



The transfer functionality is only available if you have the multi-location module. If you are interested in adding this functionality to your license please contact support@rentp.com for more information.

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1. When to Use Location Transfer

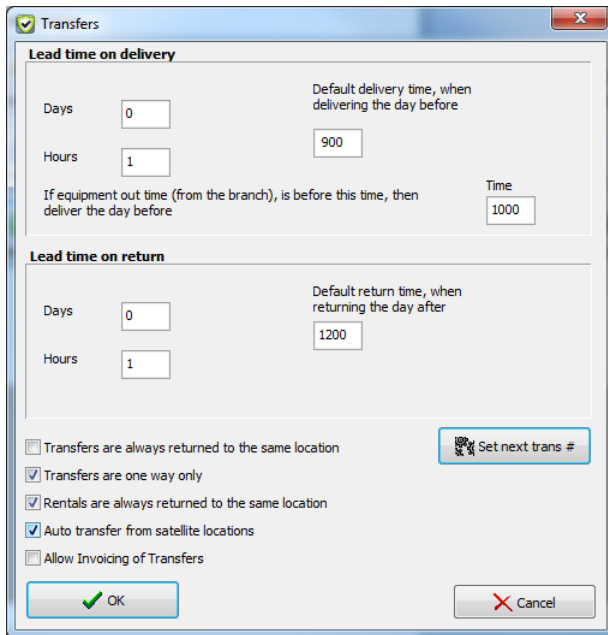
- If a location has a shortage and the product is available in another location, you can create a transfer to cover the shortage from another location.
- You can also create transfers via the shortages grid. The shortage grid provides options to assign shortages via a cross rental, transfer or purchase order. See Resolving Shortages Article for more information on resolving shortages



Note that transfers don't have the same 'Fixed' option that sub hires do. Other than using the assigned booking's reservation date, transfers go into a pool of stock that you have available for rental at the destination; so there is the possibility of another booking at that location taking precedence over the assigned booking. Use 'Manage Reservations' option to resolve reservation precedence http://rentp.com/KnowledgebasePDFs/Manage_Reservations.pdf

2. Transfer Parameters

Transfer options are available under the Transfers section of set-up parameters.



Other parameters affecting transfers are:

- Accounts #26 – Close out Transfers for Month
- Operational #75 – Transport Dates in Cross Hires
- Operational #132 – Displaying Transfers and Cross Hires

3. One Way Transfers (permanent transfers)

One way transfers are used when equipment is being transferred to another warehouse location permanently (or for an undetermined period of time). When you create a one way transfer, meaning that the equipment will remain in the location it is sent to the transfer booking will be archived as soon as all the stock has been checked in at the destination and the transfer has been marked in 'R' status.

- Once entered transfer bookings appear in the booking grid
- One way transfers are handled similar to a booking where they have one checkout and return except that the return happens at the destination location.
- If the equipment on the transfer is barcode tracked you need to check out the transfer booking FROM Location A and check it in to Location B.
- Assets being returned will be updated to reflect their new permanent location. If Operational parameter #65 is enabled, asset tracked items (checked out with a barcode) will



RentalPoint Location Transfers

be moved as soon as they are returned even if the transfer is not final returned immediately.

- Transfers will archive on final return.
- Once archived the stock quantities in product set-up will be updated to reflect the transfer.

Sample One Way Transfer

Here's an example of a product before a one way transfer.

#	Location Name	Quantity	Bin location
0	Home Office	5.00	0.00
1	Main	0.00	0.00
2	Other	0.00	0.00
3	Halifax	0.00	0.00
4	San Deigo	0.00	0.00

Here two of the items are placed on a transfer.

RP Transfer - T000000000061

Dates	Equipment	Notes			
Code	Description	Quantit	Avail. at Home Office	Shor	Avail. at Halifax
1/2VHS	1/2 Inch VHS VCR	1	5	0	1
MARKERS	Flipchart markers	1	0	1	1
POWERC	Power cord	1	0	1	1
12'W	12' winchup stand	3	5	0	3
AG	AG monitor	2	4	0	2
PIPE1	Alumimium Pipe 1m	2	3	0	2
MA	Microphone	2	5	0	0

After all the items are checked in to the destination and final return is selected.

Return Equipment, Booking : T000000000061 to Location : 3 - Halifax

Enter Barcodes | Scanner Sessions | Current Session

Equipment out and to be tracked with the bar code scanner				Equipment returned - [bar code scanned]	
Product Code	Barcode	Description	R	Barcode	Description
1/2VHS-1	VCR1	1/2 Inch VHS VCR	Y	VCR1	1/2 Inch VHS VCR
12'W-2	12'W-2	12' winchup stand	Y	12'W-2	12' winchup stand
12'W-3	12'W-3	12' winchup stand	Y	12'W-3	12' winchup stand
12'W-5	12'W-5	12' winchup stand	Y		

Product Code	X Rent	Description	Out	Returned Qt
MA		Microphone	2	2

Errors and Warnings

Auto save errors and display list after return has closed

Barcode	Message
12'W-1	12' winchup stand is in the warehouse at Home Office.

Return Date: 08/02/1
 Return Time: 0914

Unused equipment [partial return]
 Partial return [before return date]
 Final Return
 Undo Checkout

The transfer is moved to the archived area.

RP RentalPoint 11.1.8.0

Actions Reports Crystal Reports Assets Setup Others Help

Bookings New Find Open View Work Adm

Code	Organization	Out	Date	Time	In	Date
T000000000061	0 - Home Office to 3 - Halifax	Mon	08/02/2016	10:00	Mon	08/02/2016

Sequence: [Dropdown] Scope: [Dropdown]


<input checked="" type="checkbox"/> Quotes	<input checked="" type="checkbox"/> Rental	<input checked="" type="checkbox"/> Booked	<input checked="" type="checkbox"/> Invoiced	<input checked="" type="checkbox"/> Not Required
<input checked="" type="checkbox"/> Light Pencil	<input checked="" type="checkbox"/> Sales	<input checked="" type="checkbox"/> Pull	<input checked="" type="checkbox"/> Uninvoiced	<input checked="" type="checkbox"/> Required
<input checked="" type="checkbox"/> Heavy Pencil	<input checked="" type="checkbox"/> Sub rental	<input checked="" type="checkbox"/> Out	<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/> Assigned
<input checked="" type="checkbox"/> Confirmed	<input checked="" type="checkbox"/> LT rental	<input checked="" type="checkbox"/> Returned		
<input checked="" type="checkbox"/> Cancelled	<input checked="" type="checkbox"/> Transfers			

Data to View
 Current Archive

The stock now appears at the destination.

RP Edit Product Record : Microphone

General		Picture	Rental Rates	Sales	Notes	Location	Attachments
#	Location Name	Quantity	Bin location				
0	Home Office	3.00	0.00				
1	Main	0.00	0.00				
2	Other	0.00	0.00				
3	Halifax	2.00	0.00				
4	San Deigo	0.00	0.00				

 if Operational parameter #65 is enabled, asset tracked items (checked out with a barcode) will be moved as soon as they are returned even if the transfer is not final returned immediately.

4. Two Way Transfers (temporary transfers)

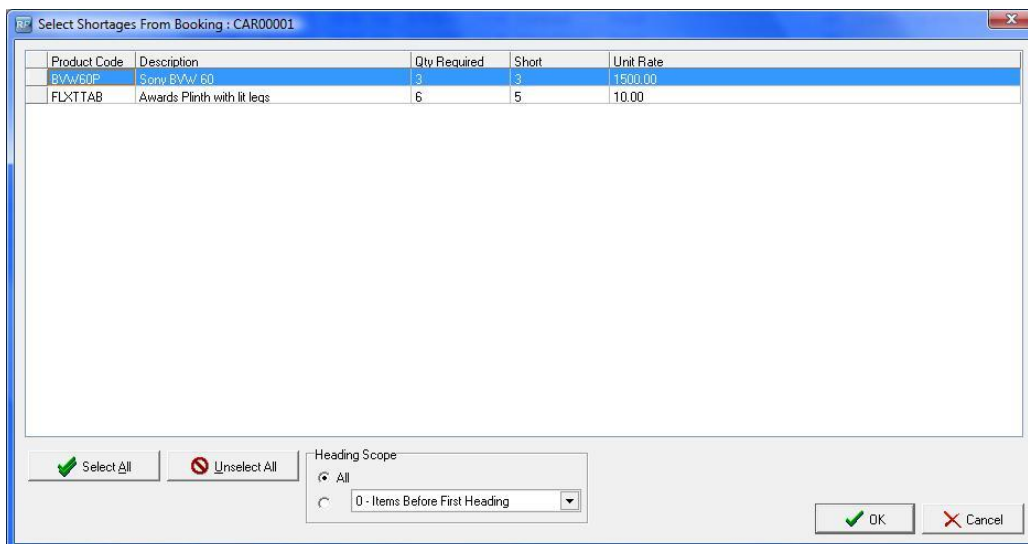
Two way transfers can be used to temporarily lend stock to another location to cover shortages they may have.

- Once entered transfer bookings appear in the booking grid
- Two way transfers have four checkout points (Checkout from source, check-in at destination then checkout at destination and return to source)
- Two way transfers only cover shortages within the specified time period of the transfer.
- Assets location is not affected by being checked out and returned from a two way transfer.

Note: Operational parameter #65 "Count Assets for quantity" cannot be in use if you wish to use two way transfers

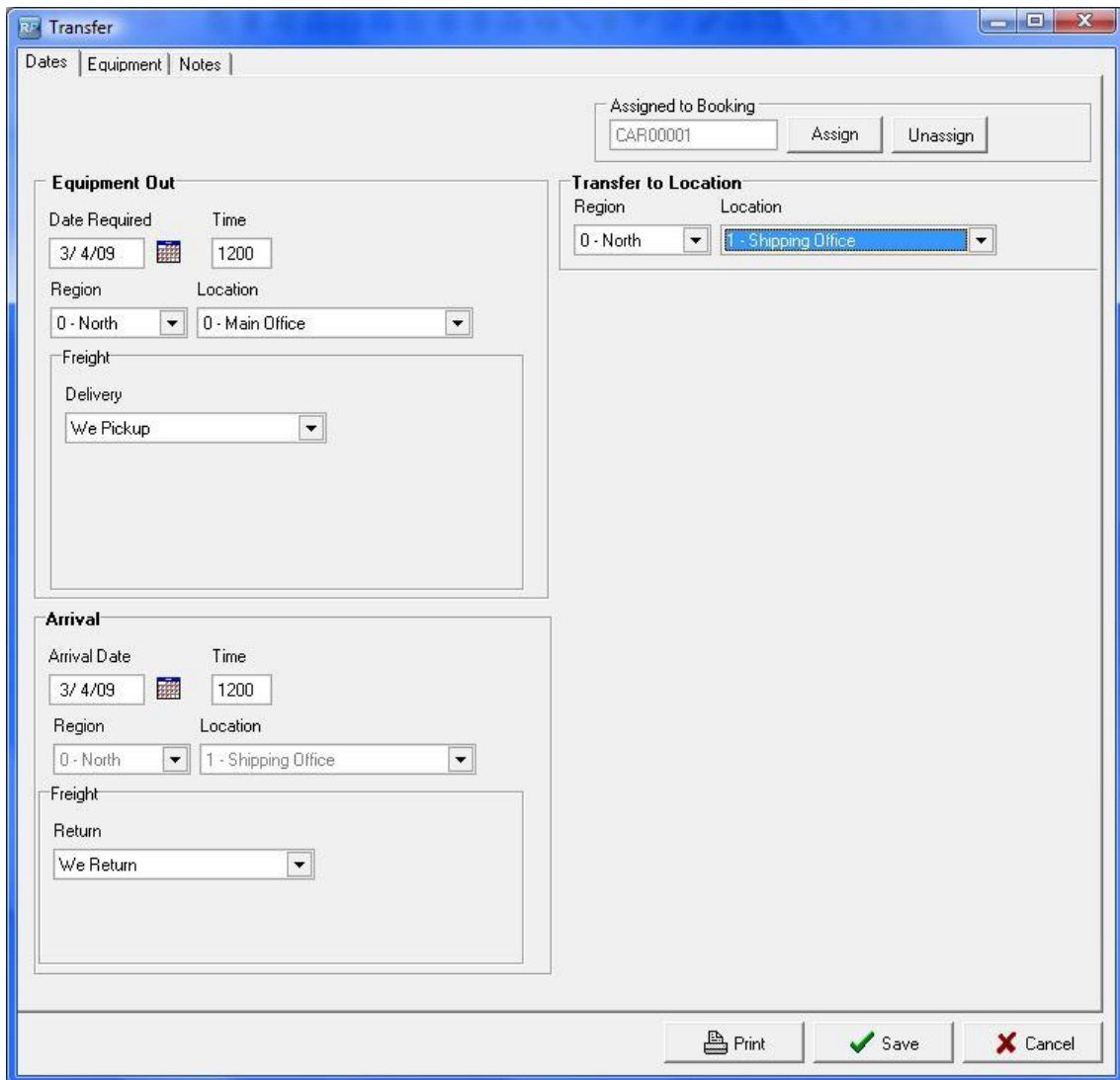
5. Entering a Transfer

- Highlight the booking you want to transfer items for.
- Right click and select New [Select] then click Transfer.
- The items on the booking are listed in a selection window (see below)
- Select the items you would like to transfer and click OK.
- The transfer window will display and the details for the transfer, these details can be reviewed and changed if need be (see illustrations below)
- **Once the transfer is completed it will display in the booking grid.**
- To isolate which bookings are transfers you can use the scopes and limit the results to only display transfers.



5.1 Dates Tab

- The dates of the transfer are copied from the warehouse out and warehouse in dates of the booking.
- By default, the delivery time of the transfer will be an hour before the actual warehouse delivery time and the return time of the transfer will be an hour later then the warehouse return time.
- You may override these dates by entering the actual dates and times that the transfer will be picked up and returned.
- Ensure that the Equipment In date and time are before the date and time the booking is scheduled to leave the warehouse. Likewise for the equipment out date and time, the dates and times need to be adjusted till after the booking returns to that warehouse.



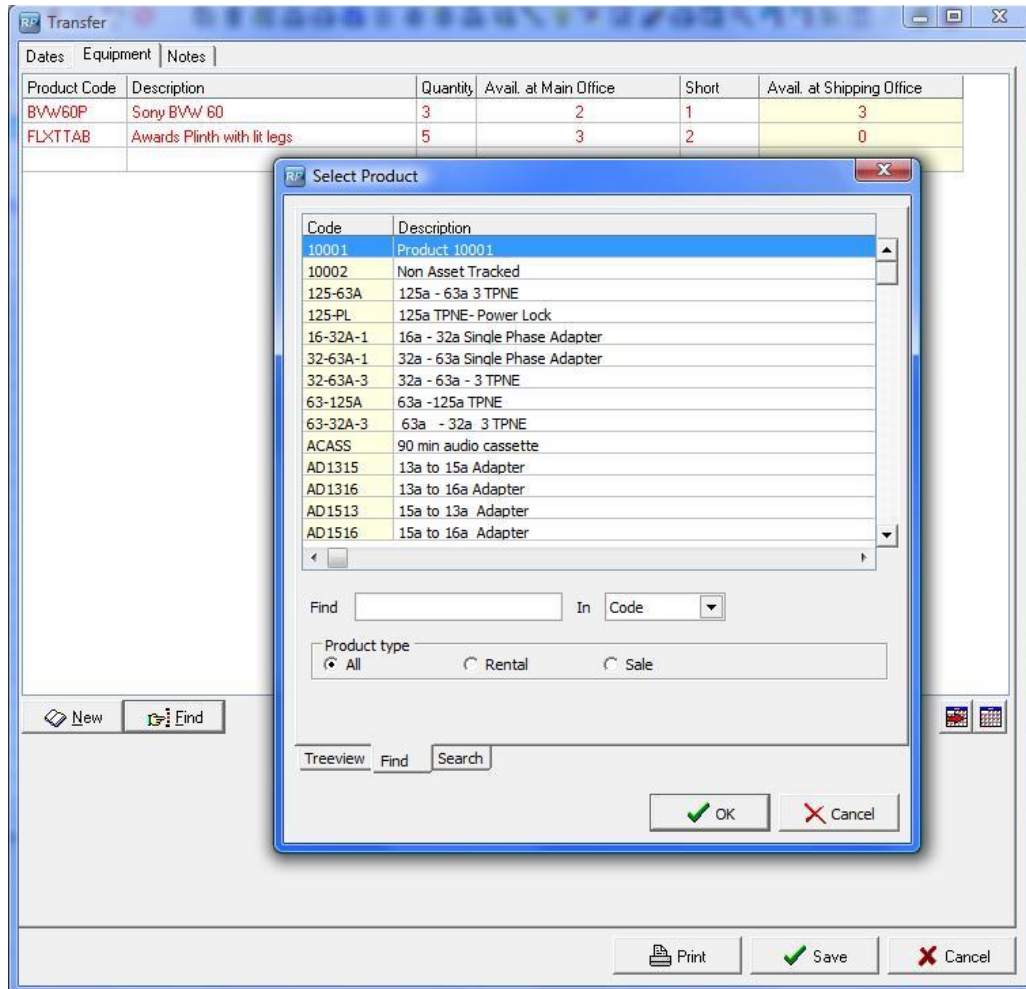
The screenshot shows the 'Transfer' window with the 'Dates' tab selected. The window is divided into several sections:

- Assigned to Booking:** A text field contains 'CAR00001', with 'Assign' and 'Unassign' buttons to its right.
- Equipment Out:**
 - Date Required: 3/4/09
 - Time: 1200
 - Region: 0 - North
 - Location: 0 - Main Office
 - Freight: Delivery (We Pickup)
- Transfer to Location:**
 - Region: 0 - North
 - Location: 1 - Shipping Office
- Arrival:**
 - Arrival Date: 3/4/09
 - Time: 1200
 - Region: 0 - North
 - Location: 1 - Shipping Office
 - Freight: Return (We Return)

At the bottom of the window are three buttons: 'Print', 'Save', and 'Cancel'.

5.2 Equipment Tab

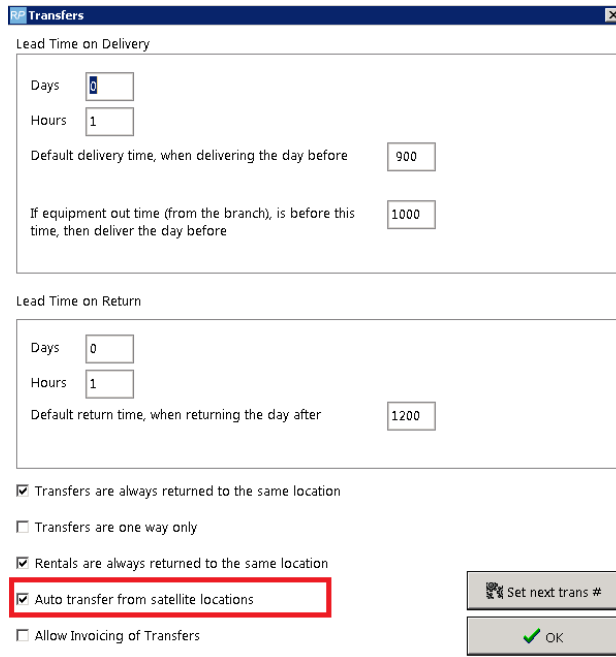
- **Quantity-** The Equipment tab is automatically loaded with the required quantity from the booking. The quantity can be changed by selecting the quantity field and entering the desired amount.
- **Adding Items -** Click New or Find to add another item to the list.



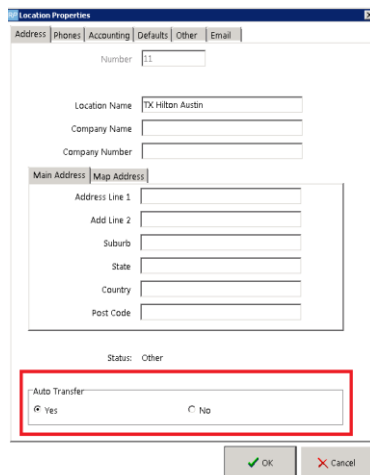
6.Satellite Location/ Auto Transfers

Rentalpoint allows locations to be set up for ‘auto transfer’; these locations are known as ‘Satellite Locations’. When a shortage occurs at a satellite location, a transfer is automatically created and is accessible from a tab within the booking. In order to use this functionality, a few parameters need to be set in Rentalpoint.

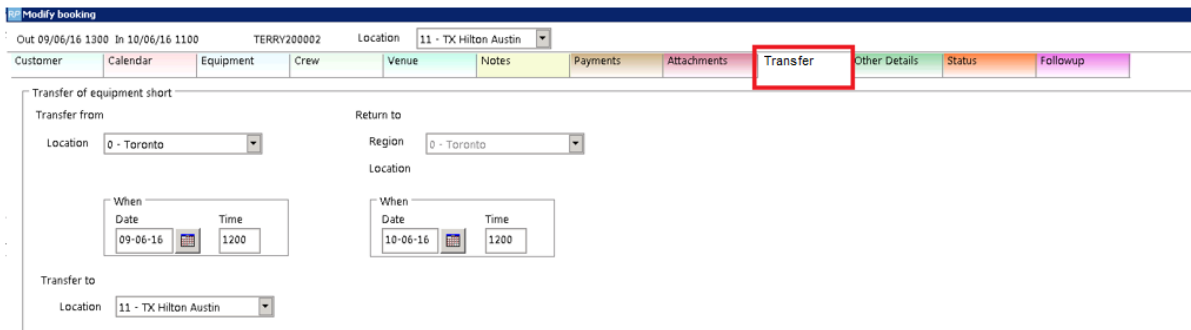
Set ‘auto transfer’ within the parameter settings.




Set your location as an ‘Auto Transfer’ location



When you enter an item that is short, you can access the transfer via the transfer tab within the booking

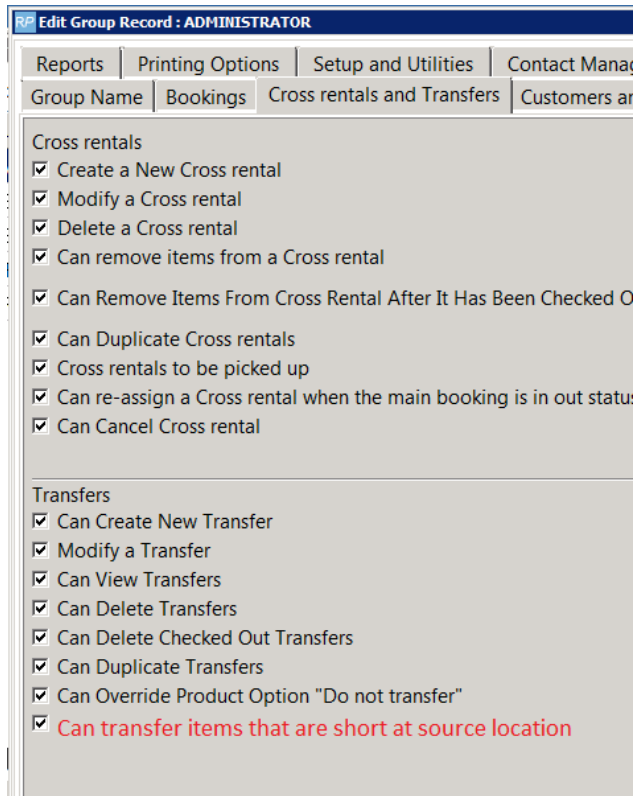


 New to v11.3.2.0

- Auto transfers are:
 - only created when the booking is confirmed
 - updated each time the booking is saved
 - cannot be modified outside the booking – to transfer extra equipment (not short on the booking) you will need to enter a separate transfer

7. Transfers and Shortages

- When you enter a transfer to move equipment to a certain location, the stock will immediately become available at the destination.
- At the source they transfer may or may not create a shortage and this will need to be managed by those at the source location. You may check/uncheck the operator privilege in red below to allow/prevent transfers that will create a shortage at the 'transfer from' location. See Rentalpoint Security document at this link for more information on setting operator privileges <http://rentp.com/KnowledgebasePDFs/Rentalpoint%20Security.pdf>



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- On systems using 'first come first serve' (operational parameter #6) transfers at the source location will be reserved in the same way as regular bookings. I.e. As the bookings are entered, the stock is allocated.

For example:

- i. Booking A is enteredstock is allocated
- ii. Transfer is addedstock is allocated
- iii. Booking B is addedstock is allocated

The manage reservation window (accessible from Running Balance window) can be used to shift these shortages between bookings/transfers by changing the reservation dates.



RentalPoint Location Transfers

Running Balance - Shortages Exist

Product Code: MSR100 Description: 8" Powered Speaker - Yamaha MSR100 # brought forward: 68

Date	Time	Booking No.	Qty	Type	Balance	Date Reserved	Customer	P.O.#	Project Code	Sho
2015	10:00	FISK00010	+1	due back	67		Fisker Autor	ASDF		asdf
	10:00	HARMON00004	+1	Sub hire	68		Harmon's A	38		test
	17:27	HARMON00004	-1	Sub h r						test
JUN 12	10:09	BRIST00004	-1	Hire Co						
2015										
JUN 26	09:00	CHESABAR00031	-71	Hire Co						
2015										
JUN 27	09:00	CHESABAR00032	-10	Hire Co						
2015										
JUN 29	09:00	CHESABAR00033	-30	Hire Co						
2015	18:00	CHESABAR00032	+10	due ba						
JUN 30	18:00	CHESABAR00031	+71	due ba						
2015	18:00	CHESABAR00033	+30	due ba						
JUL 9	09:00	WOOLPERT00007	-1	Hire Co						
2015	09:00	WOOLPERT00008	-1	Hire Co						
JUL 10	18:00	WOOLPERT00008	+1	due ba						
2015										
JUL 17	09:00	AIRPUSH00007	-1	Hire Co						
2015										
JUL 18	18:00	AIRPUSH00007	+1	due ba						
2015										
JUL 28	15:00	WOOLPERT00009	-1	Hire Co						
2015	15:00	WOOLPERT00009	-1	Hire Co						
AUG 6	12:00	WOOLPERT00009	+1	due ba						
2015	12:00	WOOLPERT00009	+1	due ba						
AUG 19	08:00	GOLDMAN00007	-1	Hire Co						
2015										
SEP R	10:00	NFWCTIST00001	-1	Hire Co						

Management Reservations: Product: MSR100 8" Powered Speaker - Yamaha MSR100 28/07/15 to 06/08/15

Qty Booked	Qty Available	Qty Short	Booking	Date Reserved	Warehouse Out	Warehouse In	Ass
1	67	0	AIRPUSH00006		03/07/15 @ 09:00	27/07/15 @ 16:11	
1	67	0	AIRPUSH00008		22/07/15 @ 09:00	23/07/15 @ 18:00	
1	66	0	WOOLPERT00009	30/07/15 @ 09:07:39	29/07/15 @ 15:00	05/08/15 @ 12:00	
1	65	0	WOOLPERT00009	22/09/15 @ 15:02:21	29/07/15 @ 15:00	05/08/15 @ 12:00	

Switch Reservations Re-set Reservation Change Date Undo

Hide 'Out' Bookings

Region: 0 - Location: 0 - Toronto

Display Options Manage Reservations