



RentalPoint ToGo

RentalPointToGo works with iPod Touch/ iPhone using the built-in camera OR with matching LineaPro handheld mobile barcode scanning accessory from Infinite Peripherals. Whether you're tracking equipment that is heading out of your warehouse, or equipment coming back from rental, it's as easy as scanning the equipment! The gear is then marked as OUT or RETURNED against the booking in Rentalpoint.

The LineaPro option includes a rugged housing that makes your iOS device suitable for use in warehouses, industrial locations, and even out in the field. Please note, it is important that the iPod/iPhone matches the LineaPro device connectors.

The following versions of iOS are supported by RentalPointToGo:

1. iOS 6.1.6 (iPhone 3GS or iPhone 4, with Linea Pro 4 model)
2. iOS 8.1 (iPhone 4S with Linea Pro 4, or iPhone 5 or 6 with appropriate Linea Pro model).

Third Party Software Needed:

1. Obtain the **Apple Bonjour Print Services** for Windows 2.0.2 or later from Apple at this url and install it as well: <http://support.apple.com/kb/DI999>



Note that although the name of the program says "Print Services" what this really does is allow iPhones to be able to see the RentalPointServer service, which is using a service-discovery feature from Apple called Bonjour. Apple could have called it "Bonjour for Windows" but then they would have had just as many people confused about what that program does.





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1.0 Server Installation

1.1 RentalPointService Installation for Cloud Systems

If you use Cloud Hosted RentalPoint, please contact support@rentp.com so that our staff may install the service for you.

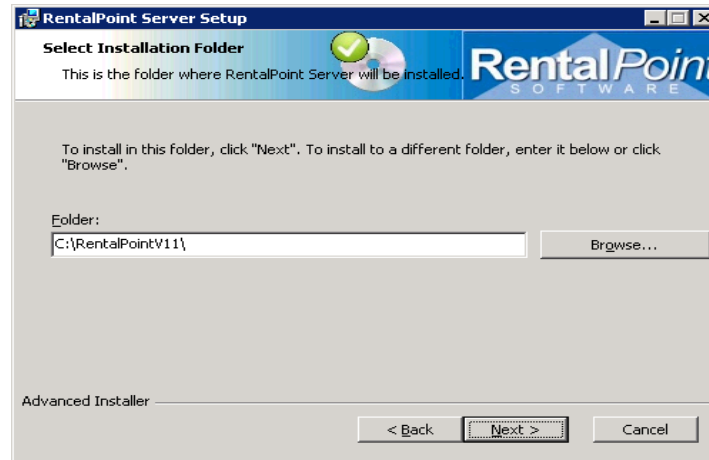
1.2 RentalPointService Installation for Private LAN Systems

CAUTION:

The Server Service should only be installed on **one computer** on your network; ideally it should be the same computer that is hosting your Microsoft SQL Server instance. If you do not know which computer that is, or where your SQL Server is running, you should contact your IT department before you proceed any further.

1. Ensure your RentalPoint system is updated to the latest release of RentalPoint (at least 10.1.2.32 or later)
2. The latest server installer is at the support site: <http://www.rentp.com/support/>
You will need a password to access the support area.
Filename: **RPServerSetup###.msi** Once downloaded, double click the msi file to install.

Note! You may receive several UAC (User Account Control) safety prompts from Windows, which you should accept, during installation. On Windows XP there is a checkbox that you must **uncheck** called **Protect My Computer**. Accepting the UAC prompt will not result in a working system, unless you uncheck this checkbox:



On the last page of the installer there is a checkbox which must remain checked that will launch the RentalPoint Configuration window. This window will help you get your server service configured and running. If you get a "Please wait..." message, it means that an attempt to discover and connect to your SQL database is taking a while; usually this requires waiting 1-2 minutes for the attempt to time out.



Click the Configure Tab

RentalPoint Web Service Configuration

Status Configure Mobile

Service Status Not installed or not detected. Click Configure button.

Parameters (Inst.dat) ✓ Parameters loaded: H:\RentalPointv11\Data\Inst.dat

License File (prodref.hdl) ✓ DEMO Enterprise [Pro] [ML/50U]

Sql Server ✓ RP-V11TEST\SQLEXPRESS

Database ✓ demo_database

Support Email Address

1.2.1 SQL ROLE Setup

This button creates an SQL Authentication login account and configures its roles. This allows SQL Access from RentalPointService when it is logged in as a Windows NT System Account.

RentalPoint Web Service Configuration

Status Configure Mobile

Service Status Not installed or not detected. Click Configure button.

Parameters (Inst.dat) ✓ Parameters loaded: H:\RentalPointv11\Data\Inst.dat

License File (prodref.hdl) ✓ DEMO Enterprise [Pro] [ML/50U]

Sql Server ✓ RP-V11TEST\SQLEXPRESS

Database ✓ demo_database

Support Email Address

Rentalpointserver

Success! Set up roles for NT AUTHORITY\SYSTEM on instance RP-V11TEST\SQLEXPRESS database demo_database



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The most common first action is to click the button SQL ROLE SETUP, especially if there is a red arrow beside it. This means your SQL Server was found and is configured properly, but does not have an SQL User Account for the RentalPoint Service. Clicking SQL Role Setup will do that.

1.2.2 Locate RentalPoint Configuration Information:

CAUTION:

Note that if a green checkmark is already showing beside the RP Parameters box and the Company box you still need to be sure that RentalPoint has found the correct files in their default locations. If you have files in the default location that are not your real live configuration files, you should fix this situation now.

If you do not select the correct inst.dat and prodref.hdl files, you will have configuration and system operation issues later. Be very careful to correctly select your active prodref.hdl and inst.dat files.

Locate your company configuration files (prodref.hdl file and inst.dat) using the Browse for Folder buttons and information from your RPINI.INI configuration file located in your main Rentalpoint system folder. Typically C:\Rentalpointv11\sys (or Rentalpointv10\sys for older versions)

```
RPIni.ini - Notepad
File Edit Format View Help

[[DIRECTORIES]]
HPSYS_DIR=C:\RentalPointv11\sys
CONFIGFILEPATH=C:\RentalPointv11\sys
HPDATA_DIR=H:\Rentalpointv11\data
HPINFO_DIR=C:\RentalPointv11\info
HPDOCS_DIR=H:\Rentalpointv11\v11_docs
ARCHIVEDOCSPATH=
HPROOT_DIR=C:\RentalPointv11
HPREPORTS_DIR=C:\RentalPointv11\Reports
[[DATABASE]]
DATABASENAME=demo_database
SERVERNAME=RP-V11TEST\SQLEXPRESS
CONNECTIONSTRING=
CONNECTION2=
USESQLAUTH=0
[[LOGIN]]
USESQLAUTH=0
LOGINNAME=
PASSWORD=
NoListOpsOnLogin=NO
Login_who=rp
[[OTHER]]
BackupOnThisSPC=NO
```

Annotations in the image:

- Red arrow pointing to `HPDATA_DIR` with label **Inst.dat**
- Red arrow pointing to `HPDOCS_DIR` with label **Prodref.hdl**
- Red arrow pointing to `SERVERNAME` with label **SQL Server**
- Red arrow pointing to `DATABASENAME` with label **Database**

After you have completed all the above steps, you should see all green checkmarks on the left side of the window. Any place where a green checkmark is missing means you still have something to fix. Ensure all information is set as per your configuration file and contact support@rentp.com if there is still an issue.

The screenshot shows the 'RentalPoint Web Service Configuration' window with the 'Configure' tab selected. The 'Service Status' is 'Not installed or not detected. Click Configure button.' with a 'Configure' button. 'Parameters (Inst.dat)' and 'License File (prodref.hdl)' both have green checkmarks and 'Browse for Folder' buttons. 'Sql Server' and 'Database' both have green checkmarks and a 'SQL Role Setup' button. A 'Support Email Address' field is at the bottom. A 'Save Changes' button is in the bottom right corner.

1.2.3 Windows Service Installation:

Once all five green checkmarks are visible, proceed to telling Windows to run the Service. Click the Configure button and then click Install. You may receive UAC prompts, and on XP you may have to uncheck the Protect My Computer checkbox.

This screenshot shows the same configuration window after successful installation. The 'Service Status' is now 'Service installed and currently Running'. An 'Information' dialog box is overlaid in the center with the message 'Service installed successfully' and an 'OK' button. Red arrows and text provide instructions: one arrow points to the 'Configure' button with the text 'Click the configure button and wait while the service installs.', and another arrow points to the 'OK' button with the text 'Once complete you will get this message'. The 'Save Changes' button remains in the bottom right.

1.2.4 Find the Server Log Files Directory

Locate the server log files directory. Services usually only have access to the System account Profile folder.

On a Windows 7 or Windows 2008 R2 system, the log files directory is:

- 64 bit C:\Windows\SysWOW64\config\systemprofile\AppData\Roaming\RentalPointService
- 32bit C:\Windows\System32\config\systemprofile\AppData\Roaming\RentalPointService

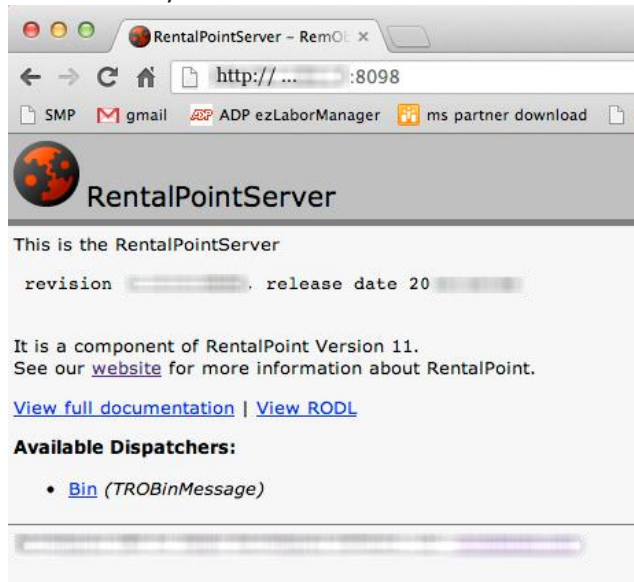
Normally you do not need to view these logs but if RentalPoint support needs them you may need to obtain these logs and send them to RentalPoint support.

1.2.5 Verify server service is running by opening a web browser

Attempt communication by opening a web browser and typing this address in, from the same computer you installed the service on.

<http://localhost:8098/>

Here is what you would see if the RentalPointServer Web Service is working:



The above web page is not a web page that you are meant to interact with, it is simply an indicator that the server service is running and ready for client applications to talk to it. It is a “web service” not a “user front end web page”.

Note that you can see a revision number and release date. This information may be requested by RentalPoint support if you are having problems with the server service or your iPhone



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RentalPointToGo operation, but can be gathered automatically from your RentalPointToGo application using the Support Email feature.

After you have the service working, try it remotely by finding the IP address of the server, and attempt communication from another computer across the network, if you expect to be able to communicate across your local area network. Doing this step now will save you time later if you have problems.

From another computer on the same local area network, open in web browser:

<http://192.168.1.55:8098/>

1.2.6 Troubleshooting Connection Issues (in order)

Localhost Connection: On the machine you have the service installed on, open up a browser window and type `http://localhost:8098`. If it fails to load the page then you most likely need to allow the service to broadcast through your firewall; see screenshots below for instructions on how to do this. You may also have to open up port 8098; see corresponding instructions below.

LAN Connection: Type this into a browser window on a different workstation on the same local LAN (Local Area Network) "`http://(Local IP Address of Server Machine):8098`" (this is testing that one of the other workstations inside your office can talk to the RentalPointServer program). If this fails, then it is probably blocked by the Server Machine firewall or you have the wrong IP address for the server. You need to make sure you are using the local IP address of the server machine and not the external IP address (from a browser window). You can find out the internal IP address, by going Start -> Run -> cmd (then press enter). Then type in 'ipconfig' and this will tell you the internal IP address in use by this machine. Should be something like 192.168.x.x or similar.

If the above works, then with the iPhone on the same WiFi network, type in the local IP address of the server into the RentalPoint App. (Page 9 of manual)

WAN Connection: To get to the RentalPoint Server program from outside the local LAN, ie from on site, at the RentalPoint office, outside your office, etc the Router will have a firewall in it and will need to be told to let in port 8098 through the firewall and forward it to the internal IP address of the Server machine. Without doing this the router WILL ignore all communication attempts to talk to the RentalPoint Server program.

Once set up you should be able to type "`http://(External IP Address of Server Machine):8098`" from any browser window and see the service page displayed.

If the above works, then with the iPhone on the any WiFi network, type in the External IP address of the server into the RentalPoint App. (Page 9 of manual)

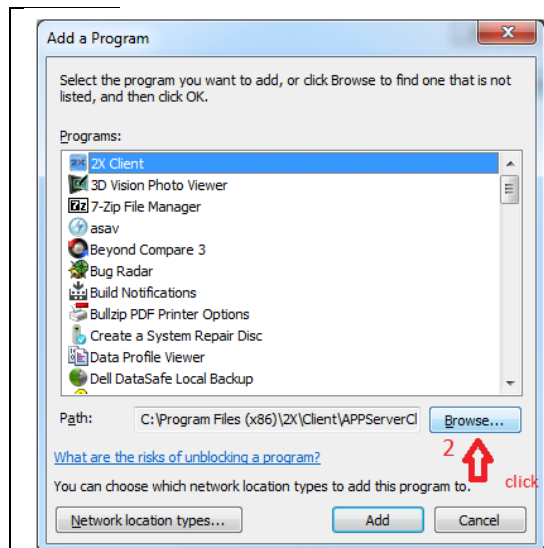
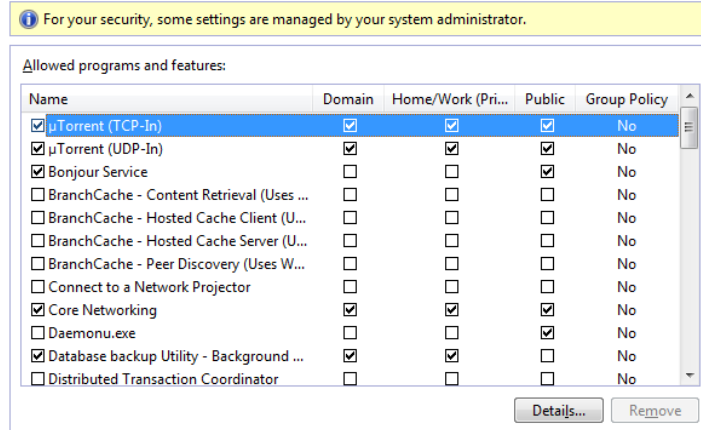
Allow RentalpointServer.exe through the firewall

Allow programs to communicate through Windows Firewall

To add, change, or remove allowed programs and ports, click Change settings.

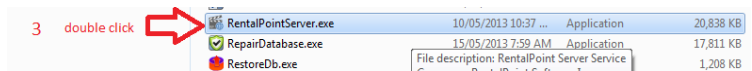
What are the risks of allowing a program to communicate?

Change settings



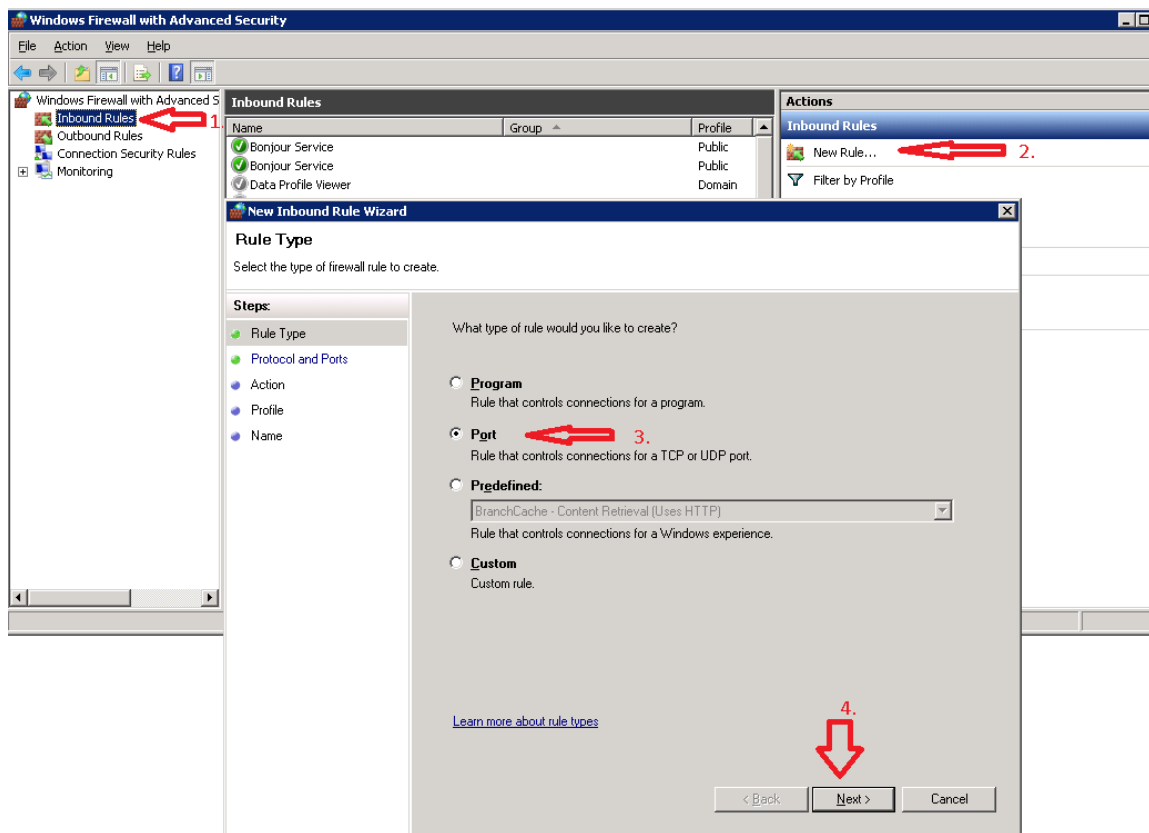
4. Click ADD and you're done! ↑

Browse for Rentalpointserver.exe in your Rentalpoint sys directory (you located this directory earlier to grab your prodref.hdl file, usually c:\rentalpointv11\sys)

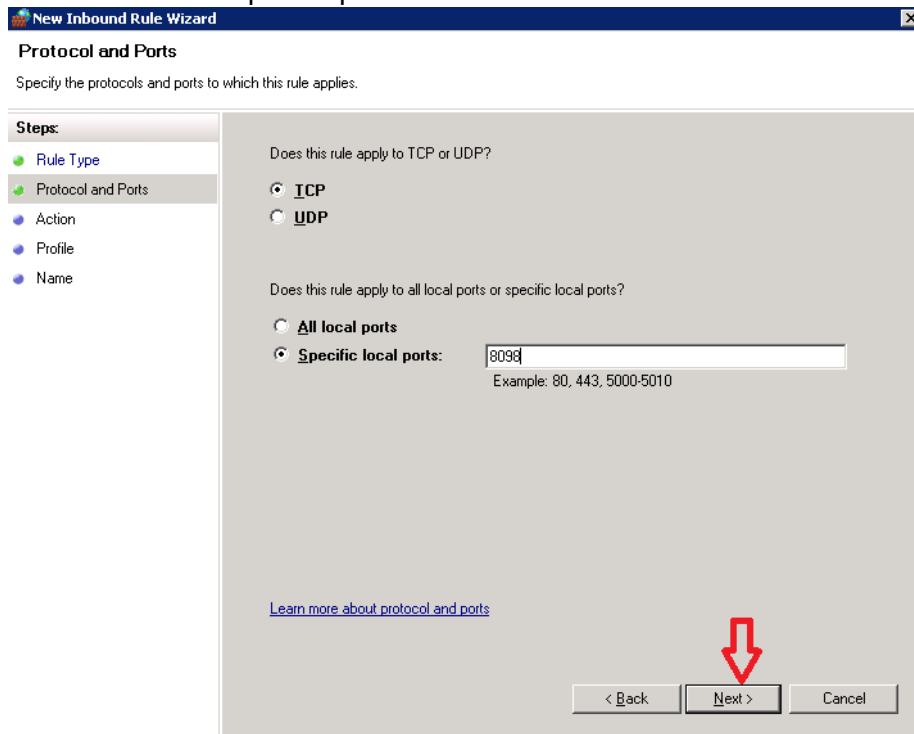


How to Open Port 8098 in Windows Firewall

1. Open Windows firewall with Advanced Security Settings (or click Advanced in main Windows firewall screen)
2. Follow screenshots below



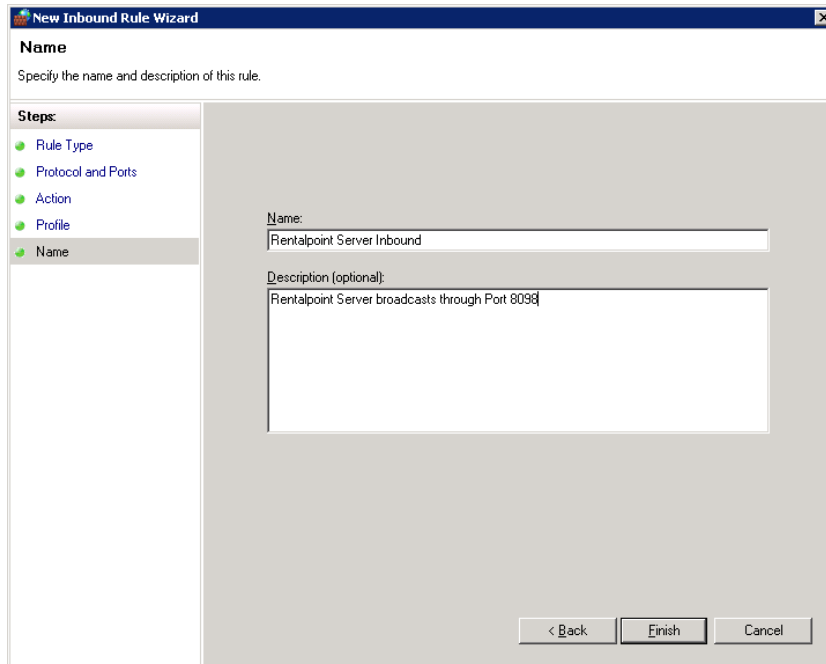
Choose TCP with Specific port 8098 and click Next



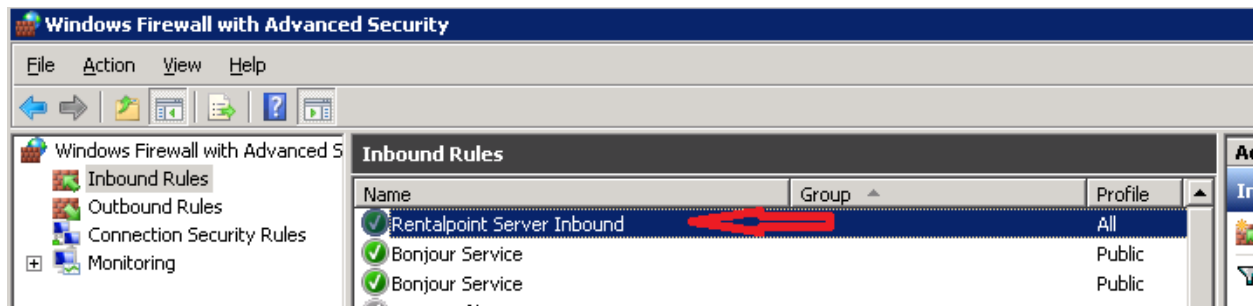
Allow the connection and click Next

The screenshot shows the 'New Inbound Rule Wizard' window, specifically the 'Action' step. The title bar reads 'New Inbound Rule Wizard'. Below the title bar, the word 'Action' is displayed. The instruction says: 'Specify the action to be taken when a connection matches the conditions specified in the rule.' On the left, a 'Steps' pane lists: Rule Type, Protocol and Ports, Action (highlighted), Profile, and Name. The main area asks 'What action should be taken when a connection matches the specified conditions?'. There are three radio button options: 1. 'Allow the connection' (selected): 'This includes connections that are protected with IPsec as well as those are not.' 2. 'Allow the connection if it is secure': 'This includes only connections that have been authenticated by using IPsec. Connections will be secured using the settings in IPsec properties and rules in the Connection Security Rule node.' (There is a 'Customize...' button below this option.) 3. 'Block the connection'. At the bottom, there is a link 'Learn more about actions' and three buttons: '< Back', 'Next >', and 'Cancel'.

The screenshot shows the 'New Inbound Rule Wizard' window, specifically the 'Profile' step. The title bar reads 'New Inbound Rule Wizard'. Below the title bar, the word 'Profile' is displayed. The instruction says: 'Specify the profiles for which this rule applies.' On the left, a 'Steps' pane lists: Rule Type, Protocol and Ports, Action, Profile (highlighted), and Name. The main area asks 'When does this rule apply?'. There are three checked checkbox options: 1. 'Domain': 'Applies when a computer is connected to its corporate domain.' 2. 'Private': 'Applies when a computer is connected to a private network location.' 3. 'Public': 'Applies when a computer is connected to a public network location.' At the bottom, there is a link 'Learn more about profiles' and three buttons: '< Back', 'Next >', and 'Cancel'.



Notice the new Rule created



- Now highlight 'Outbound Rules' and create a similar rule for port 8098 called 'Rentalpoint Server Outbound'

2.0 Installing and Using the Application

Download and install the Rentalpoint app from the app store. If the application starts without any error messages you may proceed to Logging on to Rentalpoint in section 2.4. If however there are connection error messages, follow the steps below to configure your RentalPoint network connection. Be sure you have a working WiFi connection before you proceed to use the application.



2.1 Configuring the iPhone App from your iPhone

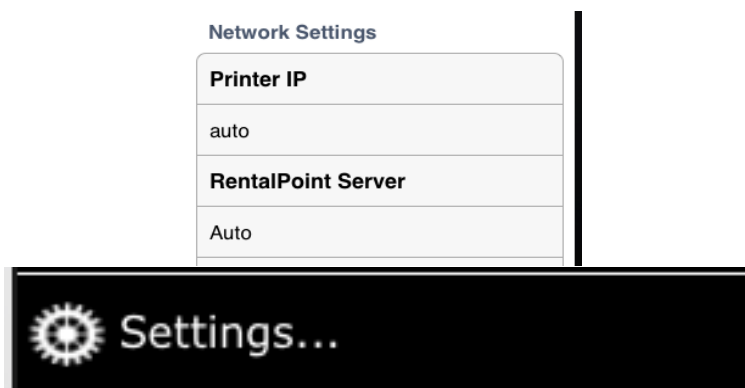
You may need to configure the network settings before you can talk to your server. Note that you also have to have successfully completed the section above showing how to run the **RentalPointServer** service before you can configure the app to talk to the server service.

The good news is that on a local area network system, with help from the Bonjour Service, the RentalPointToGo app automatically locates any RentalPointServer that is running and starts talking to it.

If you want to see if the network connection is working, simply swipe across the top bar of the application or tap the barcode icon, which will open the menu (shown left) here. Select “Bookings...” from the menu. If you see a valid list of bookings, it is working.

If the bookings screen shows a “waiting for data” or “error” message, then your system is *not* communicating properly. If you suspect a problem, tap on the Settings item in the main menu.

Locate the Network settings section and find **RentalPoint Server**. If the server is set to auto, like this,



tap it and change it to your numeric IP or your domain name for your server. (Examples: rentalpoint.mycompany.com or 192.168.1.123) Do not try to include any other “URL” type information in



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the server name field. You do not include “http://” or any other prefixes, nor any suffixes like “:8098” for the port number, as these are added automatically.

Example:

RentalPoint Server
10.100.55.123
Data Crypto Key

You should not have to change the “Data Crypto Key” for most deployments, but if you do change it, it must be changed at the server and the client side.

This is the only configuration change most users will need, however there are other configuration changes possible, including the ability to enable or disable camera mode. Camera mode is only made

Scan Hardware Options

Tap to enable camera

available if no hardware barcode scanning accessory is detected:

You may have to reset your iPhone or restart the RentalPointToGo app if the main screen does not update automatically. When camera scanning is enabled you should see the “Scan Barcode” button change its text to say “Camera Scan”:

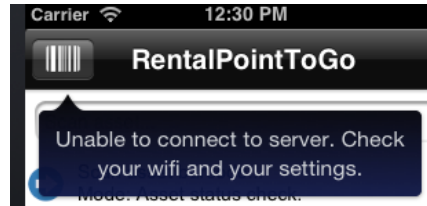
Camera Scan

2.2 Network Communication Error Indications

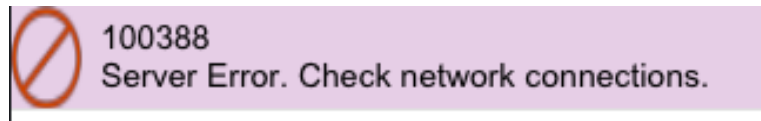
You must have a live Wifi connection for the program to work. The standard Wifi indicator should be your clue that this is not present. However, a few seconds after the application first starts, if nothing is responding, then you will see this one time indication that something is wrong:



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Secondly, while you are scanning, you will see failures like this if you have network problems:



The above error means that the barcode hardware scan worked (the value scanned is shown) but the text "Server Error. Check network connections." means that no RentalPoint server could be contacted. A wifi connection problem could also cause these issues.

2.3 Connecting to Your RentalPoint Server

The default server name is "auto" if you go into the Settings page, and view the settings and see auto, then the server will automatically be detected if it is on your local area network.

You may also enter in special names, if given names by RentalPoint support staff to try, to connect to test systems or demo systems hosted by RentalPoint on the internet, also known as "cloud systems".

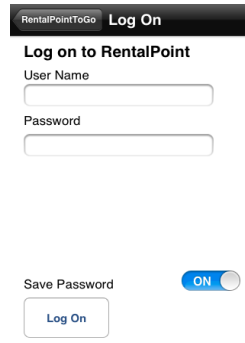
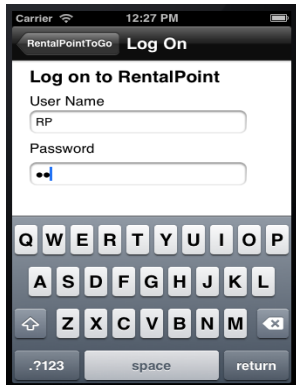
2.4 Logging on To RentalPoint

When prompted to do so, you should simply input your user name and password as you would on the regular rentalPoint program. Note that auto-completion of your user name is not possible on the iPhone app. Your user name and password in RentalPoint are not "case sensitive", that is it doesn't matter if you enter "Mark", "MARK" or "mark" as your user name.

If you save your password, then the device will be automatically able to log in as whatever account you wish to use. Note that if you want to log barcode scanner activity and associate it with a unique user, but you want to share devices, instead of having one device per user, then you should not turn on the save-password slide option.



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If the keyboard is visible and you wish to continue, press the return button on the onscreen keyboard, and the program will continue with login.

2.5 The App Main Menu

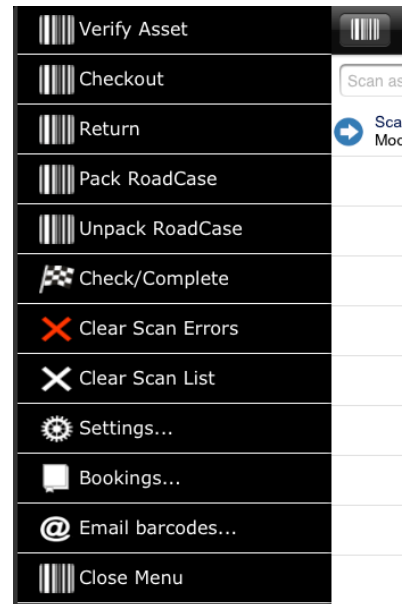
You can tap on the barcode button at the top left to slide the menu out. Tapping the icon again when the menu is open, will close the menu.

Selecting an item from the menu will also cause the menu to close. This is something like a “pull down menu” idea from a desktop computer application, but it is a “slide out menu” so that it does not use up much of your small device screen.

The commands in the menu are first, the modes that the program offers, including Verify Asset, Checkout or Return Items, Packing a RoadCase or Rack, or Unpacking a RoadCase or Rack.

After you have completed all of the items you are checking in or out, you can use the Check/Complete menu item to tell you if there are problems or if you have missed some items that were expected to be packed or unpacked.

The two Clear commands are used to remove only error items (the red X icon) or to clear everything when you want to clear the screen so you have a fresh view.



Clearing is not the way to access the Undo feature: Note that clearing the screen does not undo the actions you have done. If you want to undo an action you must do so by deleting that item, and following the prompts to undo that action, if possible. Not all actions have an undo. Checkout items can be undone, but return items cannot. You must re-check out an item to cause the same effect as an undo of a return.



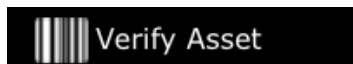
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3.0 Core Operational Concepts

The next section covers primary uses of the program. These include checking out items for bookings, and returning items for bookings, as well as packing and unpacking roadcases and racks.

3.1 Modes and Errors and Key Icons and Concepts

Your RentalPointToGo app is in one and only one “mode” at a time. Those modes are shown in the main






menu with a barcode icon, like this:


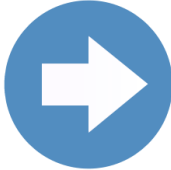



That mode is also shown at the top of the screen while you are working:

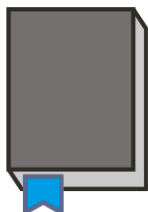


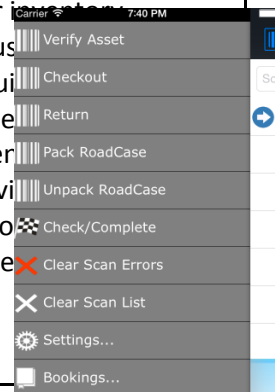
In the example above, a booking checkout is in progress, a booking has been scanned, and the first item that was scanned is not reserved in the booking, so it is being shown with a red “booking/reservation error” icon. Working with the program means understanding the icons it shows. These icons are intended to help you use the program, and to keep you from having to read a wall of text any time something goes wrong. The discussions here are long and we hope that they help you understand thoroughly what each of these icons means.

Icon	Meaning
	Not Reserved: This item has not been reserved in this booking, or this item has been added to the booking, but a shortage exists, with the net effect that you cannot safely check this out right now without possibly causing a shortage, or “poaching” assets that are reserved by another booking. If you want to be sure that it is safe to “add” such an item to the booking, you must complete your checkout from the main program.

Icon	Meaning
	Substitution: This item is a modification or extension to a booking, where one product is being substituted for another product. Like the situation above with no-reservation errors, this kind of operation must be finalized in the main program.
	Rule Error: This icon means that a server error has been returned, and your operation has not been completed. It usually indicates that a “rule” was broken by what you were trying to do. Checking out an asset that is already checked out to a different booking, or which is marked as sold or disposed, is typical.
	General Error: This icon means a general problem has been encountered that might require some troubleshooting to resolve. For example, if you scanned a barcode, and an error during the scan process resulted in one less digit being scanned than was really required, then this barcode was “invalid”, but the cause could be the barcode being illegible or obscured, or it could be that this barcode was scanned entirely properly, but that the value does not exist in your RentalPoint database. Transient problems like network communication errors will also show this icon.
	Test Required: Some assets are tested either every time you return them from a booking or on a periodic date by date basis. If a system rule is set up that you must test an asset before checkout, before return, or before packing it in a roadcase, this reminder icon accompanies a message telling you to test this asset. Sometimes a button that says “Tested” will be provided to let you indicate and record that a test was performed.
	Asset/Success: This is a success-indicator used when you scan an asset-tracked barcode, either in verify-asset mode, or in a booking Checkout or Return. It is intended to tell you that this barcode uniquely identifies a single asset, and if you are in checkout or return mode, that you have completely part of the task you were doing.

Icon	Meaning
	NonAsset/Success: This is a success-indicator used when you scan a non-asset-tracked barcode. A non-asset tracked barcode identifies something at a Product level, not at an individual asset level, and can be used to quickly “check out” a quantity out of a “pile of identical items” in your inventory. It is only possible to return such items by their barcodes after you first scan a booking number, because it is impossible to know just from the barcode, which booking these items are from. During checkouts, and returns, this type of barcode sometimes prompts you for a quantity which you must manually confirm.
	Prompt: This is a prompt icon used to indicate that this row is just one step in a multi-step, multi-barcode-scan operation. For example, when unpacking a roadcase, or packing a roadcase, there could be several of these icons shown as part of the process.
	Rack/Success: This icon means that this is a Rack Item that contains other items, which are more or less permanent fixtures. The difference between a Rack and a Roadcase from RentalPoint’s point of view is that a Rack contains equipment which is installed once, and then shipped out as a unit, and not usually disassembled, unless repairs are required or customers require some customization.
	Roadcase/Success: This icon means this is a Roadcase, which holds items for safety during shipment, but typically Roadcase items do not have a permanent association with the assets packed inside them. For this reason, roadcases are “re-packed” each time you check out a booking, so that you can say that “items A,B, and C went out in roadcase D”.
	Pending: This icon is what is used on the screen to indicate that you have begun a process which involves collecting barcodes and storing them in the database, but which must be finalized or applied in the main program. Examples of pending operations include adding something that was not reserved, or doing a substitution.

Icon	Meaning
	Booking: A booking represents the fundamental element of RentalPoint. Customers would like to rent or buy some equipment, and your management, shortage resolution, and availability checking, plus quote the customer a rental or sale price on a series of core equipment and their related accessories, is stored in a Booking. A booking is the sale, and rental transactions are managed by the system. On RentalPoint only a very small percentage of the information in a booking is visible. The details that you do see are intended to be those that a person in a warehouse shipping out and receiving back equipment would need.

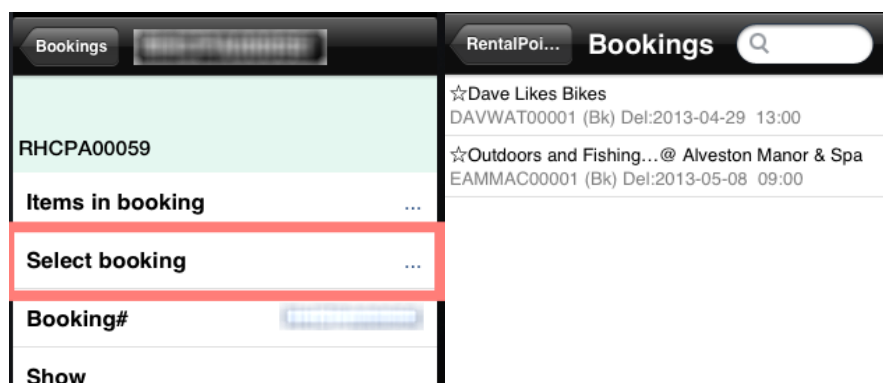


3.2 Selecting a Booking using the Bookings Search Screen or via Barcode

There is a booking search feature which you can type any keyword you want to search, and find the bookings that match the keyword.

Tap the top left icon to open the main menu, and then find the bookings menu item:

It is intended to help you search for and select a booking so you can use it to do a checkout or return, or to pack a roadcase for a booking. It is not the only way to select a booking, as you could also print out



your booking documents with a barcode on them, saving you from a source of user error.

To see bookings due for checkout in the next 7 days type an asterisk into the search window: *

Once you have searched and found the item you want, tap that item to select it, and you will navigate down one level into a details view for that booking, that currently only shows the same information as



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the top level view but which has room for the text which might have gotten clipped off by the small size of the main screen. You can select this booking by tapping the “Select booking...” menu item, and if the booking is valid for checkout and return, you will be given a choice of going into Checkout or Return



mode, as shown here:



The main screen after you select checkout would look like this:

If you selected Checkout, you would be back in the main program screen but with a booking selected, it will look like a book, showing the booking code, and a one line summary about that booking. The (0) on the title indicates that no asset-tracked or non-asset-tracked inventory items have been scanned. If your booking documents have a barcode on them that contains the same text as the booking code (booking “numbers” almost always contain text in RentalPoint) then you could just scan that booking number’s barcode instead of using the booking screen.

Note that once you have selected a booking and the booking is on the main screen, and you are in Checkout or Return mode, you can tap that booking item to view details of that booking, including a summary of all reserved assets, with current counts showing which items are out and which items are not out:



3.3 Scanning Barcoded Assets and Manually Entering Asset Identifiers

This section assumes you have already selected a booking you wish to Check Out or Return.

Scanning barcodes is done in two different ways depending on whether you are using the LineaPro barcode scanning hardware or not.

If you have the Linea Pro barcode scanning engine and rugged iPhone case hardware, you will want to either press the physical button on the device or else use the on screen scan button.

If you have no hardware, check the appendix to see how to enable camera based scanning.

Of course this application is mostly designed to help you scan barcodes and then detect problems if you scan something that was not the right thing for this booking.

If you have asset-tracked and non-asset-tracked identifier codes that you wish to use with this program, to input the code manually instead of scanning the barcodes, you can do so, using the text field at the top of the main screen. The same error-checks are applied whether you input the data manually or with the help of barcode scanners.

A big part of working in a warehouse with a lot of inventory flying in and out is to watch for mistakes and catch them. That is where the handheld iPhone or iPod touch app can really help you the most.

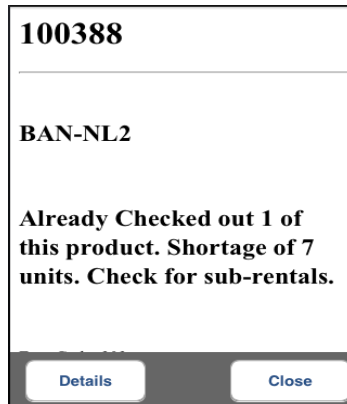
In order for this application to help you, you should learn about the kinds of errors that the program can catch, but also learn about the kinds it can not catch. By being aware of the errors that the program can catch for you, and the ones it can not, you can minimize your chances of sending customers the wrong inventory items.

3.4 Adding Assets to a Booking at Checkout versus Scanning the Wrong Items:

A very common sort of mistake you might make with this application is to scan a barcode for something which was not reserved on the booking you are checking out. There are sometimes cases where you really do want to add something at checkout, such as spares, or substitutions. However in that case, if you scan something that was not reserved, the error indication shown here can be overridden by tapping the Add button, which will save the barcodes you want to add to the booking into your rentalpoint database. Normally however you should first ask yourself "Was this a mistake?"

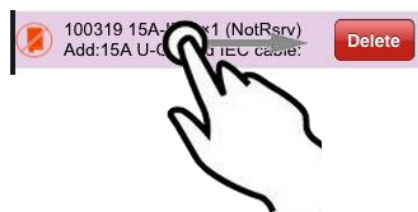
There are many kinds of mistakes. Scanning the wrong item. "Stealing items" from one booking where they were reserved, to fill another where no reservation existed, and many more. You can see many kinds of errors on the screen of your iPhone RentalPointToGo app, but there are some mistakes that can not be detected by software.

Before assuming that it was not a mistake you should always view the entire message from RentalPoint, which might be too long to fit on the screen. By tapping on the error item area



(anywhere but on the Add button) you can enter a screen where the full text of the message from RentalPoint can be shown: In the above case, you have a product code that has 8 reserved, and 1 is checked out, but you should not check out any more because there is a shortage, and a previous booking has priority, and those assets are reserved. Most likely in a case like the one above, someone should have already resolved your shortage before they asked you to ship the booking, and perhaps they have, by creating a sub-rental. Normal you would tap the back icon or the close button to close out of the screen above after you have read the entire message.

In the case of a mistake you can get rid of the red error row on your screen by using the swipe left or right gesture, then tapping Delete. This is a standard gesture on iOS and is used in lots of places, such as the built in mail-app where it indicates "I want to delete this email from my inbox".



Any red error indicator that is in the shape of a book, as above, indicates that none of that particular product code was reserved in that booking, and so you cannot directly check out that item. If you do select the Add button, your choice will be saved in the rentalpoint Database, but because your choice will mean that someone has to make decisions about pricing of the extra items that are being added, you must use the main RentalPoint program to import and apply those extension-items (see section 3.4.1 below) . Items added at checkout are extensions to a booking, and should be done in the main program so that you can check for and resolve shortages, resolve pricing or no-charge status for the extra items, and so on.

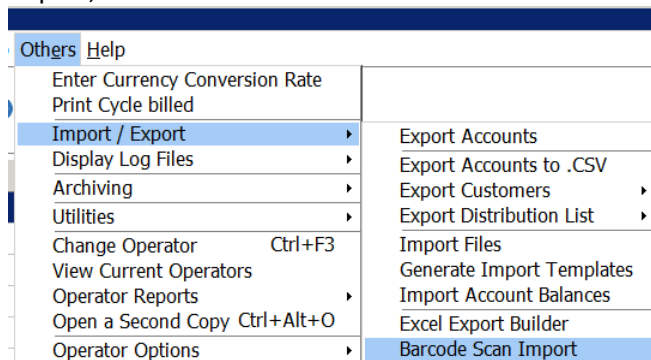
3.4.1 Finalizing the addition of Equipment using RPToGo

Checkout is the name given to the process whereby assets are scanned out of the warehouse.

- While barcode scanning items at the checkout or prep stage, quite often assets are substituted or accessories added.
- These assets may not have been included in your booking and the RPtogo App will ask you to finalize the addition of these assets in the main program.
- This is because the RPtogo app does not have all the sophisticated tools built into it such as the ability to check availability (to check that there is a sufficient quantity of the product to cover other confirmed bookings) or to calculate prices and add them to a booking.
- So the assets added to a booking in the checkout process using the RPtogo app must be added to the booking using the procedure outlined below.

To finalize the addition of assets to a booking:

1. From the main Rentalpoint menu go to the “others” menu -> import / export -> Barcode scan import, as below -



Then this window will appear showing only the assets “Added in the checkout process” on the IOS App (RPToGo). It will not contain all the barcodes scanned.

2. The next step is to select the equipment from a booking, you can only process one booking at a time. Then click on the button to “copy barcodes to clipboard”.

RP Import Barcode Scan Codes

This feature is designed to let you copy all barcodes for a single booking/session at a time. If there are multiple bookings awaiting checkout or return, you have to use this window repeatedly, per booking.

Date	Operation	BookingNo	Barcode	First Name	Last Name	Login	Description
	No Data						

All items

Copy Barcodes to Clipboard Cancel

- The next step is to select the booking on the main booking window and open the checkout window, then navigate to the "Enter barcodes" tab as shown below.

RP Checkout equipment, booking: 001-MEYD00011 from Location :0 - Fitzroy North

Enter Barcodes Scanner Sessions Current Session Equipment Out Returned

Scan One or More Barcode(s) :

Checkout Barcodes

Paste the barcodes in here (press <CTRL> <Insert>).

Scan Quantity (Shortcut Ctrl-S) Note: 'Scan Quantity' only affects non-asset tracked items. Any quantity entered for an asset tracked item will be disregarded.

Enter road case barcode to pack/unpack

Pack Unpack

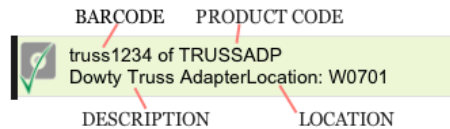
Serial # Search From file

Checkout Date 18/11/14 Checkout Time 0014 Checkout Type Partial Final

Check Open Identify Shortages Product Setup Save Cancel

- Click the memo tab on the left and press <CTRL> <Insert> to paste the barcodes in. Then click the "Checkout Barcodes" button as above, then click the save button.

3.5 Normal Scans : No Errors or Warnings



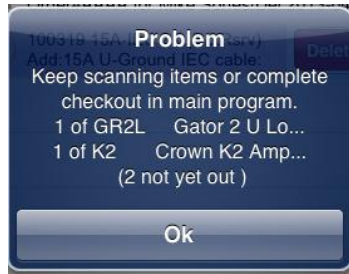
The gray icon above is the standard icon for an asset-tracked item. The green checkmark indicates that the selected operation had no errors, and the descriptive text should be useful in confirming that the barcode you scanned and its description matches what you expect. Obviously the software cannot help you if you had the wrong barcode attached to an item, unless you read the above text and manually confirm that you have correctly scanned an asset barcode that corresponds to the real equipment you are checking out or returning. What we are saying here is that even a green checkmark indicates only that the software thinks everything is okay. The human being has to be aware that mechanical errors at this stage are still possible, if barcode tags were incorrectly applied. It is also possible that the barcode may not be unique in your database and the wrong value above may indicate a database problem. All this discussion is to help you understand what the program can and cannot help you determine automatically. Where possible red indicates an error, and green indicates everything is good (so far as the program can determine). Yellow indicates warnings.

3.6 Checking for Completion and Finalizing Checkouts and Returns: Am I finished checking out yet?

Normally you would have a printed “pick list sheet” which you use to determine if you have packed and reading everything for shipment. However it is possible that even with such a printed list you may overlook some item which is required. For that reason, a “Check/Complete” command is provided in the menu.



If you are missing something you will be prompted with at least some of the items that are missing. If there is a very large list of items missing you will only be shown the first few of them. It is enough to know that you are not complete and at least a few of the items you missed are listed. If you really needed to do so, you could check out those listed items, then tap check/complete again and repeat that until you are finished, but if you find yourself doing that you might want to ask what the problem is with your documents, or your warehouse procedures, and try to find a general way to make sure that you have checked out everything in your list.

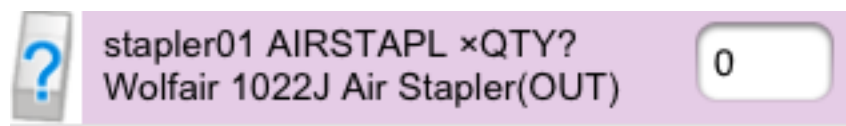


You will also be told if you have checked everything out but you have items pending. A pending item means you tapped “Add” to add an item to the booking at checkout. Because this additional item must be added to the booking and pricing information must be altered, or at least, a “no charge” status must be authorized by a rentalpoint user with security authorization to authorize additional equipment at no charge, this is done by the main program. See the appendix for instructions on importing barcodes into the main program from your iPhone RentalPointToGo app.

If your system has been configured to allow finalization of checkouts or returns from your handheld unit, this command will actually mark your booking as Checked Out if there are no errors.

If you really cannot finalize your checkout or return on your handheld, because some special case has come up, you may find you need to use the main program. You also may find that the main program’s document generation capabilities are an important part of your checkout and return workflow. In those cases, what you do is “check if you are finished” and then the iPhone app will prompt you to finalize your checkout or return at the main program.

3.7 Entering Quantities of Non-Asset Tracked Items



A non-asset tracked item is displayed like this:

You might have a box of individually barcoded cables that all have exactly the same barcode on each cable because they are considered to be low-cost and interchangeable. (If you find a bad usb cable you would probably discard it, and just decrease your overall quantity on hand, but not care to know that it was cable 102 out of 500 possible unique usb cables.) Thus the icon is intended to remind you of an “open top cardboard box or bin” where a number of identical widgets could be kept.

In the case pictured above, the light red indicator is intended to make you notice that further input is required. It is also indicating that if you do not proceed carefully here, you may be making a mistake. The indicator (OUT) is being shown which means “Someone already checked out all the items of this type that were reserved in the booking”. However because the bookings can be extended at runtime,




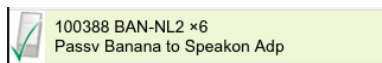
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you are allowed to enter a number here and confirm that you want to add more items (spares, or substitutes) at checkout.

If the quantity you are about to input is not entirely out, instead you should see the quantity out already, and the reserved quantity in this form: “(1/7)” means “1 already out, 7 reserved”. In that case, the program populates the remaining quantity for you, and when you tap on the text field, the numeric input keypad should come up along with Apply and Cancel buttons:



If you have to modify the quantity it has pre-populated, click the delete () button. You could then check out 4, instead of 6, for example, if you cannot find the last 2 items. Normally you would just go get 6 of the widget in question, pack them however you usually package or pack them, and then click Apply. Success would look like this:



4.0 Common Task Checklists

Until you become more familiar with the program you might want to keep these quick task checklists handy so you can see the steps you should follow for each tasks that you would accomplish with this program.

4.1 Steps in a complete Checkout

- I. Scan or select your booking. Answer “Checkout” when prompted for mode.
- II. Scan or select all assets in the booking
- III. Use the menu to select Check/Complete.
- IV. If necessary, complete checkout finalization in the main program.

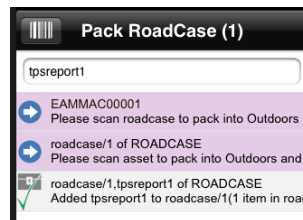
4.2 Steps in a complete Return

- I. Scan a booking (optional for asset-tracked items, required for non-asset-tracked items. However scanning a booking first is always better because it allows the program to check for more operator mistakes.). Answer "Return" when prompted for mode.
- II. Scan items to be returned (returning non-asset-tracked items to a booking requires you to select the booking first. Returning)
- III. Click Check/Complete when you are finished.
- IV. If necessary, complete return finalization in the main program.

4.3 Steps in packing a roadcase.

- I. Select Pack Roadcase mode using the main menu.
- II. Scan a booking or select it from the bookings screen. *This stage is optional for Racks and non-optional for roadcases.*
- III. Scan a roadcase barcode.
- IV. Scan all assets that are to be packed into this roadcase.

Example:



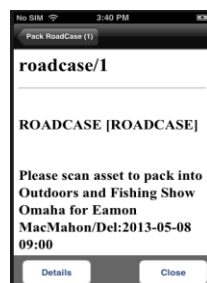
4.4 Steps in unpacking a roadcase

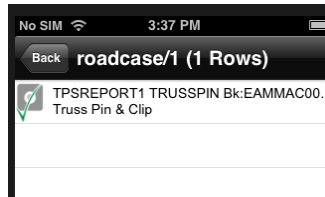
- I. Select Unpack Roadcase mode using the main menu.
- II. Scan a roadcase barcode.
- III. Scan all assets that are to be unpacked from this roadcase.

4.5 Steps to see what is currently packed in a roadcase or rack:

- I. Scan the roadcase or rack barcode from the Asset Inquiry mode.
- II. Tap the item to enter into the details view, then click View Details.
- III. The screen will show the title as the barcode of the roadcase, and each item on the screen below that is some asset-tracked or non-tracked-barcode quantity of items inside.

Example:





4.6 Steps for Doing Asset Inquiries



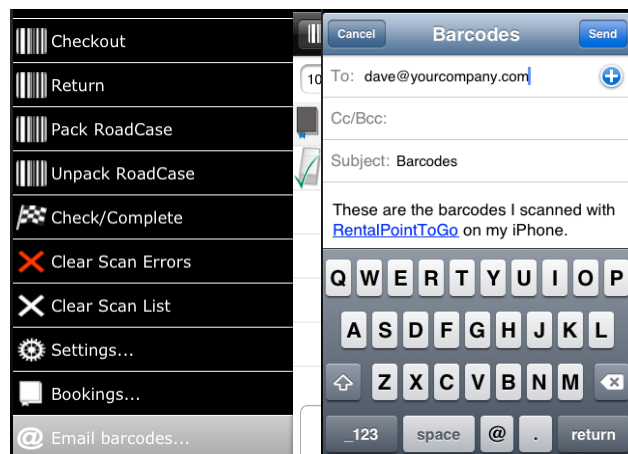
Select Verify Asset mode from the main menu:

This is a general “test” mode. If you want to know if your database and your actual product barcodes match up, this is a good initial mode to use.

- I. Scan item.
- II. Verify that the actual item and the description in the database match.
- III. Where assets are not yet in the database, you can use the email feature to send the list of “not found” barcodes to yourself via email for input into the main program.

4.7 Sending an Email

To send an email, scan some barcodes then tap “Email Barcodes”. Type any text you want to add to the



standard email then click Send:

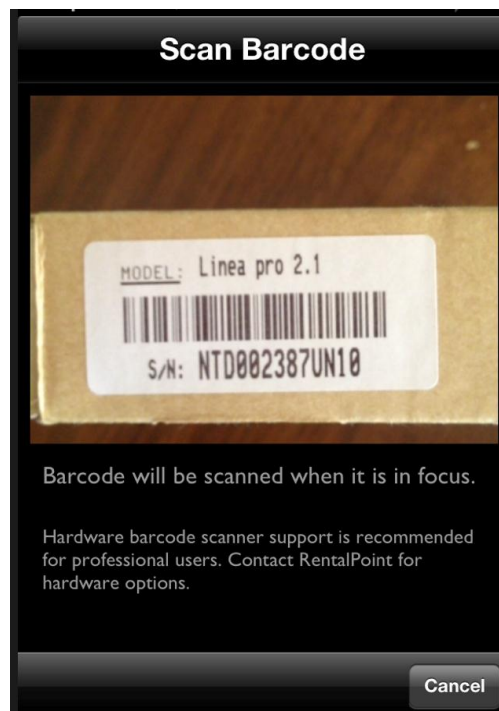
4.8 Using the Camera Based Scanner

You can use the app without hardware barcode scanning, if you enable the camera scanning mode in the settings.

Scan Hardware Options

Tap to enable camera

Unlike the hardware scanner, the scan button on the main page takes you to a new



page where you can use your built in camera to acquire a barcode. This scan window is momentary and closes automatically if it succeeds in acquiring a barcode:

Some experimentation may be required in order to determine the correct distance that you should hold your device away from the barcodes you wish to scan. A clear in-focus image with a high contrast between the barcode (black) and its background color (usually white) is required, and even diffuse indoor lighting works best.

RentalPoint does not recommend you use the camera barcode mode for anything too serious, and recommends you check out the hardware barcode scanning options if you are serious about doing barcode based inventory work on a handheld device.