

# RentalPoint Initial Setup

Last Modified on 15/05/2026 1:48 pm EDT

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*Once the installation is complete you'll want to prepare the software for first use by entering the initial data you require, such as operators, tax authorities, freight option etc...*

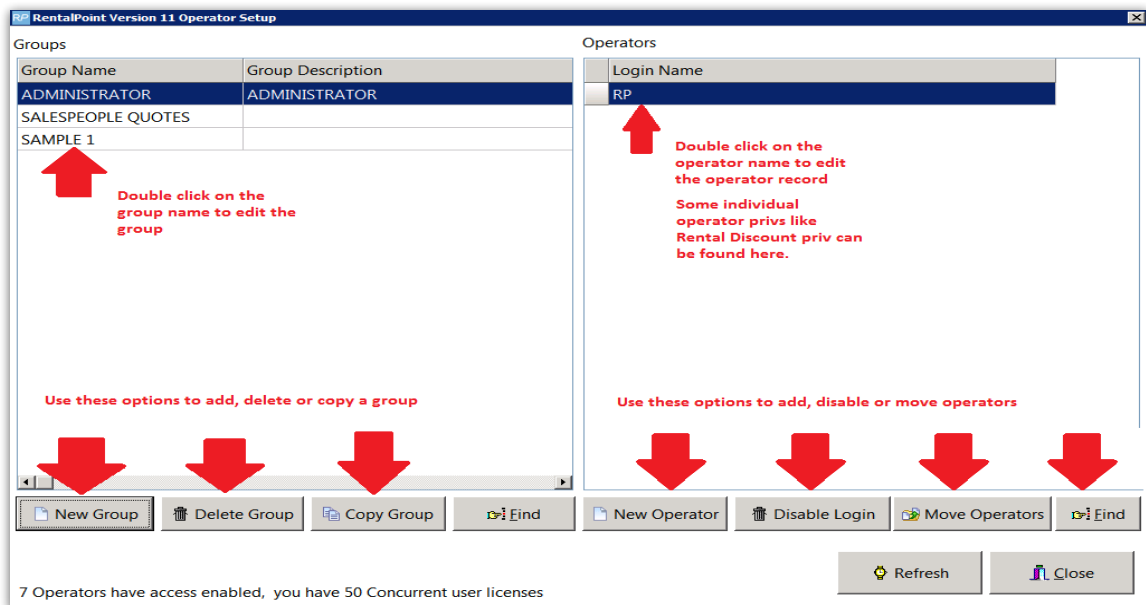
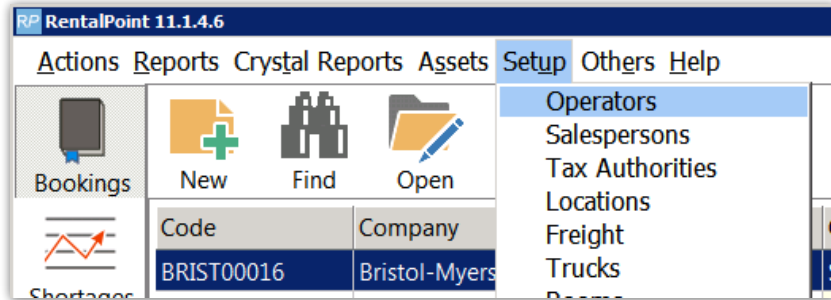
*Below are the items that you'll need to set up before you start entering orders, click on the links to view detailed instruction for each item.*

## Operator & Operator Groups

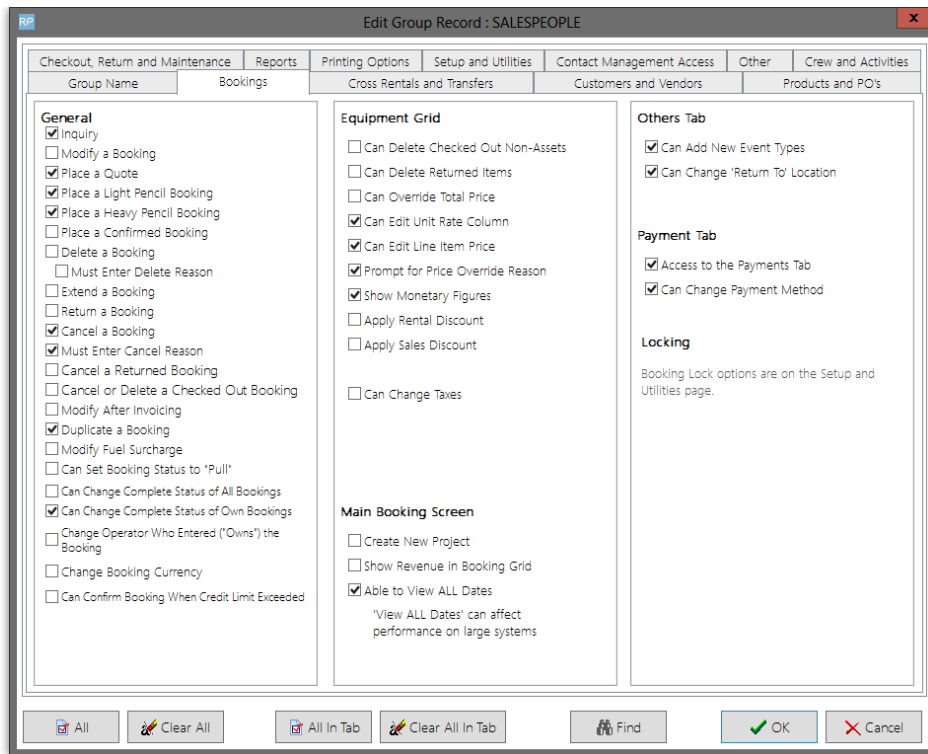
Operator or user permissions within RentalPoint are managed via "Operator Groups". Simply create a group, grant access permissions for use of different RentalPoint features to the group, and add operators to the group. Group permissions apply to all operators within the group. You'll need to enter an operator for each person you want to track in the system (though you may want a general log-in for a shop computer for instance that will be used by several people).

## Managing Operator Groups

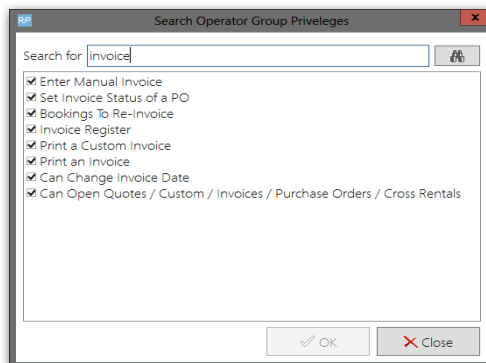
- To access operator setup go to **Setup** and click **Operators**.



- Grant rights to the group by ticking the boxes in the appropriate tabs. Click **OK** to save your changes.



- If you can't find the privilege you're looking for, try the **Find** option. Type the privilege that you're looking for and hit enter. A list of related operator privileges displays. Tick the box beside the privilege you need and click **OK**.



## Create/Edit Operators

Now that you have created operator groups you can add operators to the groups. Click 'New Operator'

RP RentalPoint Version 11 Operator Setup

| Groups             |                   | Operators  |  |
|--------------------|-------------------|------------|--|
| Group Name         | Group Description | Login Name |  |
| ADMINISTRATOR      | ADMINISTRATOR     | RP         |  |
| SALESPeOPLE QUOTES |                   | SELL2      |  |
| SAMPLE 1           |                   |            |  |

8 Operators have access enabled, you have 9 Concurrent user licenses

For each operator, you must specify a first and last name as well as user name and password so he or she may log into RentalPoint. You also must add the user to a group so he or she can have rights inherent to that group, throughout the system. As a default, the operator does not have access to anything.

Operator setup allows you to give an operator a default region and location. When he or she logs in, the main scope of RentalPoint is set to his or her default scope. Whether the operator is creating a booking or PO, viewing the schedule, or browsing the product tree, his or her scope is set to the default defined in the operator properties. You may edit these details later by highlighting the operator and clicking Properties.

Use Disable Login to deny login rights to RentalPoint. Please note, once you have created an operator you cannot delete it, only disable it. This is for tracking purposes since a specific operator is linked to a booking.

RP Add a New Operator

Operator Settings Multi Location Operator Groups

GROUP : ADMINISTRATOR

First Name

Last Name

Group (default) ADMINISTRATOR

Login Name RP

Password RP

Must assign booking to PO before saving

Maximum PO Approval Amount 1,000,000.00

Maximum Cross Rental Approval Amount 1,000,000.00

Maximum Rental Discount % 50.000000

Maximum Sales Discount % 100.000000

Booking Product Treeview Options

- Open While Adding and Editing
- Always Open
- Closed until user opens it

Default Location 0 - Toronto [Sa]

Default Division 0 - Zero

Default Salesperson MYTEST [i] [X]

Default Project Manager [i] [X]

Email settings Use Custom Email Settings

Email Address rentp.mandy@gmail.com

SMTP Address(Host) smtp.gmail.com

SMTP Port 465 SSL/TLS SSL

My smtp server requires authentication

Send Test Email

Clear Stored Password

Copy from Company Email Settings

Copy from Location Email Settings

System Administrator

Disable Login

OK Cancel

## Change Operator Password and defaults

Operators can change their password by using the utility in the Others main menu. Select Others, then Operator Options, then Change Password and Operator Defaults. Enter your old password, then enter the new password and save. You must restart RentalPoint for the password and setting changes to take effect

Administrators can control this utility by setting access rights in the Setup and Utilities tab of the operator privileges.

RP RentalPoint

Actions Reports Crystal Reports Assets Setup Others Help

Bookings New Find Open View

Shortages

Customers

Products

| Code          | Company                        | Time  | In  | Date       | Time  | Booking Type               |
|---------------|--------------------------------|-------|-----|------------|-------|----------------------------|
| MYTEST00018   | mytest                         | 13:47 | Thu | 2017-02-16 | 13:47 | Rental                     |
| MYTEST00025   | mytest                         | 12:00 | Mon | 2017-02-20 | 12:00 | Rental                     |
| MYTEST00029   | mytest                         | 12:01 | Tue | 2017-02-28 | 12:00 | Rental Extended From : 000 |
| MYTEST00027   | mytest                         | 12:00 |     |            |       | Sale                       |
| MYTEST00028   | mytest                         |       |     |            |       |                            |
| CHESABAR00030 | Chesapeake Bar Association Inc |       | Fri | 2017-03-03 | 08:00 |                            |
| MYTEST00024   | mytest                         |       | Fri | 2017-04-21 | 10:00 |                            |
| BCUST00001    | B Company                      |       | Tue | 2017-04-25 | 08:00 |                            |

Print Cycle billed

Import / Export

Display Log Files

Archiving

Utilities

Change Operator Ctrl+F3

View Current Operators

Operator Reports

Open a Second Copy Ctrl+Alt+O

Operator Options

Turn off Outlook Security Message

Automatic Column Resizing

Directory for Carbon Copy Documents

Change Password and Operator Defaults

RP Edit Operator Record : RP

Operator Settings Multi Location Operator Groups

First Name

Last Name

Login Name

Enter Old Password

Enter New Password

Default Location  [Satellit...

Default Division

Default Salesperson

Default Project Manager

Email settings

Email Address

SMTP Address(Host)

SMTP Port  SSL/TLS

My smtp server requires authentication

Booking Product Treeview Options

Open While Adding and Editing

Always Open

Closed until user opens it

## Operator Listing and Other Reports

This is a simple report that prints an alphabetical listing of operators and the group that they are assigned to.

To run this report select the Operator Listing Report from the others main menu.

RP

Actions Reports Crystal Reports Assets Setup Others Help

Bookings New Find Open Vi

Shortages

Customers

| Code        | Company | Time In | Date           | Time  | Booking Ty |
|-------------|---------|---------|----------------|-------|------------|
| MYTEST00018 | mytest  | 13:47   | Thu 2017-02-16 | 13:47 | Rental     |
| MYTEST00025 | mytest  | 12:00   | Mon 2017-02-20 | 12:00 | Rental     |
| MYTEST00029 | mytest  |         |                |       |            |
| MYTEST00027 | mytest  |         |                |       |            |
| MYTEST00028 | mytest  |         |                |       |            |

Print Cycle billed

Import / Export

Display Log Files

Archiving

Utilities

Change Operator Ctrl+F3

View Current Operators

Operator Reports

Operator Listing Report

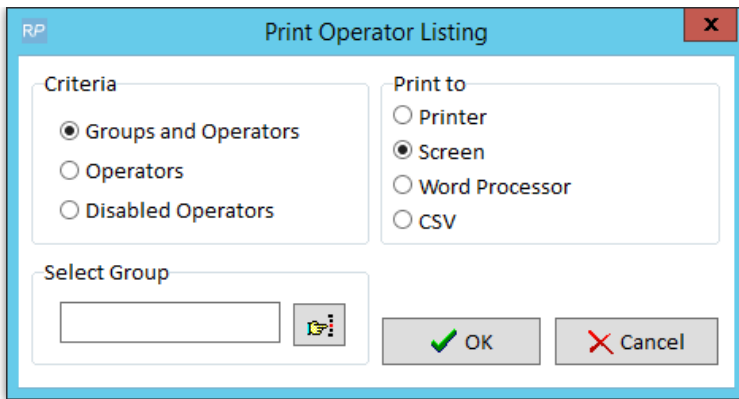
Operator Group Privileges

Audit Trail General

Open a Second Copy Ctrl+Alt+O

Operator Options

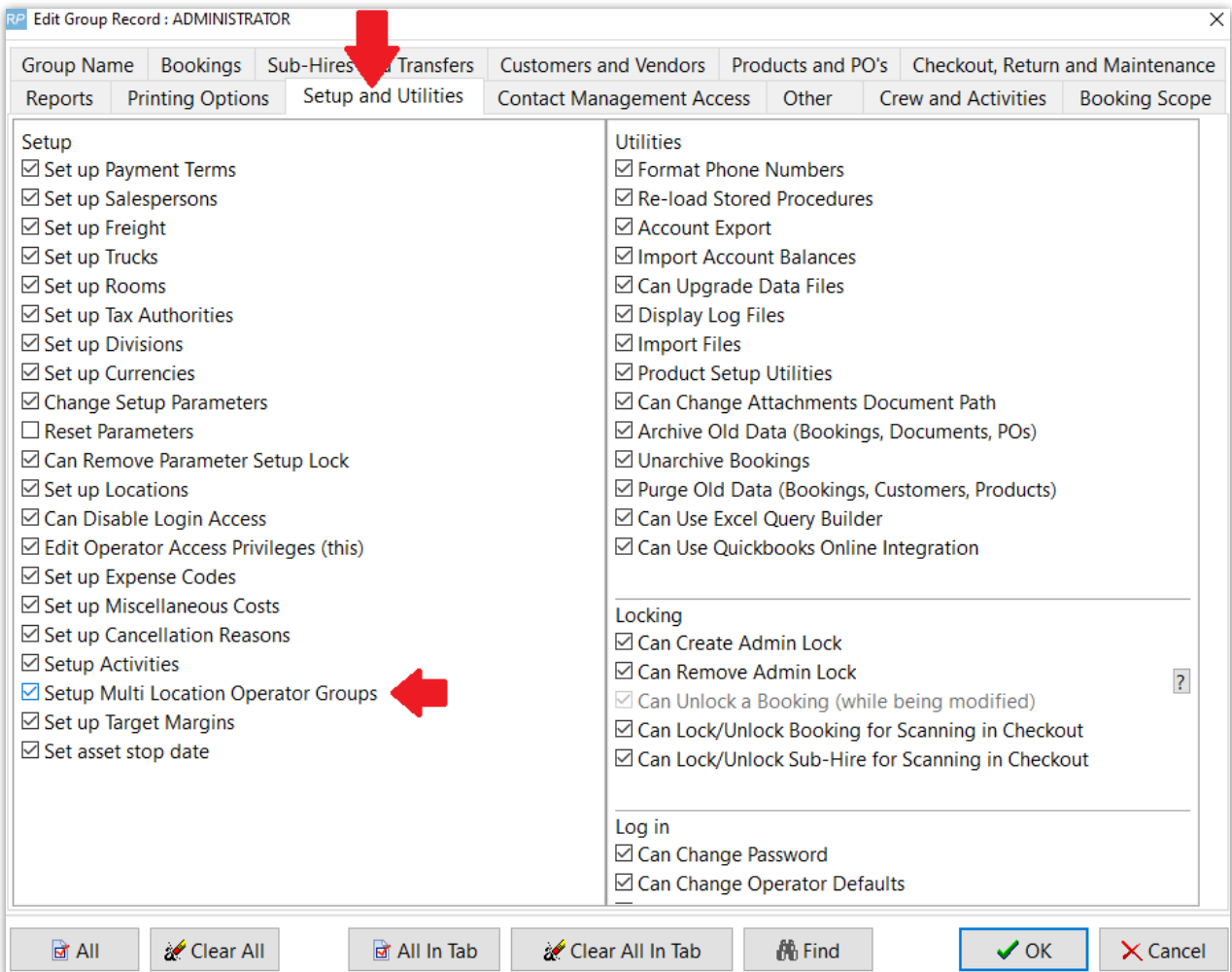
Once selected, specify scopes and click OK.



## Multi-Location Security

When using the multi-location module, RentalPoint offers the ability to assign different access rights for the SAME operator at each location.

You'll need 'Setup Multi Location Operator Groups' privilege to use this functionality.



**RentalPoint Version 11 Operator Setup**

| Groups             |                   | Operators  |
|--------------------|-------------------|------------|
| Group Name         | Group Description | Login Name |
| ADMINISTRATOR      | ADMINISTRATOR     | RP         |
| SALESPeOPLE QUOTES |                   |            |
| SAMPLE 1           |                   |            |

**FIRST....Set up your Operator Groups as normal**

**THEN...Double click on the operator you want to manage permissions for**

**Edit Operator Record : RP**

Operator Settings: **Multi Location Operator Groups**

| Location   | Group              |
|------------|--------------------|
| Toronto    | ADMINISTRATOR      |
| New York   | ADMINISTRATOR      |
| Florida    | ADMINISTRATOR      |
| California | ADMINISTRATOR      |
| Texas      | SAMPLE 1           |
| London     | SALESPeOPLE QUOTES |

**For multi-location systems only, you will see an extra tab**

**Click the right hand corner of the box to get the drop down list of groups available**

When using RentalPoint, Operator privileges will be applied on a location basis entirely dependent upon the location the user has selected.

**RentalPoint 11.1.4.6**

Actions Reports Crystal Reports Assets Setup Others Help

Bookings New Find Open View Work Admin Financials Print Refresh

| Code              | Company                                   | Out | Date       | Time  | In  | Date       | Time  | Stat | Invoice No. | Prog |
|-------------------|---|-----|------------|-------|-----|------------|-------|------|-------------|------|
| BRIST00016        | Bristol-Myers Squibb                      | Sun | 26/04/2015 | 10:00 | Tue | 28/04/2015 | 14:11 | ON   |             |      |
| <b>BRIST00011</b> | Bristol-Myers Squibb                      | Tue | 28/04/2015 | 08:00 | Wed | 29/04/2015 | 09:00 | BP   | 63          | Conf |
| FISK00008         | Fisker Automotive Corporate Office & Head | Tue | 05/05/2015 | 15:50 | Thu | 07/05/2015 | 10:00 | ON   |             | Conf |
| FREE00008         | Freescale Semiconductor Inc               | Wed | 06/05/2015 | 10:00 | Thu | 07/05/2015 | 10:00 | BY   | 67          | Conf |
| FREE00009         | Freescale Semiconductor Inc               | Mon | 11/05/2015 | 10:00 | Fri | 15/05/2015 | 16:47 | ON   |             | Conf |
| FISK00010         | Fisker Automotive Corporate Office & Head | Wed | 20/05/2015 | 10:00 | Wed | 20/05/2015 | 10:00 | BN   |             | Conf |
| CANTOR00013       | Cantor Fitzgerald, L.P.                   | Thu | 11/06/2015 | 10:00 | Fri | 12/06/2015 | 10:00 | BY   | 70          | Conf |
| CHESABAR00031     | Chesapeake Bar Association Inc            | Fri | 26/06/2015 | 09:00 | Tue | 30/06/2015 | 18:00 | BN   |             | Conf |
| CHESABAR00032     | Chesapeake Bar Association Inc            | Sat | 27/06/2015 | 09:00 | Mon | 29/06/2015 | 18:00 | BN   |             | Conf |
| CHESABAR00033     | Chesapeake Bar Association Inc            | Mon | 29/06/2015 | 09:00 | Tue | 30/06/2015 | 18:00 | BN   |             | Conf |
| MOMA100012        | Museum of Modern Art                      | Mon | 29/06/2015 | 09:00 | Tue | 30/06/2015 |       |      |             | Conf |
| GOLDMAN00004      | Goldman, Sachs & Co.                      | Wed | 12/08/2015 | 08:00 | Sun | 16/08/2015 |       |      |             | Conf |

Sequence: Out Date and Time Find [Delivery Date]

Scope:
  Quotes  Rentals  Booked  Choose your location  All d...
  Light Pencil  Sales  Pull  Ju...
  Heavy Pencil  Sub hire  Out  Days
  Confirmed  Open hire  Returned  Complete  Assigned
  Cancelled  Transfers  Data to View:  Current  Archive

Location: 0 - Toronto, 1 - New York, 2 - Florida, 3 - California, 4 - Texas, 5 - London, 6 - Toronto Ritz Carlton, 7 - Toronto Hilton, 8 - NY Courtyard Newark Downto...

Filter on this Location

All Operator: Rp Salesperson Project Manager Location: 0 - Toronto

# Freight

Freight can be recorded against a booking

- Manually on the booking equipment tab
- Using predefined freight on the booking freight tab. Using this option freight is set up outside the booking (usually during initial data setup) and selected on the freight tab during booking entry.

**Pricing Parameter #24** defines how freight is entered on the booking

- Single Freight Charge

|               |        |
|---------------|--------|
| Total Hire    | 298.89 |
| Del/pickup    | 108.00 |
| Inst/Operator | 600.00 |

- Delivery, Collection, Fuel Surcharge (fuel surcharge is across all bookings and is entered when setting the parameter)

|               |        |                       |      |           |
|---------------|--------|-----------------------|------|-----------|
| Total Hire    | 298.89 | Hire discount @ rate  | 0.00 | 0.00000 % |
| Del/pickup    | 54.00  | Fuel Surcharge @ rate | 0.00 | 0.00 %    |
| Collection    | 54.00  |                       |      |           |
| Inst/Operator | 600.00 |                       |      |           |

- Also 'Allow Manual Entry of Freight' preference is set here.

## Manual Freight Entry

When activated, users can choose to manually enter freight on the Equipment Tab of a booking (per screenshot below). It's important to note that the freight tab is still available and any freight entered under the freight tab of the booking will supersede manual freight entry. This freight cost makes up part of the booking total price.

To activate this option set 'Allow Manual Entry of Freight = YES' in Pricing Parameter #24

The screenshot shows the 'Modify booking' window with the following data:

| Code | Description                 | Quantity | Avail   | Short | *Cross rental | Prep Qty | Quick T/A | Unit Rate | Days | %disc | Price  | Stat | C | W |
|------|-----------------------------|----------|---------|-------|---------------|----------|-----------|-----------|------|-------|--------|------|---|---|
| MONR | Monitor rack                | 1        | 1       | 0     | 0             | 0        |           | 175.00    | 1.00 | 0.00  | 175.00 | Sng  |   |   |
| BENQ | Benq widescreen             | 2        | In Rack |       | 0             | 0        |           | 175.00    | 1.00 | 0.00  | 350.00 | prt  |   |   |
| WCTL | Wireless Camera Tally Light | 1        | 2       | 0     | 0             | 0        |           | 123.89    | 1.00 | 0.00  | 123.89 | Sng  |   |   |

Summary section values:

- Total Hire: 298.89
- Del/pickup: 100.00
- Collection: 100.00
- Inst/Operator: 600.00
- Hire discount @ rate: 0.00 (0.00000%)
- Fuel Surcharge @ rate: 0.00 (0.00%)
- Damage waiver: 0.00
- Event Management @ Rate: 0.00 (0.00%)
- Actual Cross rental: 0.00
- Sub total: 1,098.89
- Exempt: 0.00
- GST: 81.93
- Total Price: 1,180.82 CAD

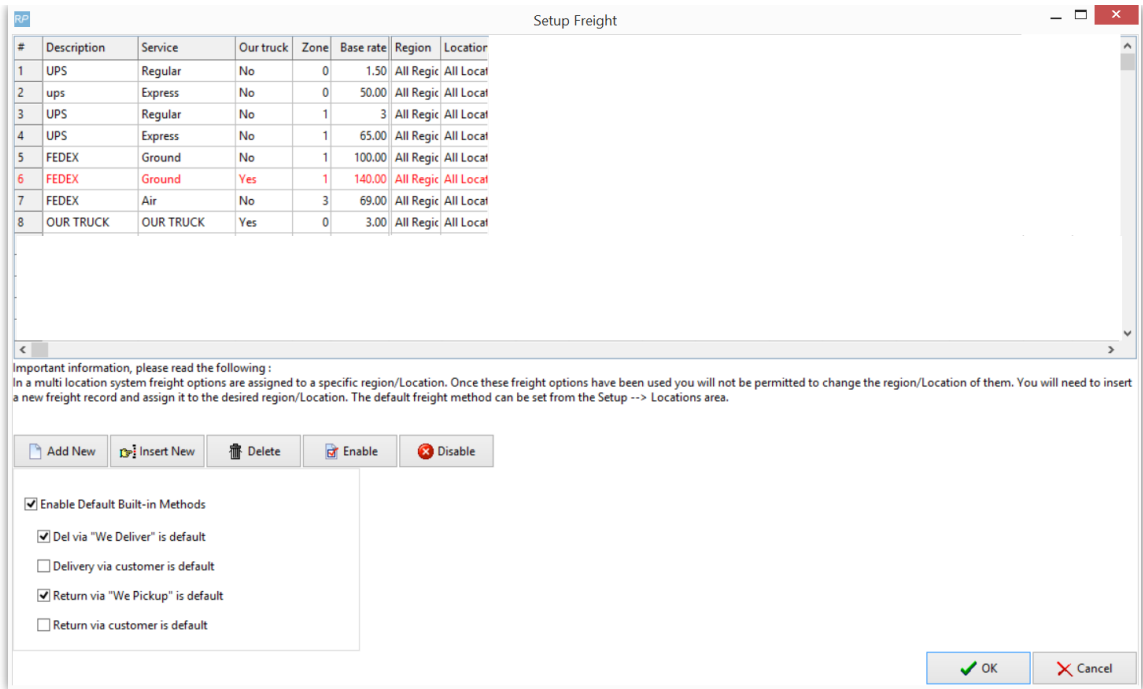
## Predefined Freight - The Display Window

The screenshot shows the 'Setup' menu with the following options:

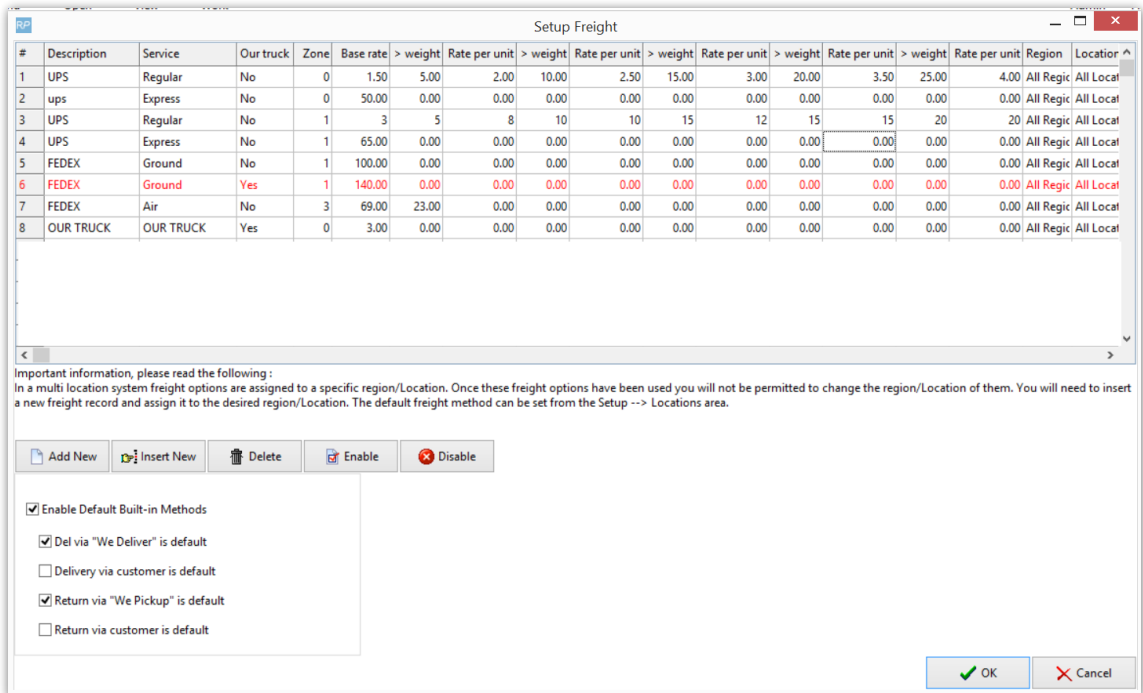
- Operators
- Salespersons
- Tax Authorities
- Regions
- Locations
- Freight
- Trucks

The freight setup window displays differently based on parameter settings.

- When **Pricing Parameter #24** is set to Single Freight Charge
  - One charge for freight will be entered on the booking
  - The freight window displays as below
  - Region and Location fields display for multi-location systems only.



- When **Pricing Parameter #24** is set to 'Delivery, Collection and Fuel Surcharge' *AND* 'Allow Manual Entry of Freight' is set to NO
  - The freight window displays as below.
  - Here shipping costs are calculated using the base rate up to a specified weight, however for freight greater than the defined weight a higher charge can be applied using the Rate per unit entered against each weight threshold.
  - Region and Location fields display for multi-location systems only.



## Predefined Freight- Service, Our Truck, Zones

The Freight Setup window allows for configuration of multiple freight options for pickups and deliveries.

- Service is used to describe the type of service offered by the Freight description
- Our Truck is used to identify deliveries and returns that need to be tracked by the software in the Delivery & Return window
- Zones are used to denote distance to travel, so that the same service can be used to charge different rates for differing distances.

Below both a 'Regular' and an 'Express' service are set up for freight description UPS.

Each service covers two zones charged at different Base Rates and escalating rates per unit

Bookings using this freight option will not display in the Delivery and Return window since we don't need to track this freight in-house.

| # | Description | Service   | Our truck | Zone | Base rate | > weight | Rate per unit | > weight | Rate per unit | > weight | Rate per unit | > weight | Rate per unit | > weight | Rate per unit | Region    | Locator   |
|---|-------------|-----------|-----------|------|-----------|----------|---------------|----------|---------------|----------|---------------|----------|---------------|----------|---------------|-----------|-----------|
| 1 | UPS         | Regular   | No        | 0    | 1.50      | 5.00     | 2.00          | 10.00    | 2.50          | 15.00    | 3.00          | 20.00    | 3.50          | 25.00    | 4.00          | All Regic | All Locat |
| 2 | ups         | Express   | No        | 0    | 50.00     | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | All Regic | All Locat |
| 3 | UPS         | Regular   | No        | 1    | 3         | 5        | 8             | 10       | 10            | 15       | 12            | 15       | 15            | 20       | 20            | All Regic | All Locat |
| 4 | UPS         | Express   | No        | 1    | 65.00     | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | All Regic | All Locat |
| 5 | FEDEX       | Ground    | No        | 1    | 100.00    | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | All Regic | All Locat |
| 6 | FEDEX       | Ground    | Yes       | 1    | 140.00    | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | All Regic | All Locat |
| 7 | FEDEX       | Air       | No        | 3    | 69.00     | 23.00    | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | All Regic | All Locat |
| 8 | OUR TRUCK   | OUR TRUCK | Yes       | 0    | 3.00      | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | 0.00     | 0.00          | All Regic | All Locat |

## Predefined Freight - Rate Calculations

- **Base Rate**

Used to calculate the freight charge up to the maximum weight entered.

Example:

A Base Rate of 7.5 with a Maximum Weight of 10Kg results in a freight charge of \$75

- **Rate Per Unit (RPU)**

Applies an additional charge for each unit above the maximum weight threshold, up to the next configured weight range.

Using weight thresholds together with multiple freight services provides considerable flexibility when calculating freight charges.

## Predefined Freight - Default Built in Methods

Default freight settings can also be configured. These defaults are automatically applied whenever a new booking is created.

Please note: once a Freight item has been created, it can be renamed but cannot be deleted.

RP Setup Freight

| #  | Description     | Service         | Our truc | Zone | ase rate | Location      |
|----|-----------------|-----------------|----------|------|----------|---------------|
| 1  | UPS             | Air Next Day    | No       | 0    | 0.00     | All Locations |
| 2  | Irish Air       | Road            | No       | 0    | 0.00     | All Locations |
| 3  | English Air     | Air             | No       | 0    | 0.00     | All Locations |
| 4  | Box Truck       | Road            | Yes      | 0    | 75.00    | All Locations |
| 5  | Van             | Road            | Yes      | 0    | 25.00    | All Locations |
| 6  | Van             | Rail            | No       | 0    | 0.00     | All Locations |
| 7  | The Customer    | UPS             | No       | 0    | 0.00     | All Locations |
| 8  | The Customer    | Truck           | No       | 0    | 0.00     | All Locations |
| 9  | MYTEST          | Testing the ler | No       | 0    | 0.00     | All Locations |
| 10 | abcdefghijklmno | test            | No       | 0    | 0.00     | All Locations |
| 11 | The Customer    | Rail            | No       | 0    | 0.00     | All Locations |


Important information, please read the following :  
 In a multi location system freight options are assigned to a specific Location. Once these freight options have been used you will not be permitted to change the Location of them. You will need to insert a new freight record and assign it to the desired Location. The default freight method can be set from the Setup --> Locations area.

Enable Default Built-in Methods  
 Del via "We Deliver" is default  
 Delivery via customer is default  
 Return via "We Pickup" is default  
 Return via customer is default

Once Freight options have been added to the system, they can be selected from the Venue tab within a booking. Based on the selected delivery and return freight options, the Venue tab will automatically calculate the applicable freight charges.


The calculated freight charge is then automatically updated on the Equipment tab, ensuring the booking reflects the correct delivery and return costs associated with the selected freight services.


RP Modify booking

Out 03/28/18 0900 In 03/29/18 1800 MYTEST00069 Location  Toronto

Customer | Calendar | Equipment | Crew | Venue | Notes | Payments | Attachments | Other Details | Status


---

Delivery via  UPS Service Air Next Day Zone 0  Our number  Their number Total Weight 43.42560 lbs

Return via  Customer Service Zone 0  Our number  Their number Total Volume 34.15260 Cubic feet

Insurance Value 2,451.00

Installation Instructions



Room | Freight | Floorplan

## Predefined Freight on the Booking

Now that freight has been set up it can be used in bookings. If you haven't done so already, log out and back in again to see the latest freight setup.

When freight is selected on a booking, the software intelligently groups the related options together offering one freight option for matching descriptions with differing service and zone options for that description. This setup provides flexibility for operators to manage different freight scenarios, including:

- Charging based on varying travel distances
- Applying preferred freight rates for selected customers
- Offering different shipping priorities and service levels

For our example, UPS will appear once in the list with options under 'Service' for Regular and

Express and options under 'Zone' for 0 and 1

Our number/Their number is simply a toggle showing who is paying for freight.

- Our number: the freight cost is added to the booking
- Their number: the freight cost is noted on the booking but **NOT** added to the final quote since it will be paid by the client

Out 26/05/12 0800 In 26/05/12 1700 SHAW88900025 Region 0 - EAST Location 0 - Toronto

Customer Calendar Equipment Crew Venue Notes Payments Attac

Delivery via Service Zone  Our number  Their number Total Weight 20.00000 lbs

ups Regular 0

Return via Service Zone  Our number  Their number Total Volume 0.00000 Cubic feet

ups Regular 0

Calculated Delivery Charge (Freight Setup) 54.00

Calculated Collection Charge (Freight Setup) 54.00

Insurance Value 0.00

Apply to booking

When freight is entered or modified click 'Apply to booking' so that the latest freight is visible on the Equipment tab.

From the Equipment tab you can also click the blue refresh arrow to reload freight from the freight tab

Modify booking

Out 26/05/12 0800 In 26/05/12 1700 SHAW88900025 Region 0 - EAST Location 0 - Toronto

Customer Calendar Equipment Crew Venue Payments Attachments Other Details Status Follow up

| Code | Description                 | Quantity | Avail   | Short | *Cross rental | Prep Qty | Quick T/A | Unit Rate | Days | %disc | Price  | Stat | C | W |
|------|-----------------------------|----------|---------|-------|---------------|----------|-----------|-----------|------|-------|--------|------|---|---|
| MONR | Monitor rack                | 1        | 1       | 0     | 0             | 0        | 0         | 175.00    | 1.00 | 0.00  | 175.00 | Sng  | ✓ | ✓ |
| BENQ | Benq widescreen             | 2        | In Rack | 0     | 0             | 0        | 0         | 175.00    | 1.00 | 0.00  | 350.00 | prt  | ✓ | ✓ |
| WCTL | Wireless Camera Tally Light | 1        | 2       | 0     | 0             | 0        | 0         | 123.89    | 1.00 | 0.00  | 123.89 | Sng  | ✓ | ✓ |
| WCT  | Wireless Camera Transmitter | 1        | 9       | 0     | 0             | 0        | 0         | 0.00      | 1.00 | 0.00  | 0.00   | prt  | ✓ | ✓ |
| CDO  | Camera dolly                | 1        | 11      | 0     | 0             | 0        | 0         | 0.00      | 1.00 | 0.00  | 0.00   | prt  | ✓ | ✓ |

Total Hire 298.89

Del/pickup 108.00

Inst/Operator 600.00

Hire discount @ rate 0.00 0.00000 %

Event Management @ Rate 0.00 0.00 %

Actual Cross rental 0.00

Sub total 1,006.89

Exempt 0.00

GST 74.57

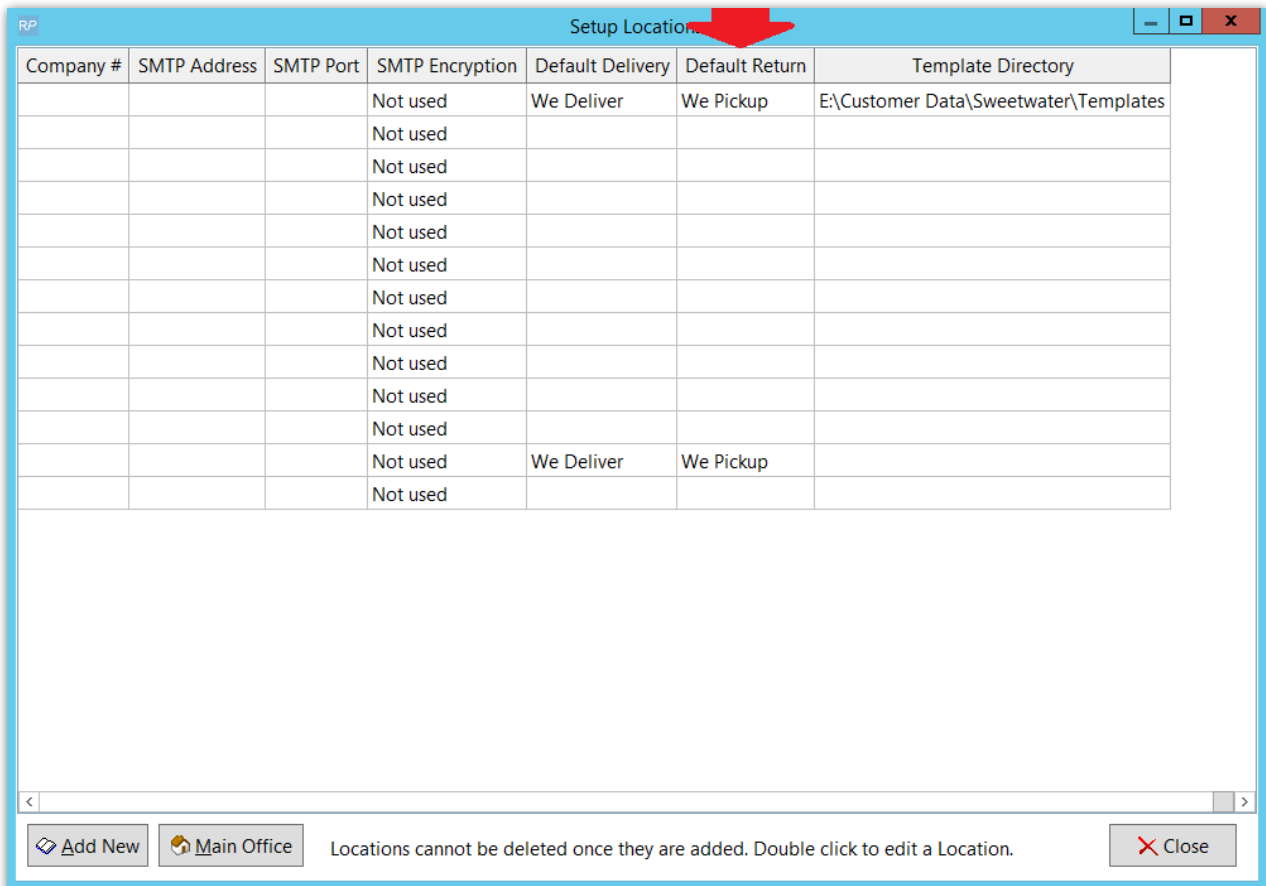
Total Price 1,081.46 CAD

## Multi Location Freight

When using the multi-location module, an additional **Location** column will appear in the Freight Setup window allowing the freight option to be assigned either to all locations or to a specific location.

To configure Freight defaults for each location, navigate to **Setup → Locations**. On the far-right side of the Locations grid, you'll find the default settings for both **Delivery** and **Return** Freight options.

Note: When creating a booking, PO, cross rental or transfer, the freight options will display based on the location selected.



| Company # | SMTP Address | SMTP Port | SMTP Encryption | Default Delivery | Default Return | Template Directory                    |
|-----------|--------------|-----------|-----------------|------------------|----------------|---------------------------------------|
|           |              |           | Not used        | We Deliver       | We Pickup      | E:\Customer Data\Sweetwater\Templates |
|           |              |           | Not used        |                  |                |                                       |
|           |              |           | Not used        |                  |                |                                       |
|           |              |           | Not used        |                  |                |                                       |
|           |              |           | Not used        |                  |                |                                       |
|           |              |           | Not used        |                  |                |                                       |
|           |              |           | Not used        |                  |                |                                       |
|           |              |           | Not used        |                  |                |                                       |
|           |              |           | Not used        |                  |                |                                       |
|           |              |           | Not used        |                  |                |                                       |
|           |              |           | Not used        | We Deliver       | We Pickup      |                                       |
|           |              |           | Not used        |                  |                |                                       |

Add New Main Office
Locations cannot be deleted once they are added. Double click to edit a Location.
Close

## Tax Authorities

The Tax Authorities section of RentalPoint helps you maintain all the taxes used throughout the system. Please do not change the values of tax Exempt. If a customer is not charged tax, this is the only tax authority you can use.



## Regions Setup

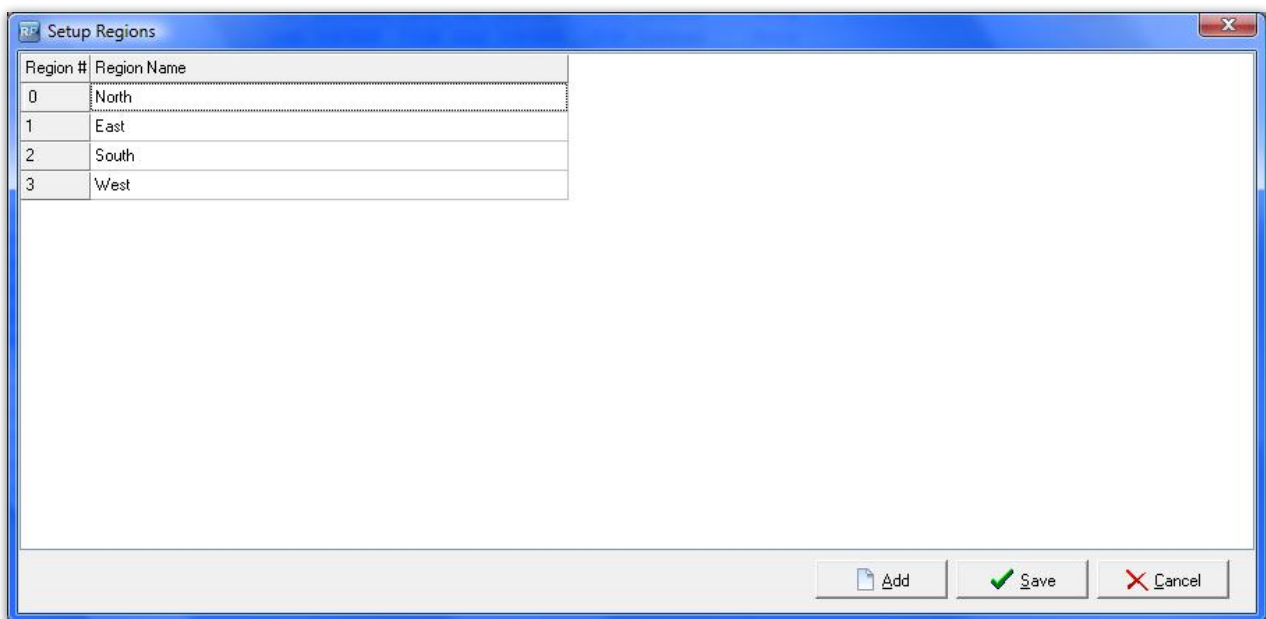
Used in conjunction with Locations, regions are used to group specific locations together. A company with 4 locations, 2 in Eastern Timezone and 2 Pacific Timezone, might create an Eastern and Pacific region, then slot the relevant locations under each region.

To use the regions functionality it must first be enabled. Go to the Parameters option of the setup menu. Open Operational #174 - Enable Region Support. Set this to Yes and restart RentalPoint.

Once you have restarted RentalPoint, the option for adding regions will be enabled. When RentalPoint is run again you will notice a region scope option at the bottom as well as a new option under the setup menu that allows you to configure regions.



To configure the regions, select the Regions option from the setup menu. By default the system will create a region for you, you can change the name to make it more descriptive. Once a Region has been added to the system it can be renamed but not deleted.



After entering Regions, go into Setup Locations and assign each of your locations to a Region.

Please note, once a Region has been created, you can rename it but not delete it. Bookings and other information in the system will still be linked to the region for reporting information.

### Scope and Searching

The secondary scope in RentalPoint can also be sorted by regions. If you select a region from the secondary scope, any bookings that are assigned to that region, or to the locations in that region, are displayed. The secondary scope applies to other areas of RentalPoint, including the Shortages List, Products, and Purchase Orders.

When creating a booking, you can select a region from the list. Only the locations associated with that region display in the location drop down list.

### Equipment Availability

Searching for equipment based on a region is quick and easy. Enabling Operational Parameter #127 - Equipment Search Location Sensitive displays an extra search tab in the

equipment grid of the booking. Select the region, then continue entering your equipment as normal. Availability is based on location but the tree view and the search are based on the quantities in the region.

### **Technicians**

When entering a technician, the region in which they work can be specified. Then when a booking is created only those technicians that work in the region specified in the booking can be selected.

### **Custom Printing**

When printing custom templates throughout the system, you can specify region specific templates. For example, your Eastern region may have different printouts than your Western region. Using the custom printing option, you can easily organize your templates, so the Eastern region does not accidentally use a Western region template.

### **Reports**

Several reports in the system, such as the Booking Cross Section, Invoice Register and Revenue Report can be sorted by regions, making accounting duties much more simplified.