# **Service Point** 50<sup>2</sup> Using ServicePoint for Reservations and "Quantity Rentals"

ServicePoint is the next generation of service management software from RTM Computer Solutions. Our software takes full advantage of Microsoft SQL technology to bring you a reliable, robust service management solution that will help productively manage and simplify all facets of your service, support, and repair business. Using the ServicePoint setup options in a certain way allows for ServicePoint to be an effective tool for doing rentals. Setting up the software in this fashion will help any business with a need to loan out or rent goods or equipment. This document has been created to as a supplemental guide to our standard "Rentals" document to describe the setup and processing of reservations and rentals of *quantities* of items. Quantity rentals can also be used for reservations of limited resources, such as classes, trips, etc with limited participant availability.

## Introduction

There are several types of rentals that can be performed using ServicePoint, as described in our earlier whitepaper entitled "Using ServicePoint for rentals". These include *hourly usage*, *short-term* rentals, and *long term* rentals (with recurring periodic billing). Generally, the uses described in the prior document are for lower volume, higher value items such as audio/video equipment, construction/survey equipment, temporary building structures, etc.

A unique need also exists to track higher volume, bulk rental items such as tables, chairs, party supplies, etc. A common trait of these rentals is that a *quantity* of the item is rented, with a need to pre-reserve the amount for a given time-frame. A universal requirement is that a limited number of the rental resource exists. The operator must be able to see what quantities are available for a given calendar period, and to be able to assess the impact of a particular rental/reservation on the availability of existing resources during that time frame. We have developed some features and practices to support the needs of these businesses. This method of setting up rentals is useful for bulk items, meeting rooms, classes, excursions, campsites, etc, where limited amounts of the resources are available. This document attempts to describe the quantities rental process in detail.

## **Rental Processing**

Some specific setup must be done in CounterPoint and ServicePoint to properly support the quantity rental process. The technical aspects of the setup are covered in detail later in this document. An explanation of the day-to-day processing follows.

The CounterPoint Point of Sale system allows extensive customization of the interface by the user. Below is an illustration of some distinctive features added to the POS touchscreen to help support rentals. Most notably, a grid column is added called "Days/Weeks", and a custom button captioned "Rental Calendar" defined. We have also included the ticket "Reference" as a displayed column for the ticket lines. (By default, we will put the expected return date into the CP document line reference.) The captions of these can be customized by the user to more specifically suit their needs, if necessary.

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Pressing the "Rental Calendar" button will invoke the ServicePoint schedule screen. In the following screens, we have automatically filtered the lookup by a specific class of items. This is customizable by the user, and multiple rental calendars may be kept for different items types, events, or resources.

This screen shows the availability of a class of item, pre-filtered by certain criteria (in this case, based on user) to show "Chairs" and "Tables" offered for rent. A single type of item is selected by clicking on the appropriate line.

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Switching to a *month* view shows the currently committed rental quantities for the item. In the screen below, we are showing two separate rentals for tables, committing 69 of the available 122 tables on January 27. Each day in the monthly calendar shows the number reserved, followed by the remaining available quantity for that date.



When a customer requests the item for a specific timeframe, the user can quickly check the availability of sufficient quantity for the days needed. The below screen show the maximum number that can be reserved from January  $21^{st}$  through the  $24^{th}$  is 67, based on a pre-existing rental later in the week.

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Closing the calendar returns the user to the CounterPoint ticket entry screen, where the item to be rented is then selected. Item prompt codes are used to ask for specific information. Below, we have asked for the rental *start date*, and units to rent (*Days* or *Weeks*). There is also a comment field available for recording information pertaining to the rental. The prompts can be configured to use starting date and ending date, if the user prefers.

		lterr	n number	TABLES	<b>6</b> .	<u> </u>				
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The rental item "TABLES" has been set up to have a purchase price, as well as rental prices by "DAY" and "WEEK", using *alternate units* in CounterPoint. For demonstration purposes, we have selected to rent 15 tables at \$5.00 per day.

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Saving this line item into the CounterPoint ticket invokes a special pricing routine based on the selected rental unit price (days or weeks) and the rental term requested. In the below sample, the calculated price is \$20.00, or \$5.00 per day for 4 days. This multi-tiered pricing approach allows the true quantity rented to remain intact, while providing a clear indication of the requested time period.

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Other items may be added to the ticket, as in the following example where 120 chairs are also rented at a daily rate for the same time frame.

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The resulting ticket lines are shown in the following screenshot. The rental/reservation is saved, and a deposit or full payment can be optionally taken depending on the user's rental practices.

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lte n	em umber	Descripti	on	Qty	Days/ Weeks	Price	Line discount	Line item price	Reference				
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Saving the finalized ticket in CounterPoint automatically performs several steps, including updating of the ServicePoint scheduling calendar. As depicted below, the rental for 15 tables has been committed to the calendar for the  $21^{st}$  through the  $24^{th}$ .

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The overlap with a pre-existing rental of tables on the  $23^{rd}$  and  $24^{th}$  have resulted in a combined total of 70 rented and only 52 available for those days.

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A "weekly" view is available to show the rental schedule by customer, by day, for the entire week.

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A detailed view of the rental order is available in the ServicePoint scheduling screen, from which the user can obtain customer/contact information and access rental order notes. Mapping information is available to allow travel directions to be attached to a rental order.

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#### **Summary**

Through the use of specific setup and ServicePoint options, a rental item put onto a CounterPoint document can directly affect the reservation calendar in ServicePoint. Instant access to availability information based on capacity exists. Changing or deleting the document in CounterPoint will update the ServicePoint calendar, ensuring that up-to-date availability information is immediately accessible. The "Reference" field in each CounterPoint document line that has a rental period is updated with the expected rental return date.

## **Supporting Setup Instructions**

This section explains the specific setup that must be done in CounterPoint and ServicePoint to support the quantity rental process. Several things must be in place to obtain the full benefit of the interaction between CounterPoint and ServicePoint with regard to quantity rentals. What follows is a technical description of the setup process. It assumes that a working knowledge of CounterPoint, ServicePoint, and MS SQL Server is in place. A working copy of CounterPoint and ServicePoint must be installed and set up prior to the modifications for rentals.

#### **SQL Server Database**

• A new column is added to the IM\_PRC\_WORK table in the CounterPoint database. This allows the multi-tiered pricing to function properly. The following SQL statement should be executed using the proper CP database name.

alter table IM\_PRC\_WRK add PROMPT\_NO\_2 T\_USR\_DEF\_NO null go

- Our SQL script "Create\_USR\_RENTAL\_TERM\_PRICE\_trigger.sql" needs to be executed using the proper CP database name to insert the trigger "USR\_RENTAL\_TERM\_PRICE" into the IM\_PRC\_WORK table.
- The ServicePoint function "Maintain POS transfer trigger" should be run, under "Utility/Database maintenance", using our customized SQL files (ServicePoint\_USP\_INSERT\_WO\_FROM\_TKT.sql and Create\_CP\_DOC\_Trigger\_In\_CP.sql). This creates a customized trigger "TR\_CREATE\_SCHED\_WOS" in the table PC\_DOC\_AUDIT\_LOG and the stored procedures "USP\_DELETE\_WO\_FROM\_TKT" and "USP\_INSERT\_WO\_FROM\_TKT" into the ServicePoint database.

#### **CounterPoint Item Setup**

Items for rent should be set up using the following guidelines.

Items should be set up as "Non-inventory" item type. For our purposes, we have set up "Price-1" as the outright purchase price, to be used if an item is sold or if an item is damaged during rental (or the customer fails to return the item at the end of the rental term).

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Sub-category	PC
Account code 1	
Barcode Auto-Assign	
Primary vendor	
Vendgr's item #	
	>>
Inventory Prices Vendor Items	

Alternate units are set up to charge for specific rental periods. Using this method allows for different pricing levels for daily, weekly, monthly, etc. rates.

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Item number TABLES	Item type Non-Inventory
	Tracking method Normal
Description Rental tables	
Main Description Units Grid Barcodes Profiles Serialized Ecommerce Other	Substitute Items
DAY WEEK Alt-3 Alt-4 Alt-5	
Alt-1 Price-	1 5.00
Alt-1 unit DAY 🔎 Stocking ur	nit EACH
1 DAY I LACH Preferred ur	nit EACH 🗨
Alt-1 price-1 5.00	
Alt-1 regular price	
Alt-1 weight	
Alt-1 cube	
	<u>&gt;&gt;</u>
Inventory Prices Vendor Items	

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Item number TABLES 2 Auto-assign Item type Non-Inventory
Tracking method Normal
Description Rental tables
Main Description Units Grid Barcodes Profiles Serialized Ecommerce Other Substitute Items
DAY WEEK Alt-3 Alt-4 Alt-5
Alt-2 Price-1 5.00
Alt-2 unit WEEK
1 WEEK _ 7 EACH Preferred unit EACH
Alt-2 price-1 25.00
Alt-2 regular price
Alt-2 weight
Alt-2 cube
>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Inventory Prices Vendor Items

On the "Profiles" tab, we have used *Numeric profile 5* as the total number of rental units available. This number is used when determining the capacity available for reservation, including allowances for quantities already reserved.

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Item number TABLES	Auto-assign	Item type Non-Inventory
		Tracking method Normal
Des <u>c</u> ription Rental tables		
Main Description Units Grid Barcodes	Profiles Serialized Ecommerce Other Subs	iitute Items
Code profile <u>1</u>	Date profile 1 / /	<b>•</b>
Code profile 2	Date profile 2 / /	•
Code profile 3	Date profile 3 / /	<b>-</b>
Code profile 4	Date profile 4 / /	<b>v</b>
Code profile 5	Date profile 5 / /	•
Alpha p <u>r</u> ofile 1	Numeric profile 1	
Alpha pr <u>o</u> file 2	Numeric profile 2	
Alpha profile 3	Numeric profile 3	
Alpha profile 4	Numeric profile 4	
Alpha profile 5	Qty Owned 122.0000	
		·
		>>
Inventory Prices Vendor Items		

The "Other" tab in item setup is where the line entry prompts for *Start date, Length of rental,* and *comment* are defined. Setup of the individual prompt codes is covered in more detail below. Also in this tab, the *Prompt for unit* checkbox should be checked. This ensures that choice of alternate units is presented during ticket entry.

🔯 Items	
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Item number TABLES	Auto-assign Item type Non-Inventory
	Tracking method Normal
Des <u>c</u> ription Rental tables	
Main Description Units Grid Barcodes Profiles Serialized	Ecommerce Other Substitute Items
Price decimals 2	Prompt code 1 SDATE
Qty decimals 0	Prompt code 2 URENT
Warranty period 1 Days 💌	Prompt code 3 COMMENT
Warranty period 2 Days 💌	
Prompt for description 🕅	Weight
Prompt for price	Cube
Prompt for cost	Stocking unit EACH
Prompt for unit 🔽	
Prompt for custom fields	
Line custom prompts	
F <u>o</u> od stamp item 厂	
Admission tic <u>k</u> et 📃	
Weighed 🥅 Tare weight code	2
	>>
Inventory Prices Vendor Items	

The item *Prompt code* for rental start date is defined as displayed below. If making reservations for a class or similar event, this prompt can simply be called "Reservation date" or a comparable description.

🔯 Item Prompt Codes (from loo	okup)
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Prompt code SDATE	
De <u>s</u> cription Rental	start date
Te <u>x</u> t to display Rental	start date
D <u>a</u> ta type Date	▼
N <u>u</u> mber of decimals 0	
Entry required	
Once per document	
<u>C</u> onstraint	
Error message	
Iest	constraint

The item *Prompt code* for length of rental is set up as shown below. This number will be the multiplier for the multi-tiered pricing.

🔯 Item Prompt Codes (f	rom lookup)
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🗲 🔒 - 🗙 🖻 🖽 🤅	<b>∃</b> - 12 <b>⊡</b>
Prompt code	URENT
De <u>s</u> cription	Days/Weeks to rent
Te <u>x</u> t to display	Days/Weeks to rent
D <u>a</u> ta type	Numeric 🗨
N <u>u</u> mber of decimals	0
Entry required	
Once per document	
Qty sold must be 1	
Constraint	
	, 
Egror message	
	<u>T</u> est constraint
L	

The comment *Prompt code* is optional, but can provide additional useful information to be transferred to the ServicePoint calendar.

🔯 Item Prompt Codes (from lookup)	? 💌
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Prompt code COMMENT	
Description Comment	
Text to display Comment	
D <u>a</u> ta type Alpha	•
Number of decimals 0	
Entry required	
Once per document	
Uty sold must be 1	
<u>C</u> onstraint	
Error message	
	-1
<u>I</u> est constrair	it

#### "Half-day rental" CounterPoint Item Setup

An alternative method of setting up an item for rent exists for items to be rented for "half days". The setup for these is the same as outlined in the previous section of this document, with the following exceptions. The ServicePoint trigger routine will recognize the parameters and reserve the time accordingly.

An alternate unit and pricing is set up as in full day rentals. For clarity, the example item below has an alternate unit of "1/2 DAY" applied, with a price of \$5 for the half day rental period.

ka Items	
Eile ▼ Edit ▼ Data ▼ Help ▼   C	9 🖸
Item number HDTABLES	Item type Non-Inventory  Tracking method Normal
Main     Description     Units     Grid     Barcodes     Profiles     Serialized     Ecommerce     Other     Substitute       1/2 DAY     Alt-2     Alt-3     Alt-4     Alt-5       Alt-1     Price-1     125.00	e Items
Aller unit     172 DAT     Stocking unit     EACH       1     1/2 DAY     1     EACH     Preferred unit     EACH       Aller1 price-1     5.00     5.00     5.00     5.00	•
Alt-1 regular price 5.00 Alt-1 weight Alt-1 cube	
Inventory Prices Vendor Items	<u>&gt;&gt;</u>

The "Other" tab in item setup is similar to the full day rental items, with the exception of *Prompt code 2*, which is set to record the *Start time* of the desired rental period. When selected during rental order entry, the half day rental item will prompt for *Rental date* and *Rental start time*". This information will be used to block out the half day on the rental calendar beginning at the specified time.

Note that the second se	x
<u>File + Edit + Data + H</u> elp +	
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Item number HDTABLES	•
Tracking method Normal	-
Description 1/2 Day Rental tables	
Main Description Units Grid Barcodes Profiles Serialized Ecommerce Other Substitute Items	
Price decimals 2 Prompt code 1 SDATE	
Qty decimals 0 Prompt code 2 STARTTIME	
Warranty period 1 Days  Prompt code 3 COMMENT	
Warranty period 2 Days	
Prompt for description	
Prompt for price	
Prompt for cost	
Prompt for unit 🔽	
Line custom prompts	
F <u>o</u> od stamp item 🕅	
Admission ticket	
Weighed 🔲 Tare weight code	
	>>
Inventory Prices Vendor Items	

The item *Prompt code* for rental start time is defined as displayed below. Time entry during rental order is flexible, allowing "10:00", "10AM", "2:15PM", "14:15", etc.

🔯 Item Prompt Codes (f	rom lookup)
<u>F</u> ile ▼ <u>E</u> dit ▼ <u>D</u> ata ▼	<u>H</u> elp ▼
🛾 🔂 🖬 🛪 🔁 🖼 (	<b>∃</b> - 12 2
Prompt code	
Description	Rental start time
Te <u>x</u> t to display	Rental start time
D <u>a</u> ta type	Alpha 💌
N <u>u</u> mber of decimals	0
E <u>n</u> try required	
<u>Unce per document</u> <u>Q</u> ty sold must be 1	
Constraint	
<u>L</u> onstraint	
Error message	
	<u>T</u> est constraint

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