

# Working with the Booking Grid

### Contents

| The Booking Grid                     | 1 |
|--------------------------------------|---|
| How do I Customize the Booking Grid? | 1 |
| Column Size                          | 1 |
| Sorting Bookings                     | 2 |
| Booking Grid Parameters              | 3 |
| Add/Remove Columns & Custom Colours  | 3 |
| Column Order                         | 4 |
| Booking Grid Scope                   | 5 |

## The Booking Grid

The booking grid shows one line of information for each booking within the scope selected. The information on the grid may be customized for more efficient viewing as follows:



# How do I Customize the Booking Grid?

#### Column Size

To change **column size**. Just move the cursor to the border of two columns, hold down the left mouse button and drag it.

| RP RentalPoin            | 11144  |                        |              |     |            |     |            |       |      |                 |         |
|--------------------------|--|------------------------|--------------|-----|------------|-----|------------|-------|------|-----------------|---------|
|                          |  |                        |              |     |            |     |            |       |      |                 |         |
| <u>A</u> ctions <u>B</u> | <u>A</u> ctions <u>R</u> eports Crys <u>t</u> al Reports A <u>s</u> sets Set <u>up</u> Others <u>H</u> elp |                        |              |     |            |     |            |       |      |                 |         |
| Bookings                 | New Find   | Open View              | Work         |     |            |     |            |       |      |                 |         |
|                          | Code   | Company                |              | Out | Date 🛑     |     | Date       | Time  | Stat | Progress Status | Booking |
| Shortages                | TIDEWATR00005  | Tidewater Builders Ass | ociation Inc | Tue | 01/04/2014 | Mon | 20/04/2015 | 18:30 |      | Quote           | Rental  |



#### Sorting Bookings

Simply click on the column title on which you want to sort the records in the Booking grid. Eg:

- If you click on the Date column title all records will be arranged in ascending order.
- If you click on the Date column title again all records will be arranged in descending order.

| RentalPoint              | : 11.1.4.4   |                             |     |            |       |     |            |       |      |      |
|--------------------------|--|-----------------------------|-----|------------|-------|-----|------------|-------|------|------|
| <u>A</u> ctions <u>R</u> | <u>A</u> ctions <u>R</u> eports Crys <u>t</u> al Reports A <u>s</u> sets Set <u>u</u> p Oth <u>e</u> rs <u>H</u> elp |                             |     |            |       |     |            |       |      |      |
| Bookings                 | New Find   | Open View Work              |     |            |       |     |            |       |      |      |
|                          | Code   | Company                     | Out | Date       | Time  |     | Date       | Time  | Stat | Prov |
|                          | BRIST00013   | Bristol-Myers Squibb        | Sun | 26/04/2015 | 10:00 | ' e | 28/04/2015 | 10:00 | RN   | Cor  |
| Shortages                | BRIST00014   | Bristol-Myers Squibb        | Sun | 26/04/2015 | 10:00 | е   | 28/04/2015 | 10:00 | RN   | Cor  |
| 2                        | BRIST00015   | Bristol-Myers Squibb        | Sun | 26/04/2015 | 10:00 | ' e | 28/04/2015 | 14:11 | RN   | Cor  |
| لعيما<br>Customers       | BRIST00016   | Bristol-Myers Squibb        | Sun | 26/04/2015 | 10:00 | t e | 28/04/2015 | 14:11 | ON   | Con  |
|                          | BRIST00011   | Bristol-Myers Squibb        | Tue | 28/04/2015 | 08:00 | ed  | 29/04/2015 | 09:00 | ΒP   | Con  |
|                          | FREE00005  | Freescale Semiconductor Inc | Fri | 01/05/2015 | 10:00 | Non | 04/05/2015 | 16:47 | RN   | Cor  |
| Products                 | FREE00006  | Freescale Semiconductor Inc | Fri | 01/05/2015 | 10:00 | Mon | 04/05/2015 | 16:47 | RN   | Cor  |
| I                        |  |                             |     |            |       | _   |            |       |      |      |

Alternatively, to sort use the drop down Sequence menu at the bottom of the grid. Just select the name of the column you would like to sort by.

|             |                                  | Freescale Sernicon |
|-------------|----------------------------------|--------------------|
|             | FISK00008                        | Fisker Automotive  |
|             | FCode                            | cale Semicon       |
| rew Plannei | FCompany                         | cale Semicon       |
| 2           | F Out Date and T In Date and Tir | cale Semicon       |
| Vendors     | <u>F</u> Stat                    | cale Semicon       |
|             | F Progress Status                | Automotive         |
| PO          | EBooking Type<br>PO No.          | Automotive         |
| POs         | Crew Status                      | ipeake Bar As      |
|             | F Project Manage                 | er Automotive      |
| <u></u>     | F Revenue                        | Automotive         |
| Contacts    | Original Opera                   | tor pert Labs      |
|             | Show Name                        |                    |
|             | Invoice No.                      | <u> </u>           |
| To-Do       | Project                          |                    |
|             | In Date and Tir                  | ne 🔽 🛛 🖾 Quotes    |



Booking Grid Parameters Add/Remove Columns & Custom Colours

> Rentalpoint offers the ability to hide some columns from the booking grid, show booking progress status in colour and show the bookings in colour. Access this option as follows:

1. Go to setup → parameters off the main Rentalpoint menu & Choose the custom Viewing Option



- 2. Check the field you want to see on the booking grid all unchecked fields will be hidden from view.
- 3. You can also choose the custom colours for your booking grid

| RentalPoint Custom View                       | ing Options                             |                                   |            |                              | ×                    |
|---|---|-----------------------------------|------------|------------------------------|----------------------|
| Booking Grid User Inte                        | erface Customer Informa                 | tion Venue Int                    | ormation   | Equipment Gri                | id                   |
| Invoice No.                                   | ☑ Venue                                 |                                   | king Type  |                              | ate Added            |
| Confirm Date                                  | Crew Status                             | 🗌 Orig                            | inal Opera | tor 🗆 Ev                     | ent Type             |
| □ PO #  | ✓ Salesperson                           | Divis                             | ion        |                              | ontract No           |
| Invoiced Status                               | Revenue                                 | 🗆 Proje                           | ect Manage | er 🗌 Pa                      | yment Terms          |
| Progress Status Select the colours that Quote | each status will display in<br>Heavy Pe |                                   |            | Cancelled                    |                      |
| Light Pencil                                  | Confirme                                |                                   |            | concence                     |                      |
| Colour Code Statu                             | 5                                       | Returned                          |            | ile Separate Co<br>s Rentals | lour Code Status for |
| Booked  | Returned<br>(Complete)                  | (Complete)<br>and NOT<br>invoiced |            | Cross Rentals                |                      |
| Out   | Bookings<br>With No<br>Status           | Invoiced                          |            |                              |                      |
|   |   |                                   |            |                              | 🗸 ОК                 |

4. Log out of Rentalpoint and back in again to see the effect of the changes you made in the parameter file.



# Working with the Booking Grid

#### Column Order

| <u>A</u> ctions <u>R</u> | eports Crys <u>t</u> al Rej | oorts A <u>s</u> sets Set <u>u</u> p Oth <u>e</u> rs <u>H</u> elp |     |            |                  |     |            |        |      |                 |              |           |       |
|--------------------------|-----------------------------|---|-----|------------|------------------|-----|------------|--------|------|-----------------|--------------|-----------|-------|
| Bookings                 | New Find Open View Work     |   |     |            | ne ord<br>e cust |     |            | se col | umr  | is display can  | Admin        | Financial | s P   |
|                          | Code                        | Company   | Out | Date       | Time             | In  | Date       | Time   | Stat | Progress Status | Booking Type | PO No.    | Crew  |
|                          | HDEWATKUUUUS                | Traewater Builders Association Inc                                | rue | 01/04/2014 | TO:00            | MOU | 20/04/2015 | 19:30  |      | Quote           | кепта        |           | INOUR |
| Shortages                | FREECAN00001                | Freescale Semiconductor Canada Inc.                               | Thu | 10/04/2014 | 08:00            | Mon | 14/04/2014 | 09:00  | RY   | Confirmed       | Rental       |           | Assig |
| 8                        | FREE00001                   | Freescale Semiconductor Inc                                       | Fri | 11/04/2014 | 0 <b>8</b> :00   | Mon | 14/04/2014 | 09:00  | RY   | Confirmed       | Rental       |           | Assig |
|                          | TIDEWATR00003               | Tidewater Builders Association Inc                                | Fri | 11/04/2014 | 0 <b>8</b> :00   | Mon | 14/04/2014 | 09:00  | RN   | Confirmed       | Rental       |           | Assig |
| Customers                | FISK00001                   | Fisker Automotive Corporate Office & Headquarters                 |     | 17/04/2014 | 0 <b>8</b> :00   | Mon | 21/04/2014 | 09:00  | RY   | Confirmed       | Rental       |           | Assig |
|                          | CUUUDSITU                   | Ofic Elevator Company   |     | 24/04/2014 | ດຂະດດ            | Mon | 28/04/2014 | na•nn  | RV   | Confirmed       | Rental       |           | Accia |

To Access this menu, right click on the booking grid and choose Options, then 'column order'

| EQUALENTS TUTT OIL          | comme                   | r territer    |
|-----------------------------|-------------------------|---------------|
| 29/0 <u>4/2015</u> 09:00 BP | Confirmed               | Rental        |
| 04/0: 🕂 New                 | hed 🕴                   | Rental        |
| 04/0! 💏 Find                | , ned                   | Rental        |
| 05/0! 🔂 View                | ▶ <mark>ned</mark>      | Rental        |
| 07/0                        | <mark>≜ ned</mark>      | Rental        |
| 07/0                        | t ned                   | Rental        |
| 08/01 🔗 Financials          | , ned                   | Rental        |
| 15/0! 🖶 Print [Fast Repo    | ort] 🕨 <mark>ned</mark> | Rental        |
| 19/0! 🔚 Options             | Booki                   | ngs Toolbar 🔸 |
| 20/05/2015 10:00 BN         | Confir Colun            | nn Order      |
| 20/05/2015 10:00 BN         | Confirmed               | Rental        |

Then Drag and Drop the column names into the order you would prefer to see them in.

- Settings are applied once you click OK.
- To revert to generic settings, click reset
- Column order is saved to the windows registry and is specific to each machine you run Rentalpoint on.

| RP Booking Grid Column Order  | ×      |
|---|--------|
| Drag 'n' Drop to place column in desired order<br>column will always be the first column in the g |        |
| Booking Type  | ^      |
| Date Added  |        |
| Event Type  |        |
| Progress Status   |        |
| Show Name   |        |
| Project   |        |
| Invoice No.   |        |
| PO No.  |        |
| Stat  | _      |
| Crew Status   |        |
| Salesperson   |        |
| Project Manager   |        |
| Revenue   |        |
| Venue<br>Confirm Date   | _      |
| Original Operator   |        |
| Division  | _      |
| Workflow  | _      |
| Contract #  | _      |
| Payment Terms   | _      |
|   | ~      |
| Reset 🗸 OK 🗙  | Cancel |



### Booking Grid Scope

The Booking Grid Scope is located at the bottom of the Booking Grid, allowing the user to narrow the selection of bookings displayed to the screen. On logout of Rentalpoint, the users booking grid preferences are written to the windows registry, so that they can be automatically loaded on next login.

|          | IVIT LEST UUU24   | mytest    |                |    |        | IVIOII | 2017-01-09 | 10.00 | rue  | 2017-01-10            | 12.00       | Nental                                 | Commu     |
|----------|-------------------|-----------|----------------|----|--------|--------|------------|-------|------|-----------------------|-------------|--|-----------|
| PO       | HARMON00011       | Harmon'   | s Audio Visual |    |        | Mon    | 2017-01-23 | 09:00 | Wed  | 2017-01-25            | 18:00       | Sub rental - Assigned To : MYTEST00018 | Confirmed |
| POs      | MYTEST00026       | mytest    |                |    |        | Mon    | 2017-02-06 | 17:00 | Wed  | 2017-02-08            | 12:00       | Rental                                 | Quote     |
|          | MYTEST00018       | mytest    |                |    |        | Thu    | 2017-02-16 | 13:47 | Thu  | 2017-02-16            | 13:47       | Rental                                 | Confirmed |
| @        | MYTEST00025       | mytest    |                |    |        | Sat    | 2017-02-18 | 10:00 | Mon  | 2017-02-20            | 12:00       | Rental                                 | Confirmed |
| Contacts | MYTEST00029       | mytest    |                |    |        | Mon    | 2017-02-20 | 12:01 | Tue  | 2017-02-28            | 12:00       | Rental Extended From : 00025           | Confirmed |
| To-Do    | Out Date and Time |           |                |    |        |        | piced      | iive  | Back | days +14 c<br>Dates N | lay: 💌      | Booking Grid                           | Scope     |
|          | List              | Plot Shee | t Projec       | ts |        |        |            |       |      |                       |             |  |           |
|          | All Ope           |           |                |    | erator | Rp     |            |       |      | (                     | Salesperson |  |           |

Some parameters that affect Booking Grid Scope are:

| • | Operational Parameter<br>#3 'Booking Grid<br>Primary Scope'                      | Primary Sort order/Sequence of the booking   |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|--|--|
| • | Operational Parameter<br>#13 'Booking Grid<br>Secondary Scope'                   | RP     Enter Value       Booking Page Secondary Scope <ul> <li>All</li> <li>Operator</li> <li>Salesperson</li> <li>Location</li> <li>Project Manager</li> </ul>  |  |  |  |  |  |  |  |
| • | Operational Parameter<br>183/Custom viewing<br>Parameter                         | Include Division in Booking Scope<br>Include Projects Tab  |  |  |  |  |  |  |  |
| • | Operational Parameter<br>124   | Project Scope and Sorting  |  |  |  |  |  |  |  |
| • | See Also Booking Scope<br>Options in security<br>settings via<br>Setup→Operators | Edit Group Record : ADMINISTRATOR         Group Name       Bookings       Sub 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         Booking Scope Options       Allow access to all Salesperson bookings (do not restrict to operator's default Salesperson)       Select Salesperson Scope       Select Salesperson Scope       Select Location Scope       Select Location Scope       Select Location Scope       Select Salesperson       Select Salespe |  |  |  |  |  |  |  |