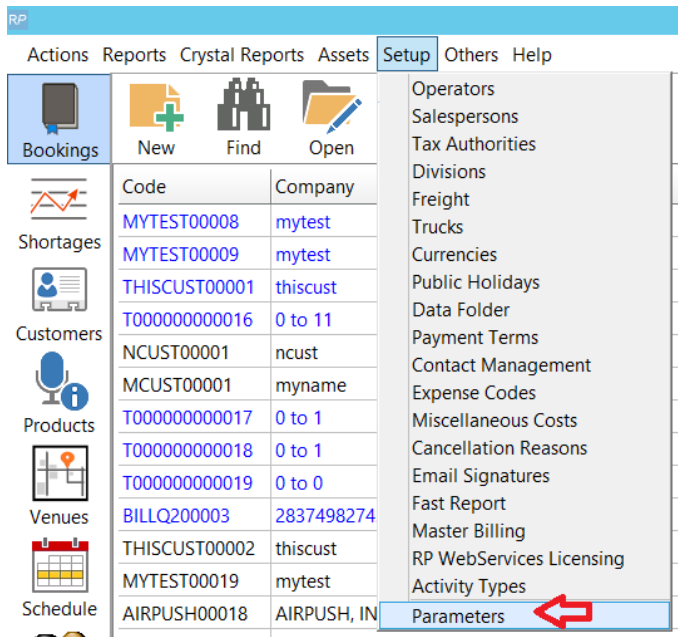
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Crew Parameters

Crew RATES and TASKS must be set up prior to adding crew to a booking. There are also some other crew parameters you may want to customize specifically for your company use.

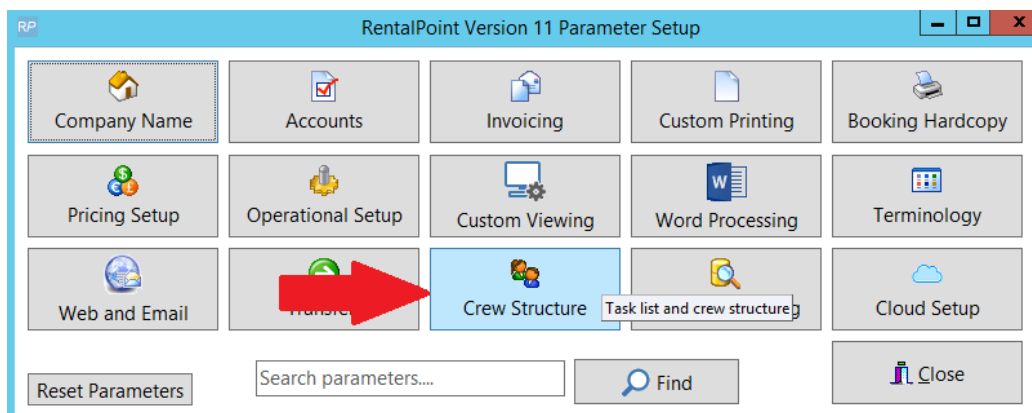
Setup Labour Rates

Goto Setup→Parameters→Crew Structure and open Crew Structure Parameter #1 – Rate Structure to define crew rates



The screenshot shows the 'Setup' menu in the RentalPoint software. The 'Parameters' option at the bottom of the menu is highlighted with a red arrow. The menu items are as follows:

- Operators
- Salespersons
- Tax Authorities
- Divisions
- Freight
- Trucks
- Currencies
- Public Holidays
- Data Folder
- Payment Terms
- Contact Management
- Expense Codes
- Miscellaneous Costs
- Cancellation Reasons
- Email Signatures
- Fast Report
- Master Billing
- RP WebServices Licensing
- Activity Types
- Parameters (highlighted with a red arrow)



The screenshot shows the 'RentalPoint Version 11 Parameter Setup' window. The 'Crew Structure' button is highlighted with a red arrow. The window contains the following buttons:

- Company Name
- Accounts
- Invoicing
- Custom Printing
- Booking Hardcopy
- Pricing Setup
- Operational Setup
- Custom Viewing
- Word Processing
- Terminology
- Web and Email
- Parameters (highlighted with a red arrow)
- Crew Structure (Task list and crew structure)
- Cloud Setup
- Reset Parameters
- Search parameters...
- Find
- Close

Rate structures can be entered as outlined below

- Fixed (daily) rate should be 'Y' if the description is for a daily rate and 'N' if the description is for an hourly rate
- The start/finish columns are used in combination with Crew Structure Parameter #16 – Strict Enforce of Crew Times.
 - If crew parameter #16 is disabled, you can ignore the start/finish columns
 - If crew parameter #16 is enabled, it means the system will force you to enter crew within the times specified in this parameter. For example, you enter crew on a booking and select 'Hourly Rate – Weekday'. The strict times for this rate are from 6am to 9pm. If you attempt to change the start time to 5am you will receive a notification and the time will be reset to 6am.

Rate structure			Start		Finish		
Rates	Description	Fixed (daily) rate	Hour	Min	Hour	Min	
1	Hourly Rate - Weekday	N	6	0	19	0	▲
2	Hourly Rate - Weekend	N	9	0	17	0	
3	Hourly Rate - Stat Holidays	N	6	0	19	0	
4	Hourly Rate - Special Events	N	4	0	22	0	
5	Daily Rate - Weekday	Y	6	0	19	0	
6	Daily Rate - Weekend	Y	9	0	17	0	
7	Daily Rate - Stat Holidays	Y	6	0	19	0	
8	Daily Rate - Special Events	Y	4	0	22	0	
9		Y	0	0	0	0	
10		Y	0	0	0	0	
11		Y	0	0	0	0	▼

The bottom half of the window (Overtime Hours Setup) tells the system how you would like to split up a 24 hour day. In the example below,

- crew scheduled on a weekday for a 12-hour shift, the first 10 hours will be charged at straight time (rate x 1.0), the additional 2 hours will be charged overtime (rate x 1.5).
- Likewise, when scheduling crew for a 12-hour shift on a stat holiday, the first 7.5 hours will be charged at straight time, and the remaining 4.5 hours will be overtime.

These hourly rate structures are a guide only and can be modified when entering crew into the booking.

Overtime Hours Setup

Hourly Rate Name: Default New Edit Delete

	Straight Time Hours	Overtime Hours	Double Time Hours
Weekday	<input type="text" value="10.00"/>	<input type="text" value="10.00"/>	<input type="text" value="4.00"/>
Saturday	<input type="text" value="9.00"/>	<input type="text" value="9.00"/>	<input type="text" value="6.00"/>
Sunday	<input type="text" value="9.00"/>	<input type="text" value="9.00"/>	<input type="text" value="6.00"/>
Holiday	<input type="text" value="7.50"/>	<input type="text" value="7.50"/>	<input type="text" value="9.00"/>

✔ Save Hourly Rates
✘ Cancel

Setup Task List

In addition to configuring rate structure, you may want to review Crew Structure Parameter #2 – Task List, however some companies choose not to use this level of detail so the setting is optional.

When entering crew to a booking you can select a task from a drop down list to specify exactly what that crew member is responsible for. This automatically sets the start and end dates for the crew in correlation to the calendar times on the booking. RentalPoint comes configured with a general task list as a guideline. You may want to edit the Task Name or change the default dates and times that the system uses.

RP
Setup Tasks
✕

	#	Task Name	Default Date and Time	Type
>	0	Setup	1 - Delivery to Setup Date and Time	1 - Client Facing
	1	Operate	2 - Setup to Rehearsal Date and Time	1 - Client Facing
	2	Event Manager	3 - Rehearsal to Show Start Date and Time	1 - Client Facing
	3	Pack Down	5 - Show Finish to bump out Date and Time	0 - Warehouse
	4	new task	11 - Load to Delivery Date and Time	0 - Warehouse
	5	2nd new task	0 - Warehouse Out to Delivery Date and Time	0 - Warehouse

Note: Tasks should not be deleted once the system is operational

📄 Add

🚪 Close

Crew tasks can be set to either warehouse or client facing under the TYPE column above.

Warehouse tasks will NOT print on client facing documents by default, while client facing tasks WILL print

- Print Assignment on quote/invoice below is automatically checked when the task is client facing
- Print Assignment on quote/invoice below is automatically UNchecked when the task is warehouse facing

RP Technician Assignments - MYTEST00032

Crew Entry Notes Cross rental Entry

Designation: 3RIGGER - Rigging Technician Task: 2 - Event Manager Start Date: 06-21-17 Time: 0800 Qty: 1

Job Description: [Empty] End Date: 06-21-17 Time: 0800

Our Cost

Technician: AKI - Annie King Avail: Yes Technician Rate: 0.00 H/D: H Technician Extended: 0.00 Job Offered Status: Offered

Confirmation Level: Unconfirmed Conflict Confirmed Meet at Venue

Potential Cross rental Current P.O. # / Booking #: [Empty]

Client Charge

O/R Rate	Select Rate	Rate	H/D	Total Price
No	1 - Hourly Rate 1 @ 40.00 P/H	40.00	H	0.00

Hourly Rate Structure: Default Days: 1 Hours: 0 Mins: 0

Unpaid Time		Total Hours		S.T.	O.T.	D.T.
Hours	Mins	Hours	Mins			
0	0	0	0	0.00	0.00	0.00

Heading: 0 - Main body

Print options: Print Assignment on Quote Print Assignment on Invoice

Other Optional Crew Parameters

Take a browse through the other crew parameters available for customization in RentalPoint, however, these can also be set later.

RP Select Crew Parameter

** Crew Structure Setup **

1. Rate Structure
2. Task List
3. Secondary technician Skills
4. Timesheet Setup
5. Terminology Options
6. Setup Dress Codes
7. Default the H/D Box
8. Default the O/R Box
9. Print Times or Hours for Labour on Custom Docs
10. Crew Expenses Default Printing Position
11. Update Crew Cross rental When Booking Modified
12. Enable Minimum Crew Hours
13. Sort Technicians by Code or Name
14. Hide the OT and DT Columns and Boxes
15. Crew Default Printing Position
16. Strict Enforce of Crew Times
17. 24 Hour Day Calculation
18. Technician Confirmation Levels

Search Filter: [Empty]

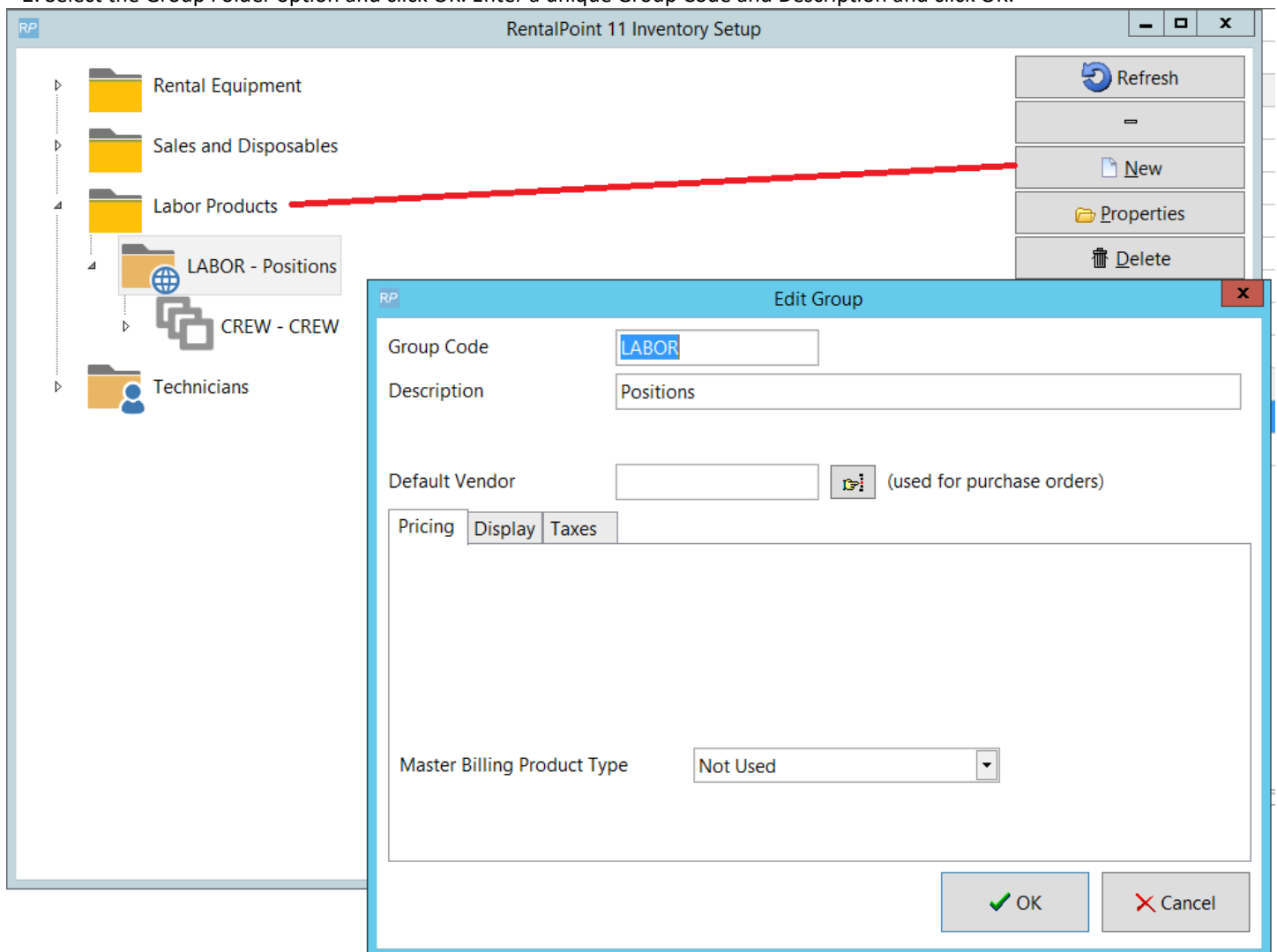
Go to Parameter: [Empty]

Setup Labour Products

Once crew parameters are ready to go, you'll need to setup your Labour Products. Labour Products can be called many different things; Designations, Crew Designation, Crew and various other terminology. These are services that your company offers via your technicians. Your company may offer services to setup a stage so you may want to create a designation for 'Stage Hand – Setup'. You may have special technicians that operate the equipment that you offer, this service would also be set up as a labour product!

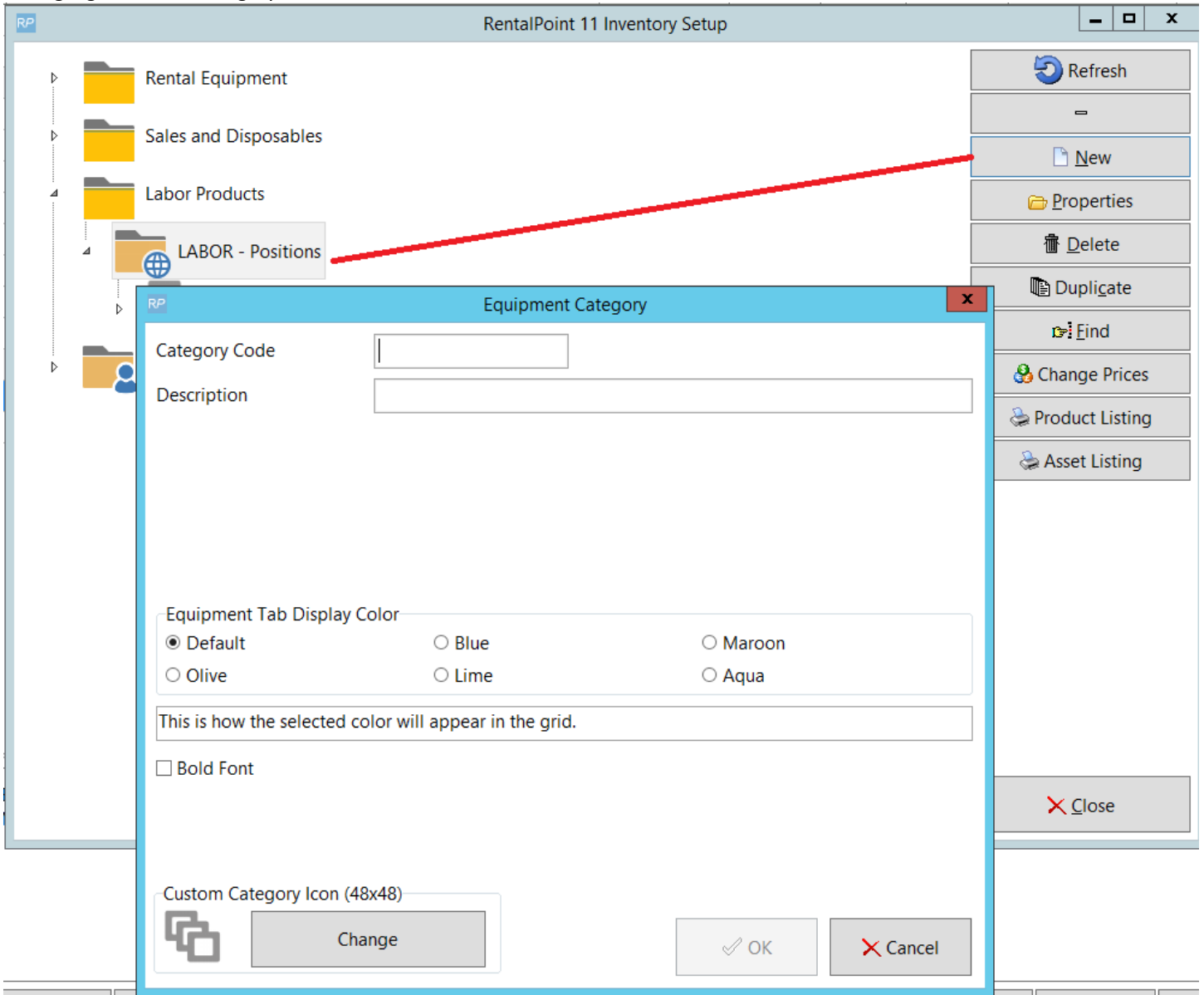
To add a labour product:

1. In RentalPoint, hit F10 to open the Inventory Setup. Highlight the **Labour Products** folder and click New.
2. Select the Group Folder option and click OK. Enter a unique Group Code and Description and click OK.



The screenshot shows the 'RentalPoint 11 Inventory Setup' window. On the left, a tree view shows folders: Rental Equipment, Sales and Disposables, Labor Products, LABOR - Positions, CREW - CREW, and Technicians. A red arrow points from the 'Labor Products' folder to the 'New' button in the right-hand menu. The 'New' button is highlighted. Below the 'New' button are buttons for 'Properties' and 'Delete'. A second window, 'Edit Group', is open in the foreground. It has a blue title bar and contains the following fields: 'Group Code' with the text 'LABOR', 'Description' with the text 'Positions', 'Default Vendor' with an empty field and a search icon, and 'Master Billing Product Type' with a dropdown menu showing 'Not Used'. At the bottom right of the 'Edit Group' window are 'OK' and 'Cancel' buttons.

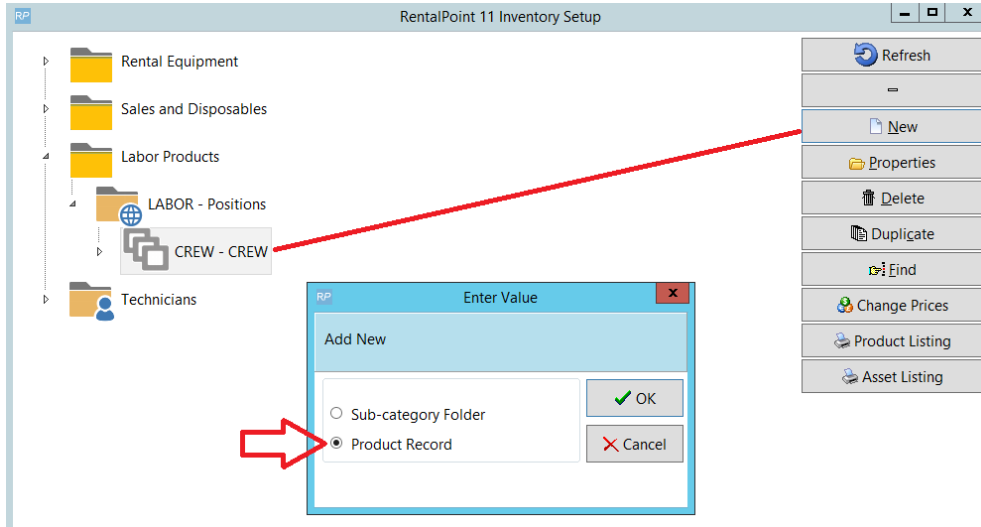
- 3. Highlight the new group folder and click New. Enter a unique Category Code and Description and click OK.
- 4. Highlight the new category folder and click New.



The screenshot displays the 'RentalPoint 11 Inventory Setup' application window. On the left, a folder tree shows 'Rental Equipment', 'Sales and Disposables', 'Labor Products', and 'LABOR - Positions' (selected). A red arrow points from the 'LABOR - Positions' folder to the 'New' button in the right-hand menu. The 'Equipment Category' dialog box is open, featuring the following elements:

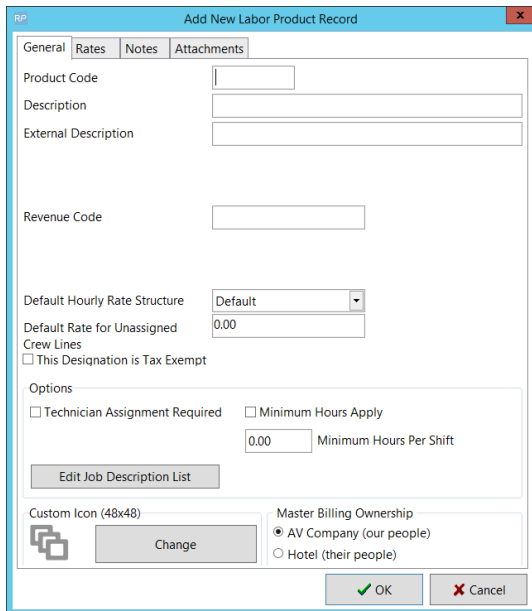
- Category Code:** An empty text input field.
- Description:** An empty text input field.
- Equipment Tab Display Color:** A group of radio buttons with options: Default (selected), Blue, Maroon, Olive, Lime, and Aqua.
- Preview:** A text box containing the text 'This is how the selected color will appear in the grid.'
- Bold Font:** A checkbox that is currently unchecked.
- Custom Category Icon (48x48):** A section with a 'Change' button and a 'Custom Category Icon' icon.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right of the dialog.

Now that the tree structure is established you can add the actual labour products to the system (ie. 'Stage Hand – Setup'). Continue reading for more detailed information about labour products.



General Tab

Enter a unique Product Code and Description, such as STAGESET and 'Stage Hand – Setup'. You can enter an alternate description that will be printed on documents that are given to clients. The Revenue Code is used to link the financial transactions to an external accounting program. Selecting the Technician Assignment Required box forces users to choose a specific technician when adding this labour product to a booking.





Setting up Labour Products and Technicians

Rates Tab

Once the crew rates have been set up in Crew Structure Parameter #1, enter the different rates for the crew. Enabling Crew Structure Parameter #12 allows you to enter minimum crew hours.

If you are using the multi location module, you can setup labour rates on a location by location basis. Select the required location (top right), enter the rates, and save. When entering crew assignments, the rates will be based on the location of the booking. Please note that this functionality is not retroactive. If you have previously entered crew assignments for a booking, you will need to reload the rates for the changes to take effect.

Rate Description	Rate	Default
Hourly Rate 1	0.00	Yes
Hourly Rate 2	0.00	
Hourly Rate 3	0.00	
Hourly Rate 4	0.00	
Day Rate 1	0.00	
Day Rate 2	0.00	
Day Rate 3	0.00	
Day Rate 4	0.00	
RATE 9	0.00	
RATE 10	0.00	
RATE 11	0.00	
RATE 12	0.00	
RATE 13	0.00	
RATE 14	0.00	
RATE 15	0.00	
RATE 16	0.00	
RATE 17	0.00	
RATE 18	0.00	

Notes Tab

This tab stores any notes about the Labour Product as well as where to print the notes.

Attachments Tab

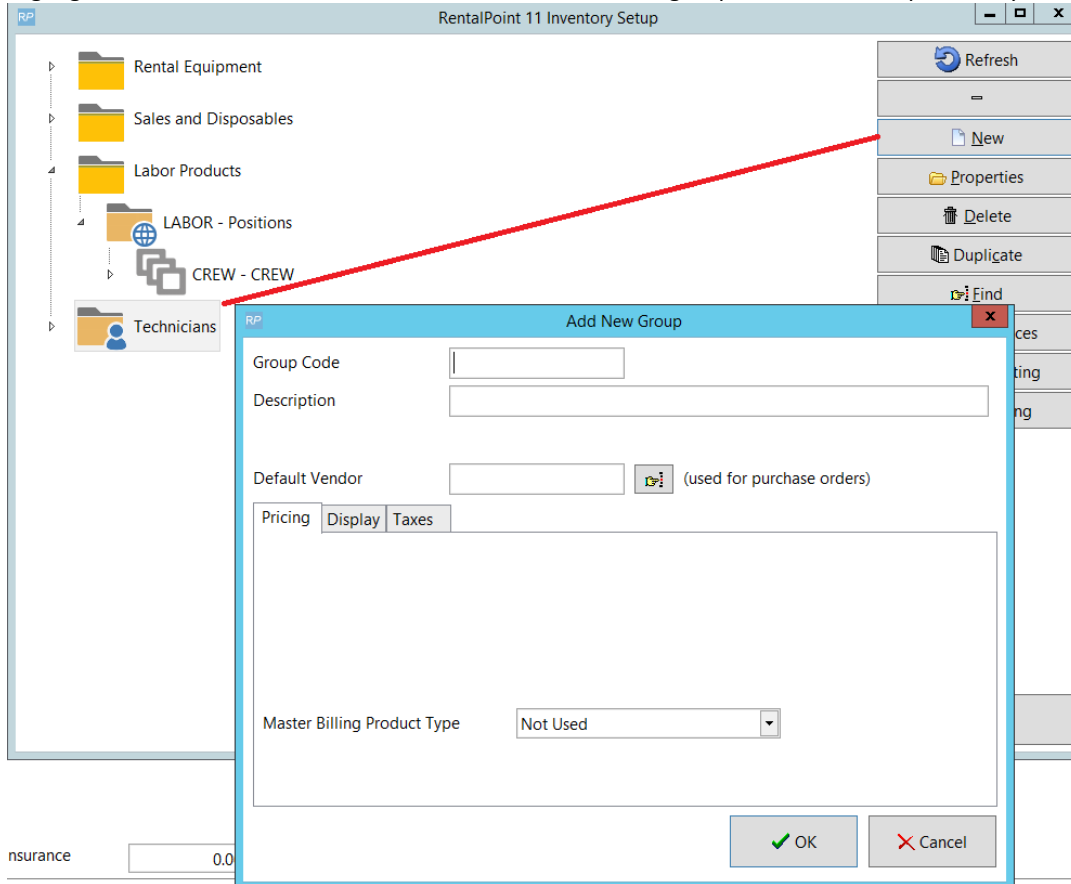
This tab allows you to attach files pertaining to the particular labour designation.

Setup Technicians

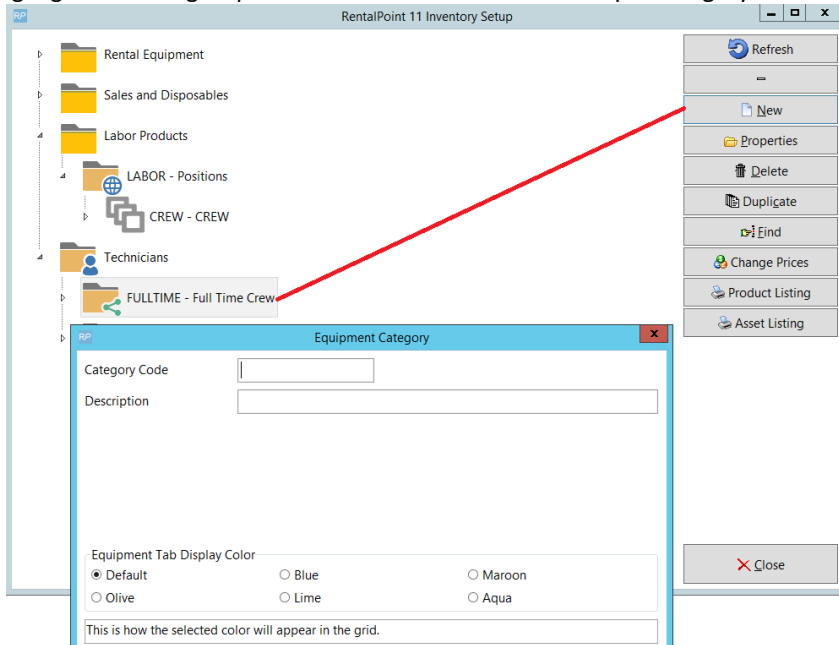
A technician is an individual person that you assign to your labour product.

To add a technician for the first time, the tree structure must first be established:

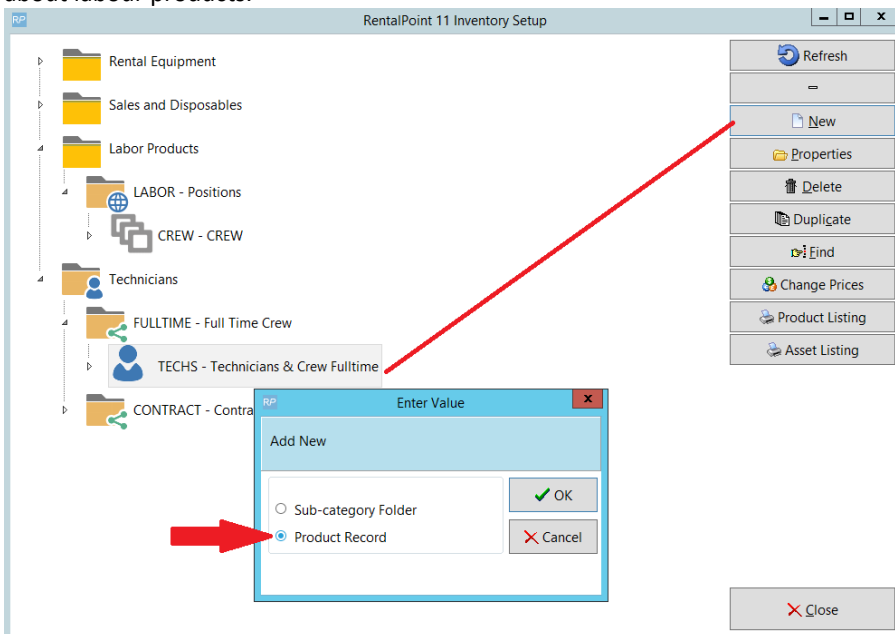
1. Highlight the Technicians folder and click New. Then enter a group code and description for your technician group.



Highlight the new group folder and click New. Enter a unique Category Code and Description and click OK.

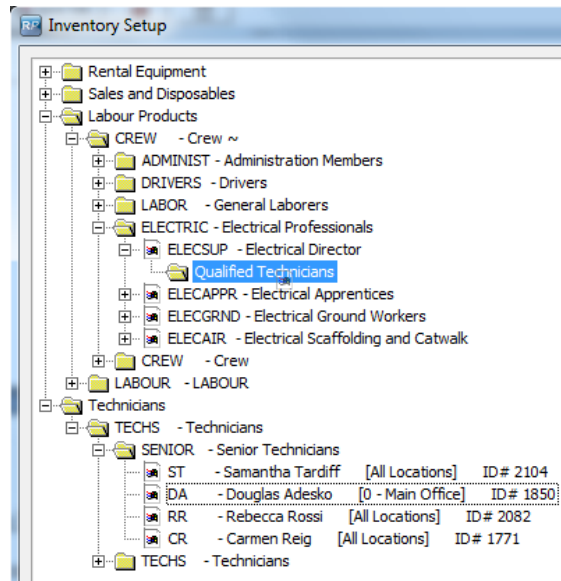


Now that the tree structure is established you can add the technician to the system. Continue reading for more detailed information about labour products.



Drag n Drop Tech to Designation

Editing the contact record is the suggested way of adding technicians to labour products, although it's not the only option available. You can also **drag and drop** technicians from the Technicians area to the Qualified Technician folder of a Labour Product. This allows operators to quickly assign large numbers of techs, though rates will still need to be setup.



Set Tech for All Designations

The final option you have to add a tech to a designation is by right clicking the tech, selecting Technician Options and assigning the tech to all, a selected group or a selected category. Likewise there are options to remove the tech. Although this option may not be useful for all clients, it greatly reduces the amount of time it takes to setup a new tech.

