

Working with the Booking Grid

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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.

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<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.

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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 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 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 Heavy Pe			Cancelled	
Light Pencil	Confirme			concence	
Colour Code Statu	5	Returned		ile Separate Co s Rentals	lour Code Status for
Booked	Returned (Complete)	(Complete) and NOT invoiced		Cross Rentals	
Out	Bookings With No Status	Invoiced			
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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 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 8 :00	Mon	14/04/2014	09:00	RY	Confirmed	Rental		Assig
	TIDEWATR00003	Tidewater Builders Association Inc	Fri	11/04/2014	0 8 :00	Mon	14/04/2014	09:00	RN	Confirmed	Rental		Assig
Customers	FISK00001	Fisker Automotive Corporate Office & Headquarters		17/04/2014	0 8 :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 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 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 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 #3 'Booking Grid Primary Scope'	Primary Sort order/Sequence of the booking							
•	Operational Parameter #13 'Booking Grid Secondary Scope'	RP Enter Value Booking Page Secondary Scope All Operator Salesperson Location Project Manager 							
•	Operational Parameter 183/Custom viewing Parameter	Include Division in Booking Scope Include Projects Tab							
•	Operational Parameter 124	Project Scope and Sorting							
•	See Also Booking Scope Options in security settings via 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							