



# 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

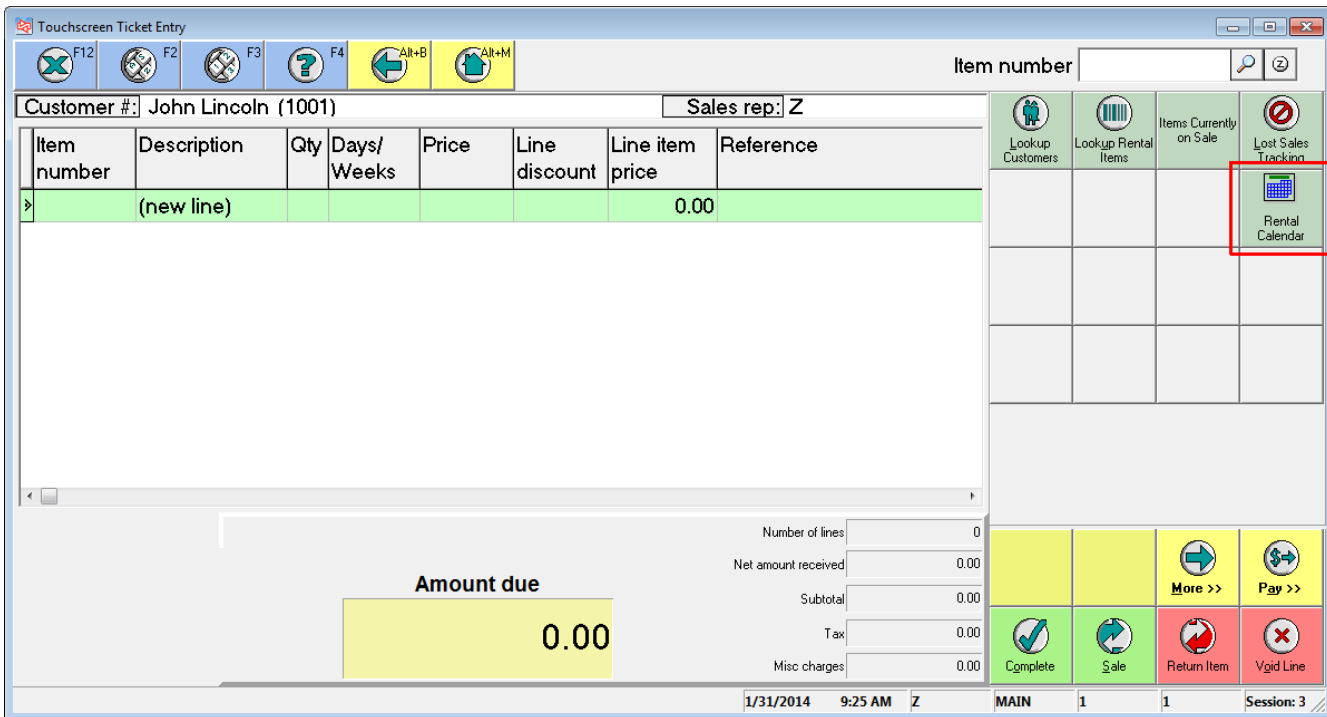
There are several types of rentals that can be performed using ServicePoint, as described in our earlier white-paper entitled “Using ServicePoint for rentals”. These include *hourly usage*, *short-term* rentals, and *long term* rentals (with recurring periodic billing). Generally, the uses described 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

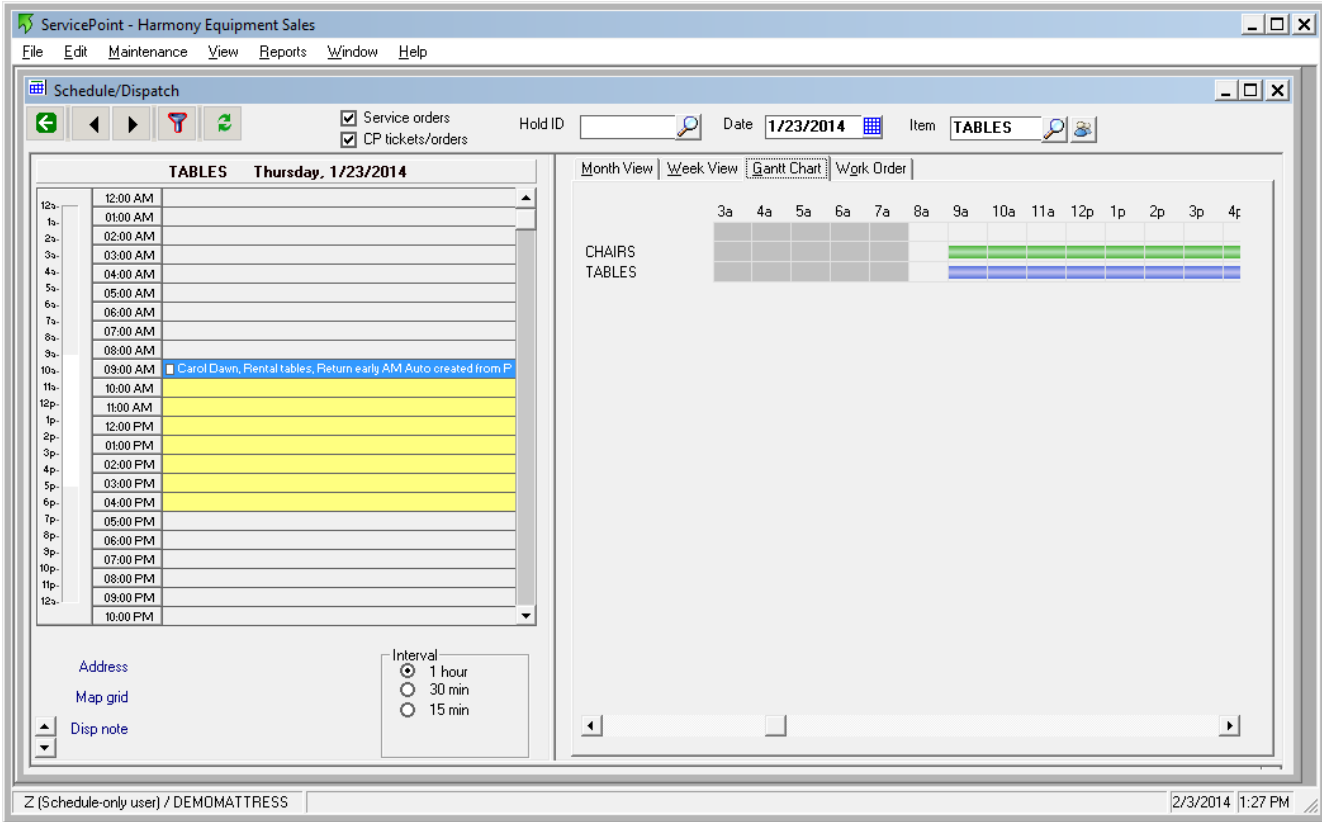
Some specific setup must be done in CounterPoint and ServicePoint to properly support the quantity rental process. The technical aspects of the setup are covered in detail later in this document. An explanation of the day-to-day processing follows.

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.

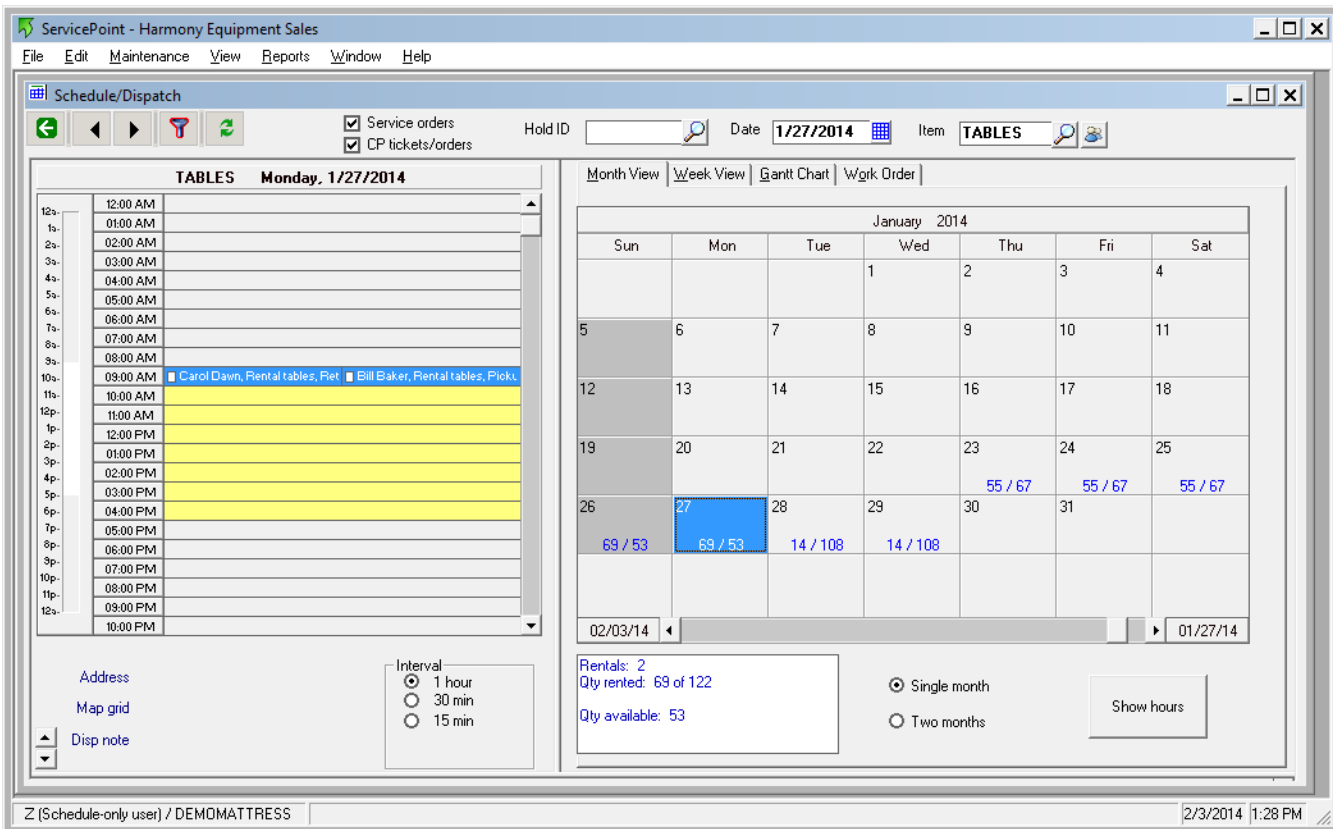


Pressing the “Rental Calendar” button will invoke the ServicePoint schedule screen. In the following screens, we have automatically filtered the lookup by a specific class of items. This is customizable by the user, and multiple rental calendars may be kept for different items types, events, or resources.

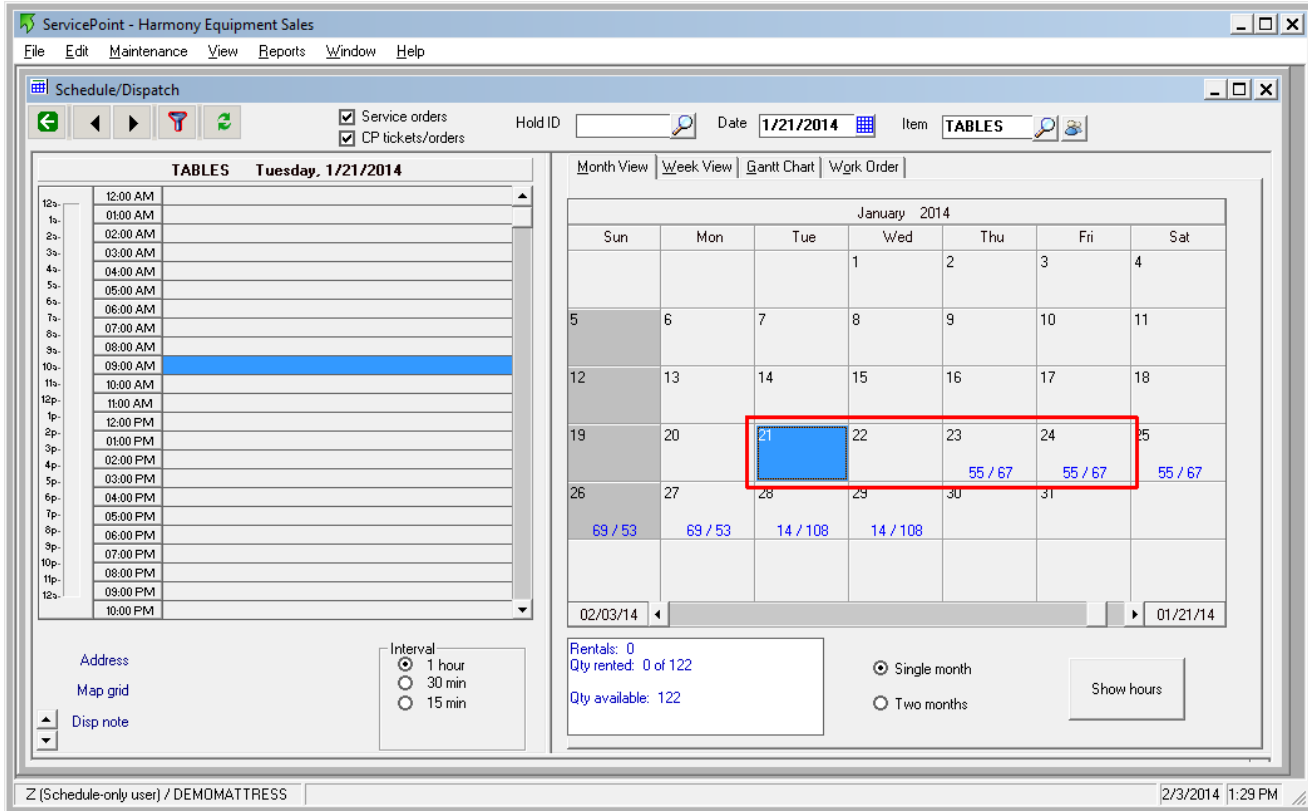
This screen shows the availability of a class of item, pre-filtered by certain criteria (in this case, based on user) to show “Chairs” and “Tables” offered for rent. A single type of item is selected by clicking on the appropriate line.



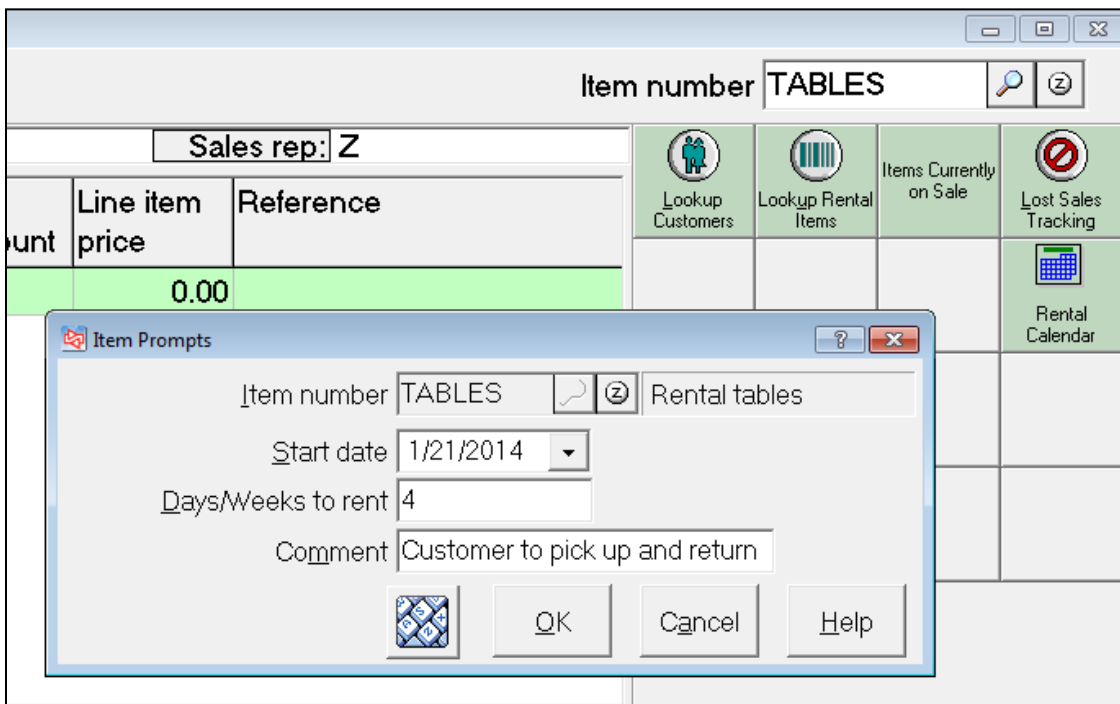
Switching to a *month* view shows the currently committed rental quantities for the item. In the screen below, we are showing two separate rentals for tables, committing 69 of the available 122 tables on January 27. Each day in the monthly calendar shows the number reserved, followed by the remaining 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<sup>st</sup> through the 24<sup>th</sup> is 67, based on a pre-existing rental later in the week.



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.



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.

The screenshot shows the 'Touchscreen Ticket Entry' application. At the top, there are function keys F12 through F4 and navigation keys Alt+B and Alt+M. Below this, the customer information is displayed: 'Customer #: John Lincoln (1001)' and 'Sales rep: Z'. A table lists the items:

Item number	Description	Qty	Days/ Weeks	Price	Line discount	Line item price	Reference
TABLES		100...	4.0000			0.00	

An 'Enter Quantity' dialog box is open, showing 'Item number' as 'TABLES' and 'Rental tables'. The 'Quantity' field is set to '15'. Below the quantity field, three rental unit options are shown: 'EACH \$125.00', 'DAY \$5.00', and 'WEEK \$25.00'. The 'DAY \$5.00' option is highlighted with a red box. At the bottom of the dialog are buttons for 'OK', 'Cancel', 'Details', and 'Help'. In the background, the 'Amount due' is displayed as '0.00'.

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.

The screenshot shows the 'Touchscreen Ticket Entry' application with the updated item list. The customer information remains the same: 'Customer #: John Lincoln (1001)' and 'Sales rep: Z'. The table now shows the following items:

Item number	Description	Qty	Days/ Weeks	Price	Line discount	Line item price	Reference
TABLES	Rental tables	15	4.0000	20.00	0.00	300.00	
	(new line)					0.00	

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.

The screenshot shows the 'Touchscreen Ticket Entry' interface. At the top, there are function keys F12, F2, F3, F4, and navigation buttons Alt+B and Alt+M. The customer information is 'John Lincoln (1001)'. A table lists items: 15 rental tables at 20.00 each and 120 rental chairs at 6.00 each. A modal dialog titled 'Enter Quantity' is open, showing 'CHAIRS' selected with a quantity of 120. Below the dialog, the 'Amount due' is highlighted in yellow as 1,127.10.

Item number	Description	Qty	Days/ Weeks	Price	Line discount	Line item price	Refere
TABLES	Rental tables	15	4.0000	20.00	0.00	300.00	
CHAIRS	Rental chairs	120	4.0000	6.00	0.00	720.00	

**Amount due**  
1,127.10

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.

The screenshot shows the 'Touchscreen Ticket Entry' interface with the ticket lines saved. The customer is 'John Lincoln (1001)' and the sales rep is 'Z'. The table lists 15 rental tables, 120 rental chairs, and a new line with a price of 0.00. The 'Amount due' is highlighted in yellow as 1,127.10. A summary table on the right shows the number of lines, net amount received, subtotal, tax, and misc charges.

Item number	Description	Qty	Days/ Weeks	Price	Line discount	Line item price	Reference
TABLES	Rental tables	15	4.0000	20.00	0.00	300.00	
CHAIRS	Rental chairs	120	4.0000	6.00	0.00	720.00	
	(new line)					0.00	

**Amount due**  
1,127.10

Number of lines	2
Net amount received	0.00
Subtotal	1,020.00
Tax	107.10
Misc charges	0.00

1/31/2014 10:12 AM Z

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<sup>st</sup> through the 24<sup>th</sup>.

ServicePoint - Harmony Equipment Sales

File Edit Maintenance View Reports Window Help

Schedule/Dispatch

Service orders  
CP tickets/orders

Hold ID [ ] Date 1/21/2014 Item TABLES

**TABLES Tuesday, 1/21/2014**

Month View | Week View | Gantt Chart | Wgrk Order

January 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21 15 / 107	22 15 / 107	23 70 / 52	24 70 / 52	25 55 / 67
26 69 / 53	27 69 / 53	28 14 / 108	29 14 / 108	30	31	

Rentals: 1  
Qty rented: 15 of 122  
Qty available: 107

Single month  
Two months

Show hours

Z (Schedule-only user) / DEMDMATTRESS 2/3/2014 1:32 PM

The overlap with a pre-existing rental of tables on the 23<sup>rd</sup> and 24<sup>th</sup> have resulted in a combined total of 70 rented and only 52 available for those days.

ServicePoint - Harmony Equipment Sales

File Edit Maintenance View Reports Window Help

Schedule/Dispatch

Service orders  
CP tickets/orders

Hold ID [ ] Date 1/23/2014 Item TABLES

**TABLES Thursday, 1/23/2014**

Month View | Week View | Gantt Chart | Wgrk Order

January 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21 15 / 107	22 15 / 107	23 70 / 52	24 70 / 52	25 55 / 67
26 69 / 53	27 69 / 53	28 14 / 108	29 14 / 108	30	31	

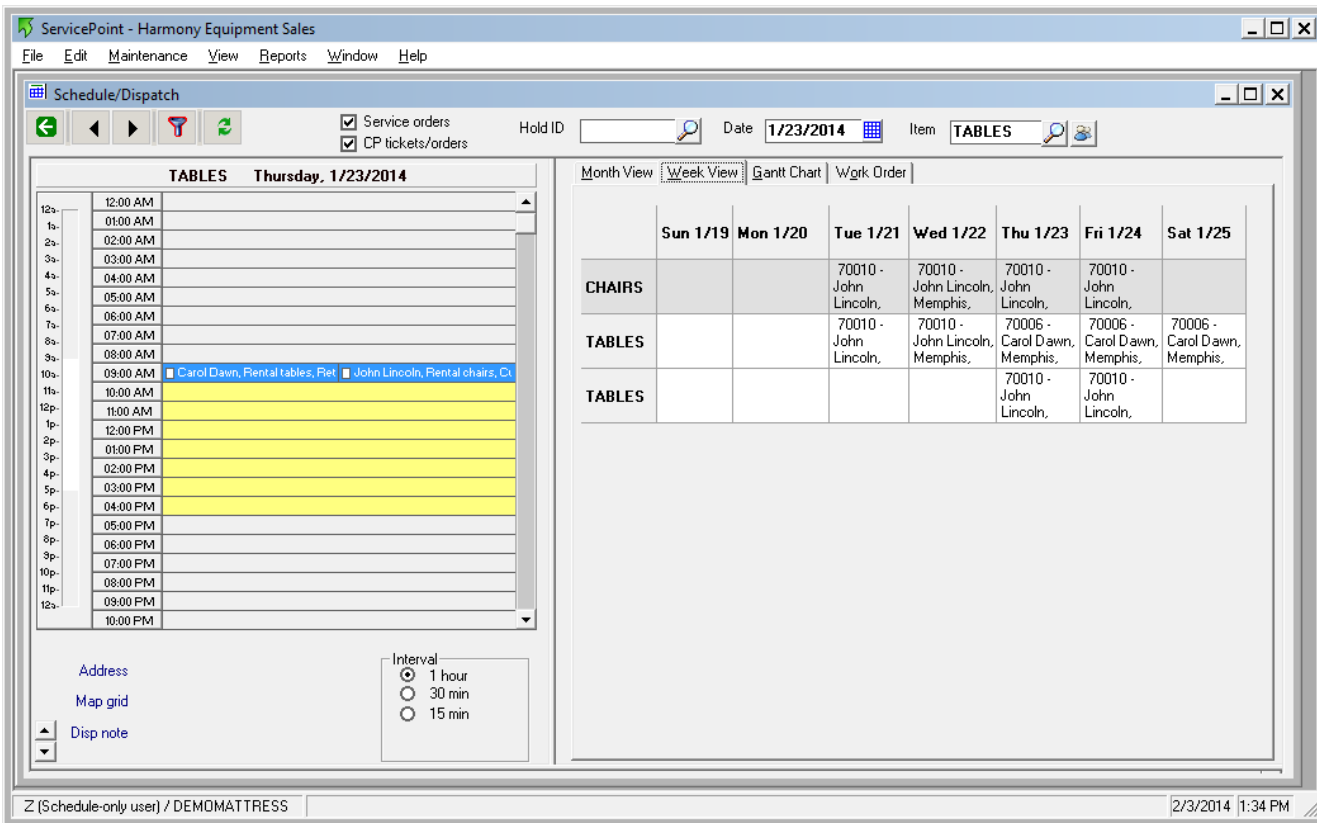
Rentals: 2  
Qty rented: 70 of 122  
Qty available: 52

Single month  
Two months

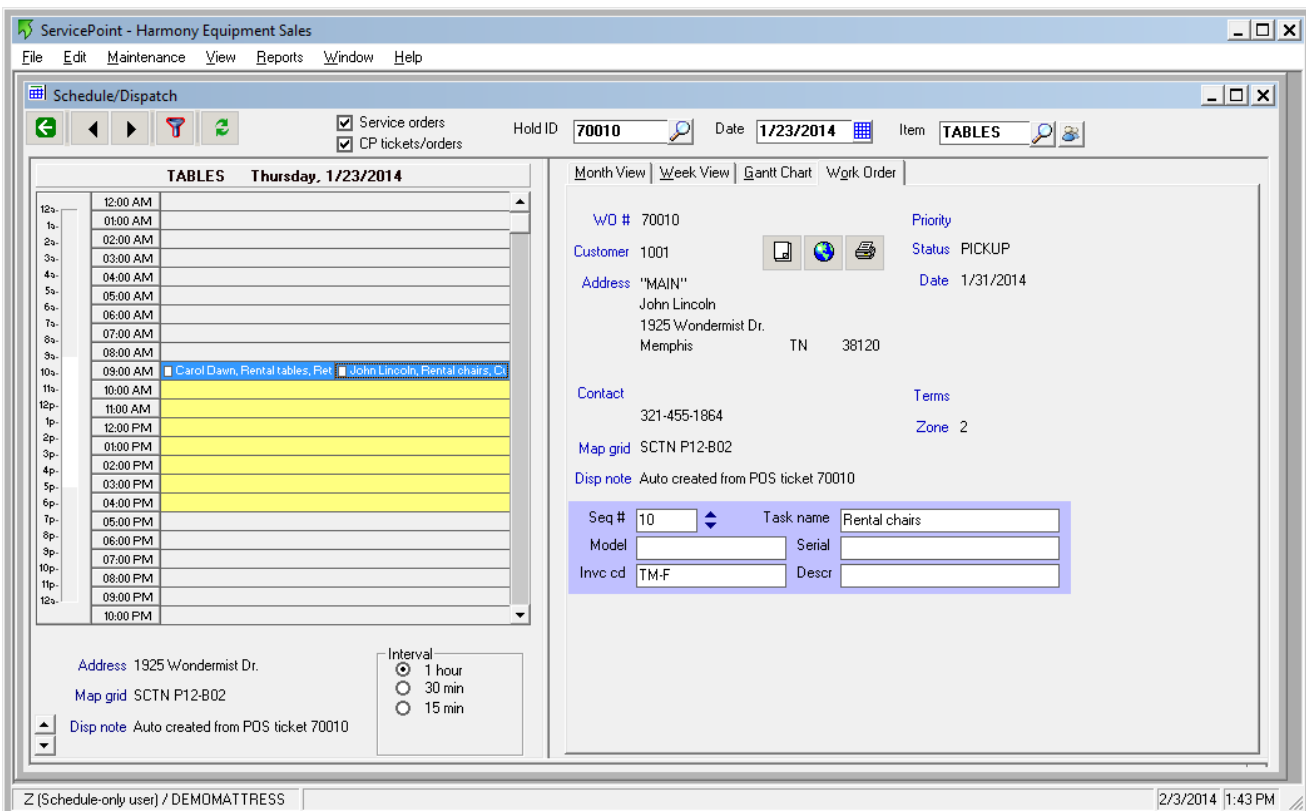
Show hours

Z (Schedule-only user) / DEMDMATTRESS 2/3/2014 1:33 PM

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



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.





## 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.

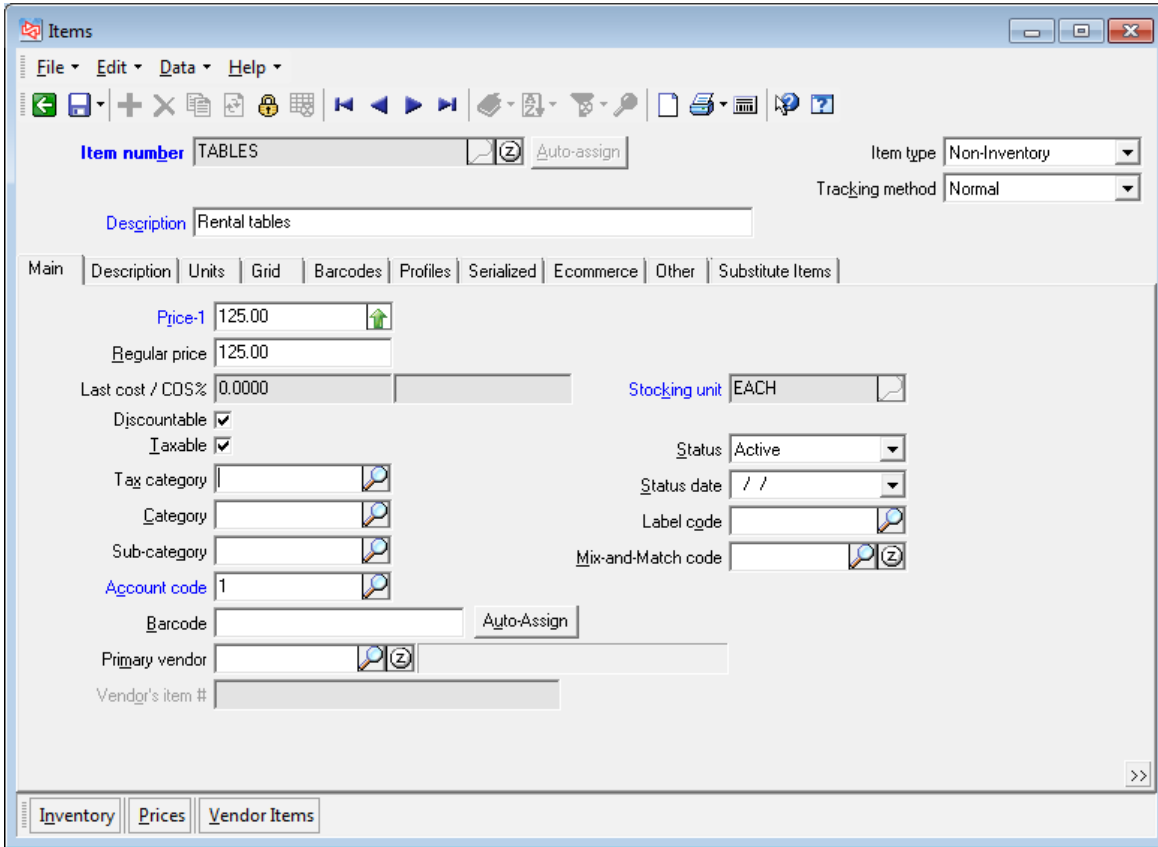
```
alter table IM_PRC_WRK add PROMPT_NO_2 T_USR_DEF_NO null
go
```

- 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.

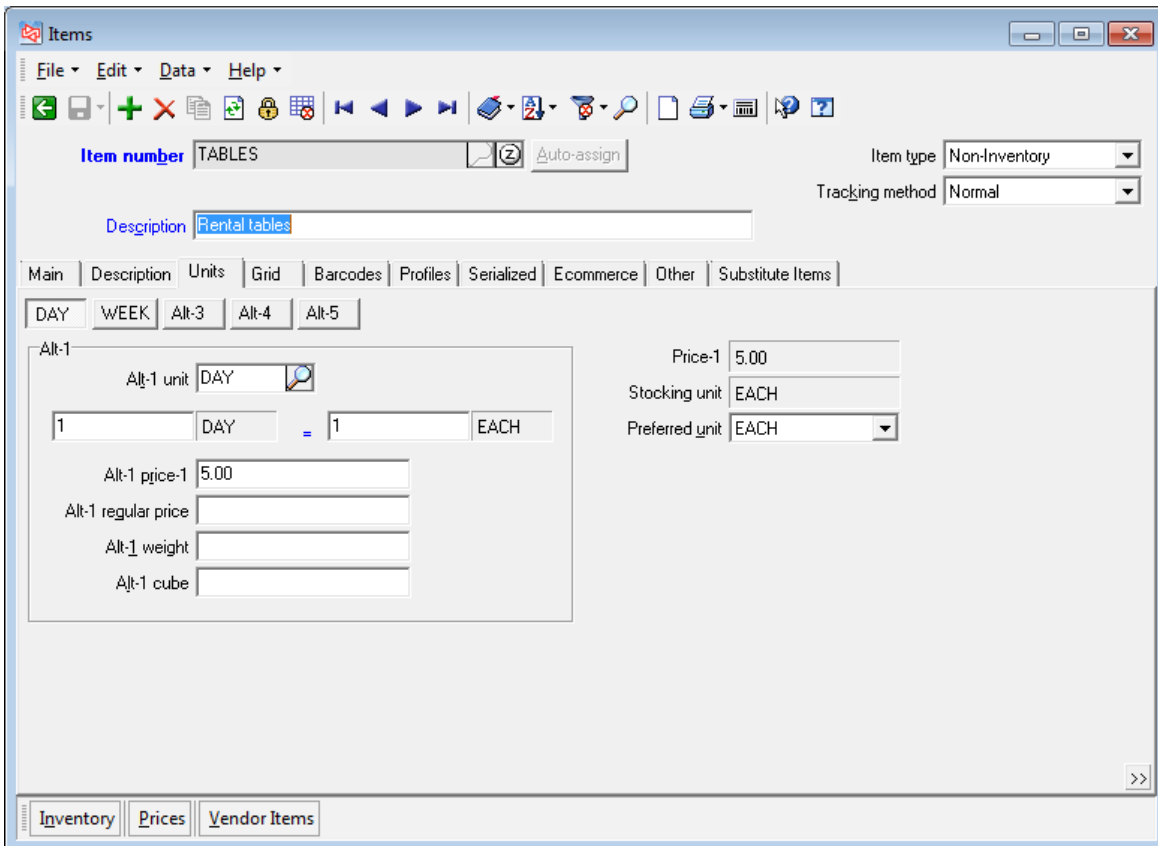
### CounterPoint Item Setup

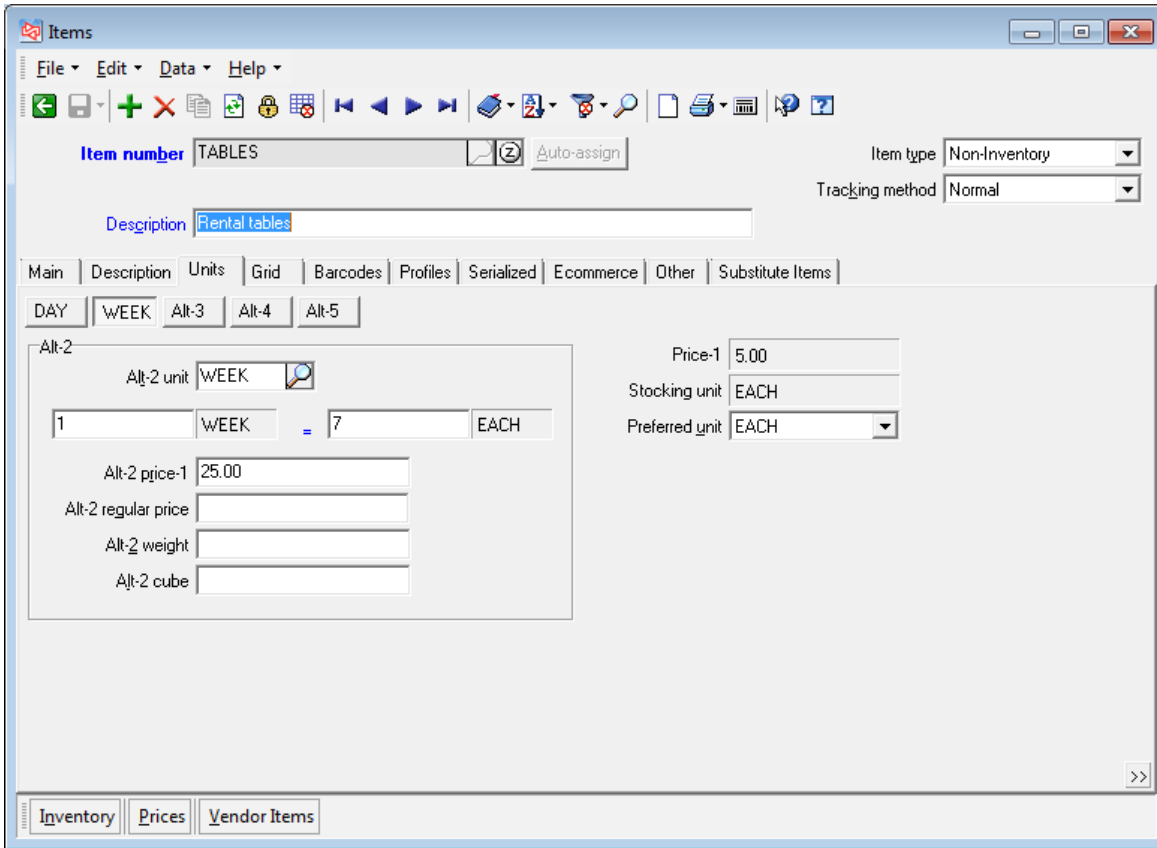
Items for rent should be set up using the following guidelines.

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).

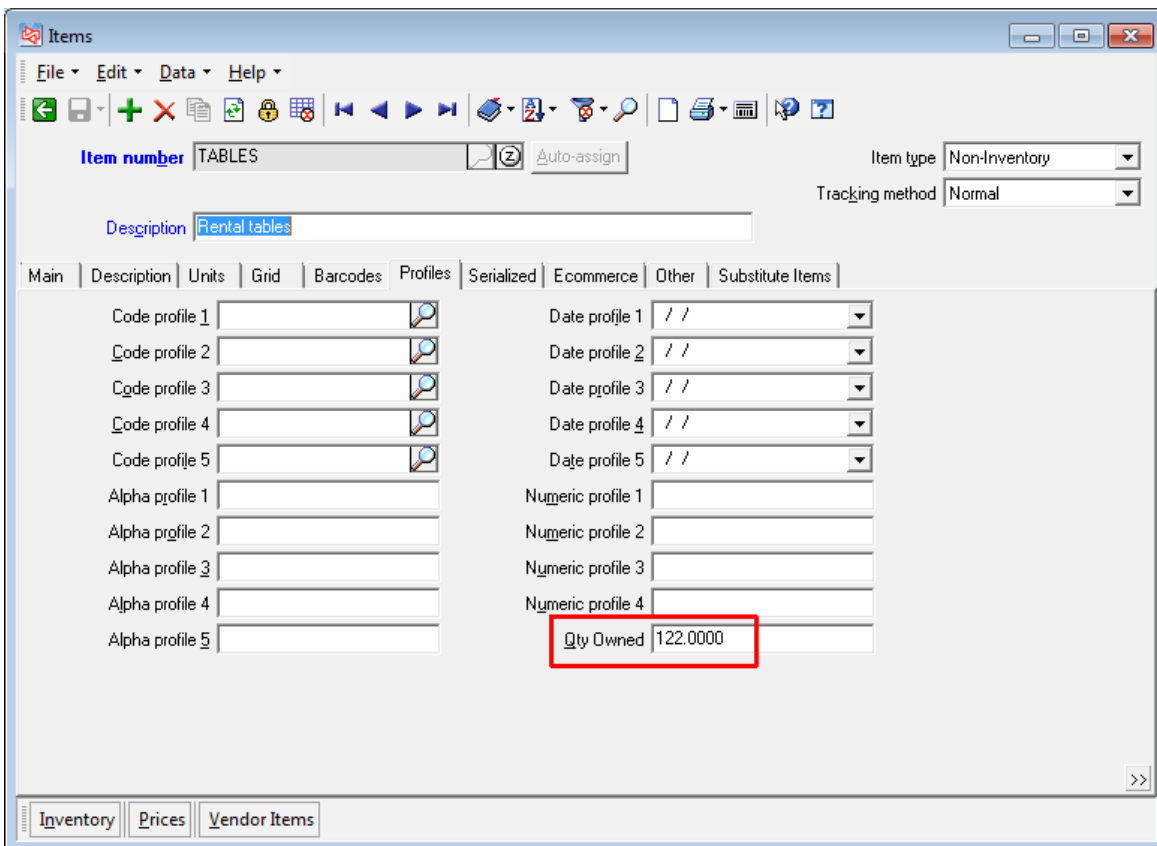


Alternate units are set up to charge for specific rental periods. Using this method allows for different pricing levels for daily, weekly, monthly, etc. rates.

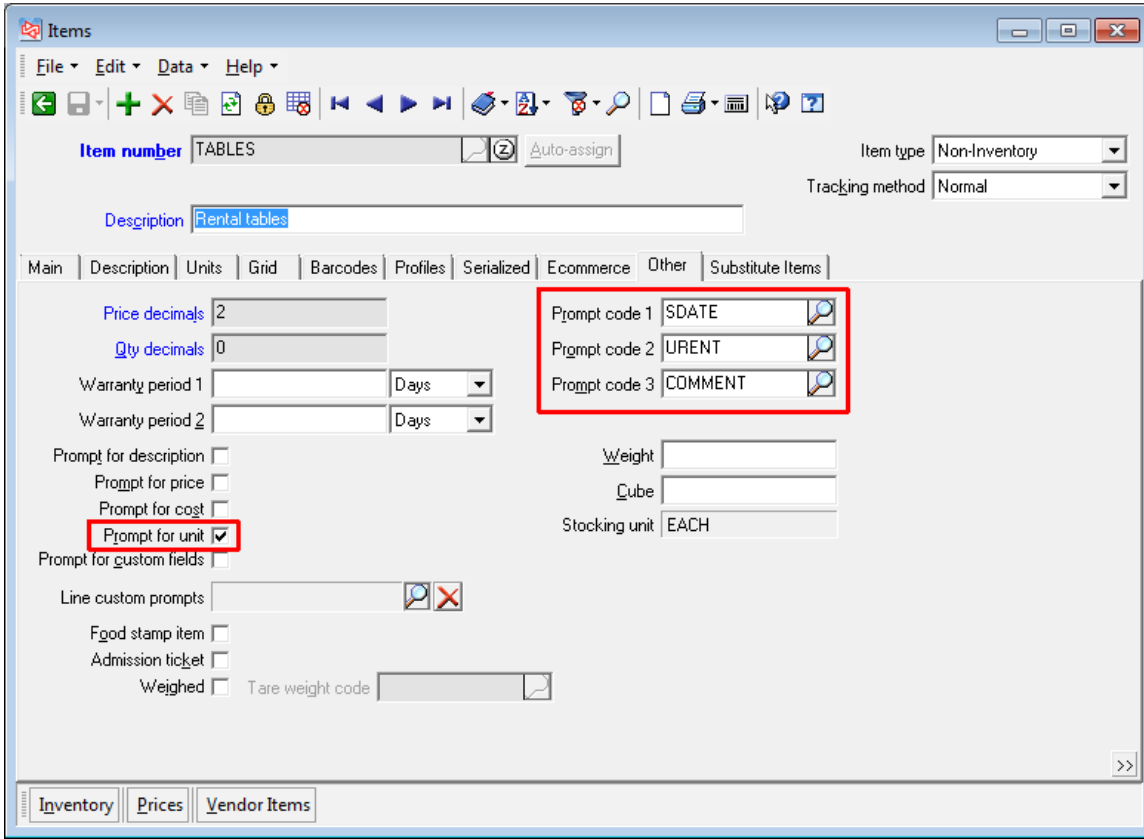




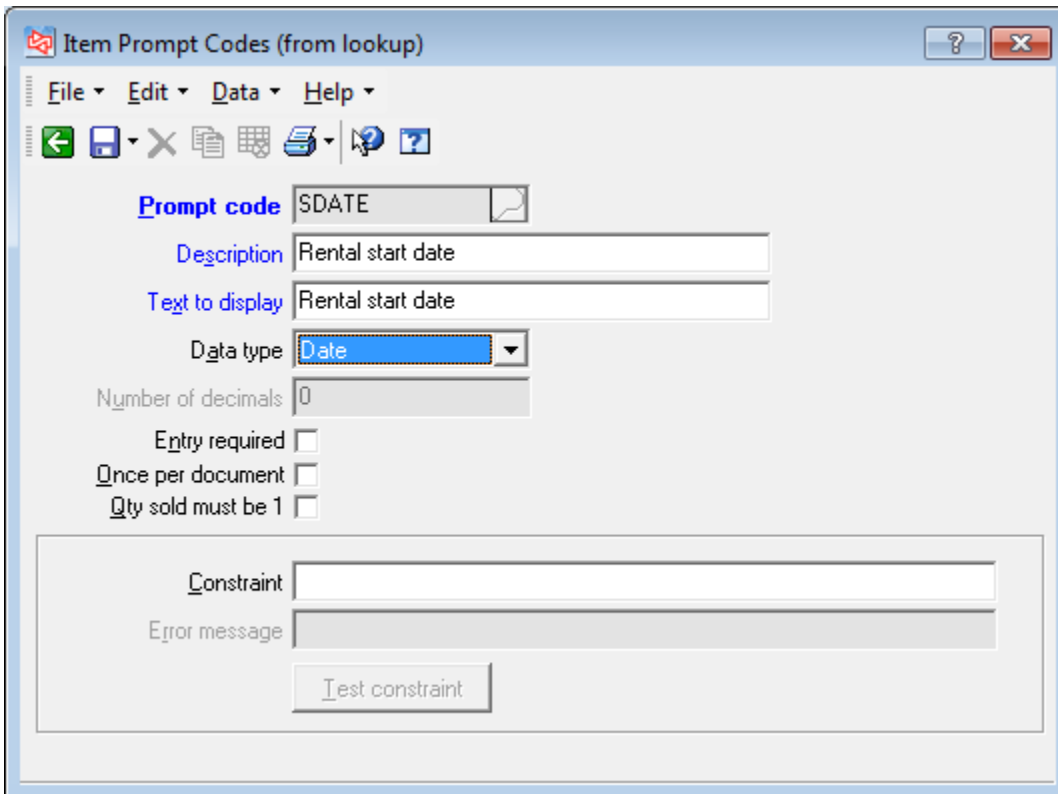
On the “Profiles” tab, we have used *Numeric profile 5* as the total number of rental units available. This number is used when determining the capacity available for reservation, including allowances for quantities already reserved.



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.



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.



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.

The screenshot shows a software window titled "Item Prompt Codes (from lookup)". It features a menu bar with "File", "Edit", "Data", and "Help". Below the menu is a toolbar with icons for back, save, delete, print, and help. The main form contains the following fields and options:

- Prompt code:** URENT
- Description:** Days/Weeks to rent
- Text to display:** Days/Weeks to rent
- Data type:** Numeric
- Number of decimals:** 0
- Entry required:**
- Once per document:**
- Qty sold must be 1:**
- Constraint:** (empty text box)
- Error message:** (empty text box)
- Test constraint:** (button)

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

The screenshot shows the same software window "Item Prompt Codes (from lookup)". The fields are filled with the following information:

- Prompt code:** COMMENT
- Description:** Comment
- Text to display:** Comment
- Data type:** Alpha
- Number of decimals:** 0
- Entry required:**
- Once per document:**
- Qty sold must be 1:**
- Constraint:** (empty text box)
- Error message:** (empty text box)
- Test constraint:** (button)

## “Half-day rental” CounterPoint Item Setup

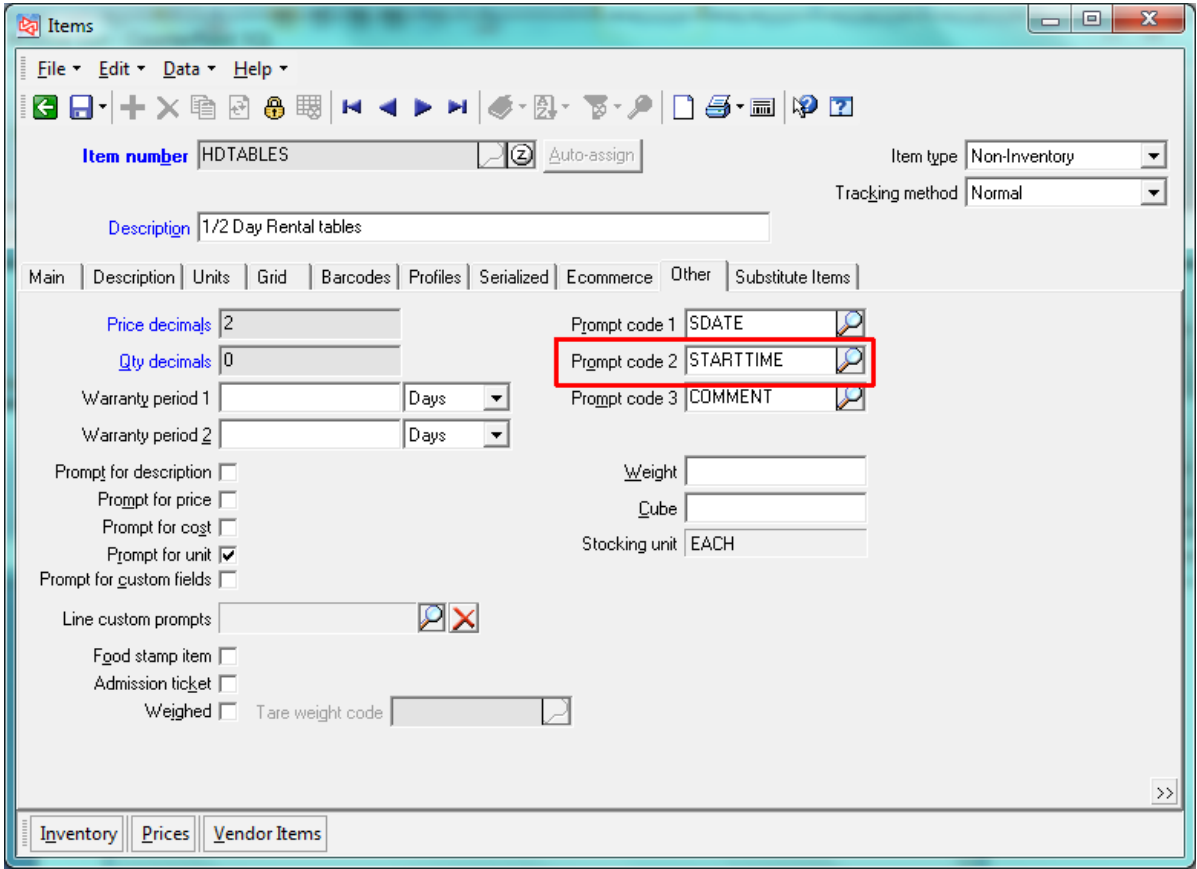
An alternative method of setting up an item for rent exists for items to be rented for “half days”. The setup for these is the same as outlined in the previous section of this document, with the following exceptions. The ServicePoint trigger routine will recognize the parameters and reserve the time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

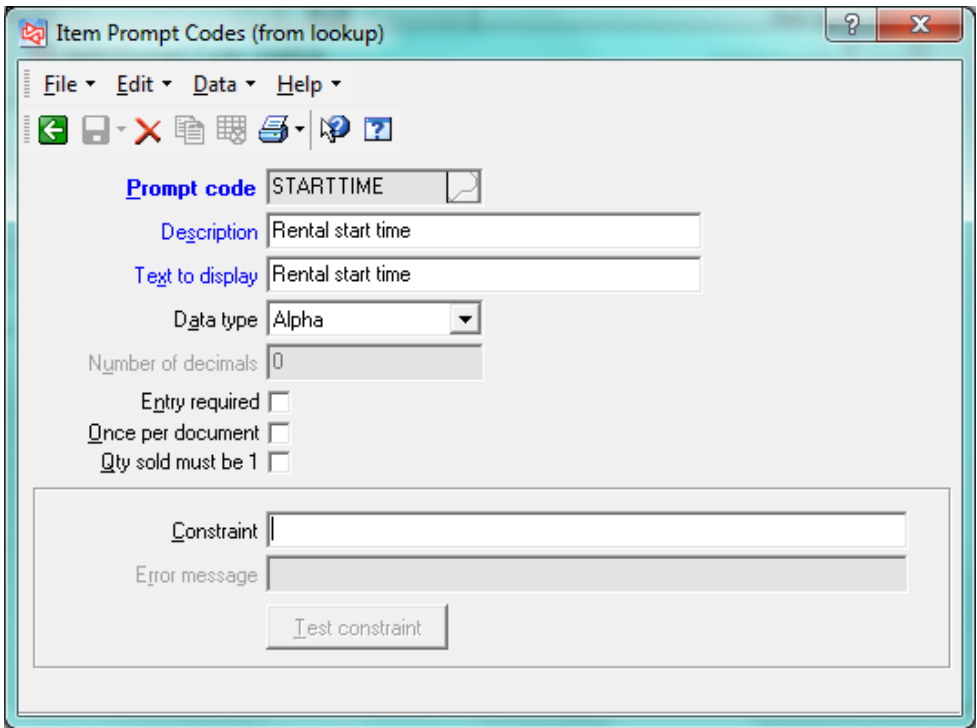
The screenshot shows the 'Items' window in CounterPoint. The 'Item number' is 'HDTABLES' and the 'Description' is '1/2 Day Rental tables'. The 'Item type' is 'Non-Inventory' and the 'Tracking method' is 'Normal'. The 'Units' tab is selected, showing the 'Alt-1' unit setup. The 'Alt-1 unit' is '1/2 DAY'. The 'Price-1' is '125.00', the 'Stocking unit' is 'EACH', and the 'Preferred unit' is 'EACH'. The 'Alt-1 price-1' is '5.00' and the 'Alt-1 regular price' is '5.00'. The 'Alt-1 weight' and 'Alt-1 cube' fields are empty. The 'Inventory', 'Prices', and 'Vendor Items' tabs are visible at the bottom.

Field	Value
Item number	HDTABLES
Description	1/2 Day Rental tables
Item type	Non-Inventory
Tracking method	Normal
Alt-1 unit	1/2 DAY
Price-1	125.00
Stocking unit	EACH
Preferred unit	EACH
Alt-1 price-1	5.00
Alt-1 regular price	5.00
Alt-1 weight	
Alt-1 cube	

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.



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.



Since 1987, RTM Computer Solutions has been a leader in providing expertise in automated systems for a wide variety of service businesses. We are dedicated to the development of high quality software products. Periodic updates to our software allow for faster, easier, and more efficient solutions.

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