



Rentalpoint Workflows

The following help document refers to Rentalpoint v11.3 and higher

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1. Background

Throughout the software there are several fields that indicate the progress or stage that a booking is in such as the "Progress status" and "Stat" on the booking window as below –

Admin

Financials

Print

Refresh

Progress Status	Invoice Nc	Stat	Show Name
Confirmed	13194	BY	Designers cor
Confirmed	89	BY	Finance minis
Confirmed	93014	RY	Hugar LTD sc
Confirmed		RN	Sample Show

Above the "stat" column shows that 1 booking has been returned and invoiced.

There is also a field inside the booking that shows the "Complete" status when a booking is ready to invoice.

Booking Invoice Status

Booking Is Complete

2. Purpose

To provide the user with a single point that shows the progress a booking is currently at, and allow additional steps to be added and changed.

3. Workflow location

The Workflow shows in a column on the booking grid as below -

Out	Date	Time	In	Date	Time	Booking Type	Warehouse	Progress Status	Invoice No	Stat	Show Name
Sat	25/11/2017	09:00	Sun	26/11/2017	10:00	Rental	Closed	Workflow	13194	BY	Designers cor
Wed	6/12/2017	09:00	Thu	7/12/2017	15:00	Rental	Closed	Confirmed	89	BY	Finance minis
Sun	10/12/2017	00:00	Mon	18/12/2017	20:00	Rental	Closed	Confirmed	93014	RY	Hugar LTD sc
Sat	20/01/2018	11:11	Wed	24/01/2018	11:11	Rental	Closed	Confirmed		RN	Sample Show
Sun	21/01/2018	09:30	Tue	23/01/2018	20:00	Rental	Closed	Confirmed	13246	BY	Family fun da
Tue	13/02/2018	09:00	Wed	21/02/2018	18:00	Rental	Site Load	Heavy Pencil		BN	master conve
Mon	19/02/2018	08:00	Wed	21/02/2018	19:00	Rental	Show Ends	Confirmed	13115	BY	
Thu	22/02/2018	09:00	Mon	26/02/2018	18:00	Rental	Deprep	Confirmed	13171	BY	master conve
Fri	23/02/2018	09:00	Sat	24/02/2018	10:00	Rental	Deprep	Confirmed	13509	BP	AXV Product
Tue	7/08/2018	09:00				Sale	Hold	Confirmed	102	BY	
Tue	21/08/2018	09:00	Fri	24/08/2018	18:00	Rental	Show Starts	Confirmed	60	BY	
Sun	9/09/2018	08:00	Tue	18/09/2018	19:00	Rental	Prep	Confirmed	13179	BY	Direct billed
Wed	26/09/2018	09:00	Fri	28/09/2018	18:00	Rental	LOAD OUT	Confirmed		BN	
Sat	29/09/2018	08:00	Tue	2/10/2018	24:00	Rental	Hold	Confirmed		BN	

The workflow steps shown above are for the warehouse.

4. Daybook Schedule

The workflow also displays on the schedule daybook.

Day	Date	Time	Booking No	Client	Address	Workflow	Room	Via
Sun	21/01/18	0930	H1018700001	Windsor Riverview Shopping	** Venue	Deprep		Delivery
Mon	22/01/18	1200	T000000000062	From Location : 5 - Auburn F		Prep		TRANSF
Tue	23/01/18	1500	T000000000062	From Location : 0 - Fitzroy N		Prep		TRANSF
Tue	23/01/18	2000	H1018700001	Windsor Riverview Shopping	** Venue	Deprep		PICKUP,

Before it will display the workflow required needs to be selected from the "Display Options", see below -

Print Equipment ✕
 Use Large Font
 Display
 Booking No Showname
 Display Workflow
 Warehouse ▼

The column that the workflow is displayed in can be selected by clicking the "Daybook Column Order" button. The workflow can be updated by right clicking the booking and the workflow column, then selecting 'Update workflow' from the menu.

After updating a workflow step, click the refresh button to display the update.

5. Workflow types

Companies normally organize their people into departments such as Sales, Warehouse, Logistics and Accounts. Each of these departments may have a different workflow. A workflow is a series of steps that are performed on the booking and are usually completed in order. The steps represent the stage that the booking is in at any time. For example - Workflow steps in the Warehouse department may be Prep, Pull, Checkout in Progress, Checkout Complete, Return in Progress, Return Complete, Closed. The workflow step may be different for each department.

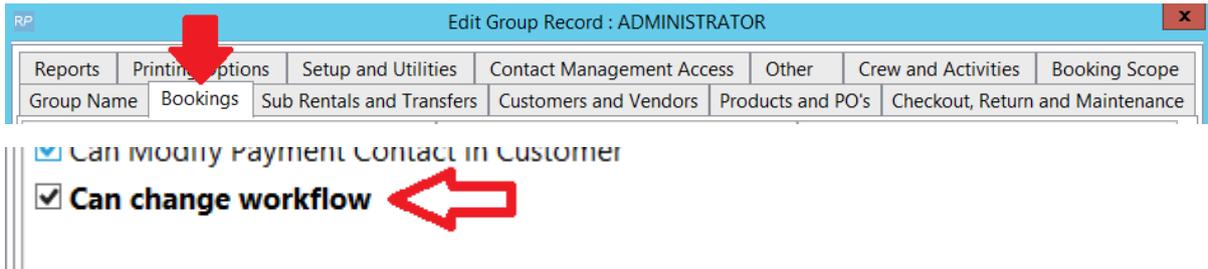
Operators may be associated with one or more departments/workflows, the booking grid will display multiple workflows at a time. Each operator has a primary workflow set in their operator record. The operator has access to many workflows, their primary workflow is displayed first on the booking grid, followed by their other works flows in a continuous string with a (colon) : separating each. Only workflows that the operator has access to are shown.

For example if an operator is linked to the "accounts" workflow then the booking grid will show the workflow steps for the accounts workflow, as below –

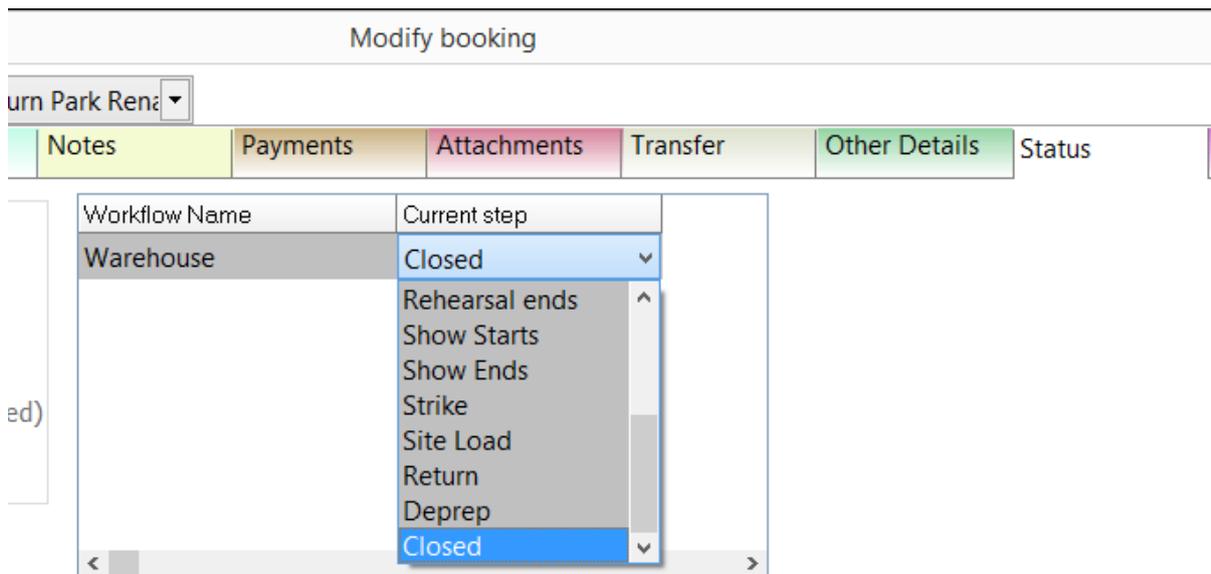
Booking Type	Financial	Progress Status
Rental	Payment received	Confirmed
Rental	Payment received	Confirmed
Rental	Final Payment received	Confirmed
Rental	Final payment invoice sent	Confirmed
Rental	Stage Payments invoice sent	Confirmed
Rental	Stage Payments invoice sent	Heavy Pencil
Rental	Deposit paid	Confirmed
Rental	net profit margin approved	Confirmed
Rental	Deposit paid	Confirmed
Sale	New	Confirmed
Rental	net profit margin approved	Confirmed

6. Updating Workflow Steps

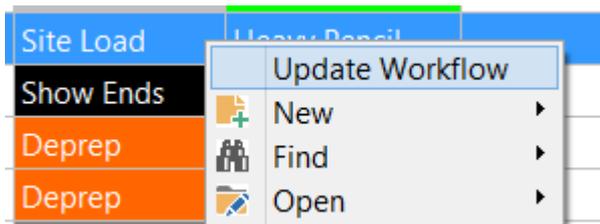
This operator privilege allows/prevents operators from changing the current workflow status. This way operators can be added to workflows so they can see the current status but will be prevented from changing it.



Updating a workflow step is a manual operation that the user can do at any time, within the booking on the "Status" tab as below –



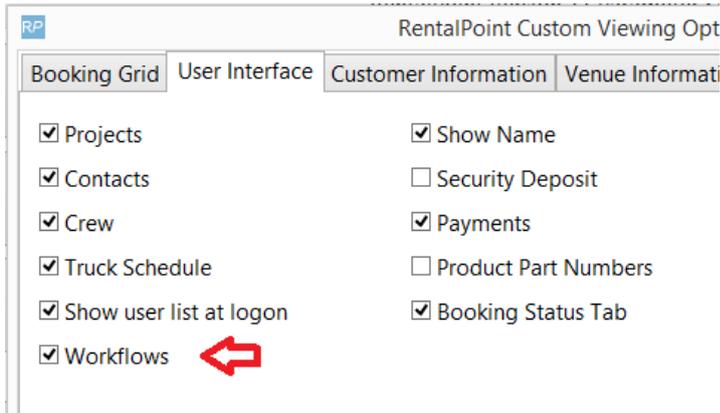
There is also a right click option in the booking grid to update the workflow, ensure you right click on the workflow field of the booking grid to see the option –



7. Setting up Workflows

In the "operator" set up, an operator group needs to be allowed access by checking the box in the "Setup and utilities" tab.

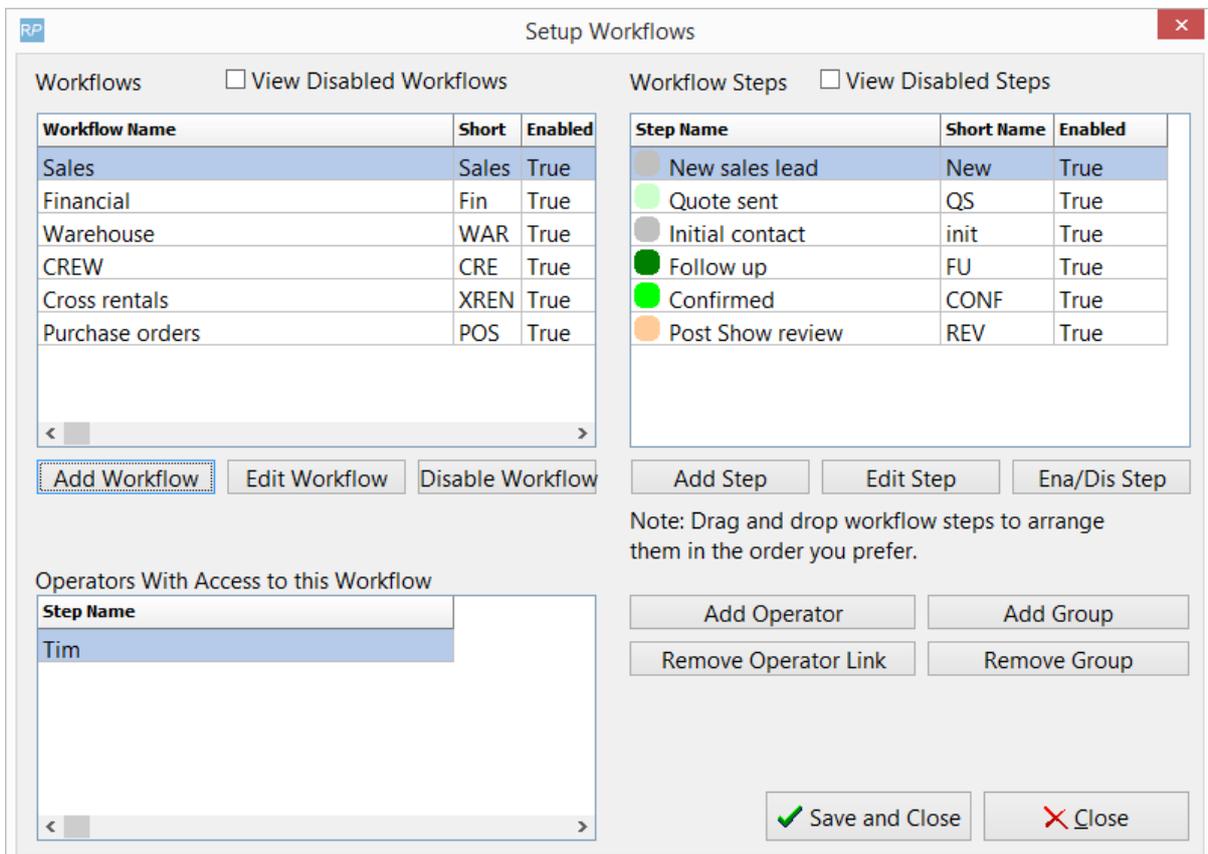
In the setup menu in the "parameters" option then in the "custom viewing", "User interface" tab window, check the box for Workflows –



Then close and re-open the software.

On the setup menu there is a menu option to set up Workflows.

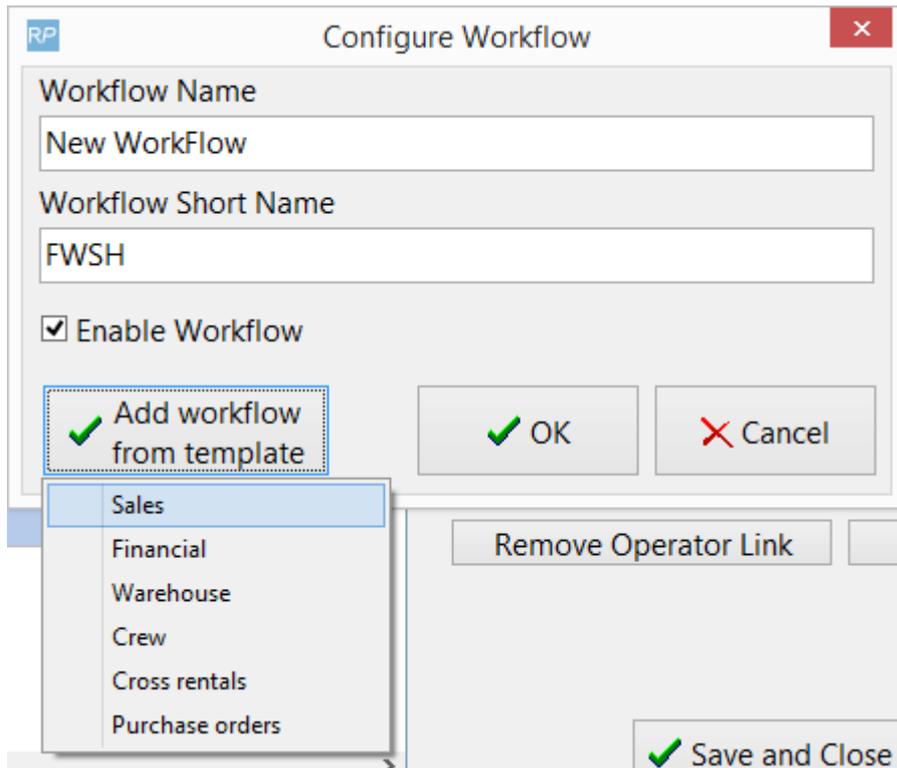
In this window new workflows may be added or disabled.



In the workflow setup window show on the last page, there are sample workflows for Sales, Financial, Warehouse, Crew, Cross rentals and purchase orders. When this window is first opened, the window will be blank. New workflows can be added.

i. Adding a new workflow

After clicking the “Add workflow” button the following window will appear –



To save time there are workflow templates that may be added by clicking the “Add workflow from template” button, then by selecting a workflow from the template a complete same list may be added.

Alternatively you may type in workflow names and short names, the short names are used on the booking grid.

You may disable workflows later by editing them and unchecking the box.

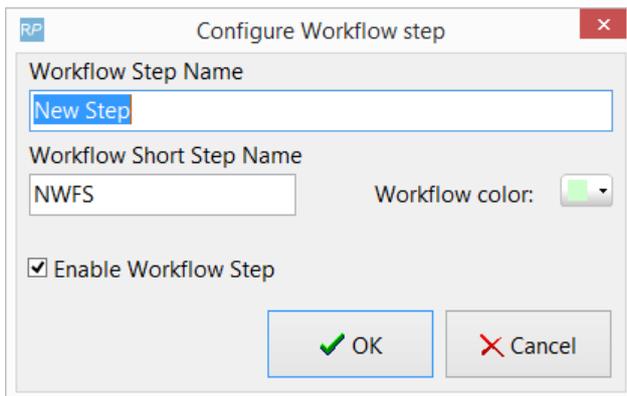
ii. Add Workflow steps

Workflow Steps View Disabled Steps

Step Name	Short Name	Enabled
 New sales lead	New	True
 Quote sent	QS	True
 Initial contact	init	True
 Follow up	FU	True
 Confirmed	CONF	True
 Post Show review	REV	True

Note: Drag and drop workflow steps to arrange them in the order you prefer.

Add new steps by clicking the “add step” button, then type in the new step name, short name and select a colour (color is US/Canadian spelling).



The dialog box titled "Configure Workflow step" contains the following fields and controls:

- Workflow Step Name:** A text input field containing "New Step".
- Workflow Short Step Name:** A text input field containing "NWFS".
- Workflow color:** A color selection dropdown menu currently showing a light green color.
- Enable Workflow Step:** A checked checkbox.
- Buttons:** "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

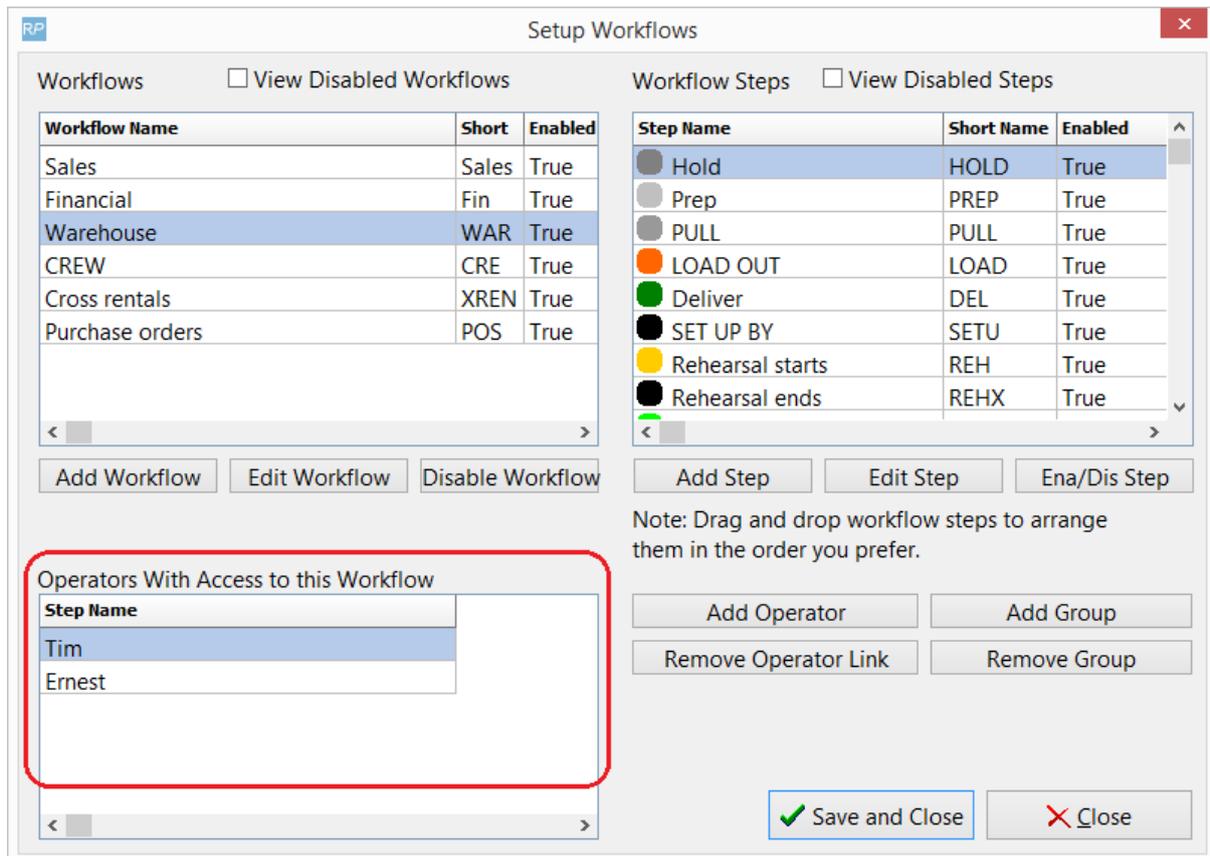
The colour selected will be used to show the step on the booking grid, but only if the operator is linked to one workflow.

 Avoid adding new workflow steps after the system has been in use for some time as new workflow steps may change the workflow step for all steps below it's insertion point.

iii. Add Operators

Add operators to the workflow by clicking the “add operator” button or the add group button.

The operators linked to each workflow will display in the window –



Workflows View Disabled Workflows

Workflow Name	Short	Enabled
Sales	Sales	True
Financial	Fin	True
Warehouse	WAR	True
CREW	CRE	True
Cross rentals	XREN	True
Purchase orders	POS	True

Workflow Steps View Disabled Steps

Step Name	Short Name	Enabled
Hold	HOLD	True
Prep	PREP	True
PULL	PULL	True
LOAD OUT	LOAD	True
Deliver	DEL	True
SET UP BY	SETU	True
Rehearsal starts	REH	True
Rehearsal ends	REHX	True

Note: Drag and drop workflow steps to arrange them in the order you prefer.

Operators With Access to this Workflow

Step Name
Tim
Ernest