

Virtual Carnet

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Overview

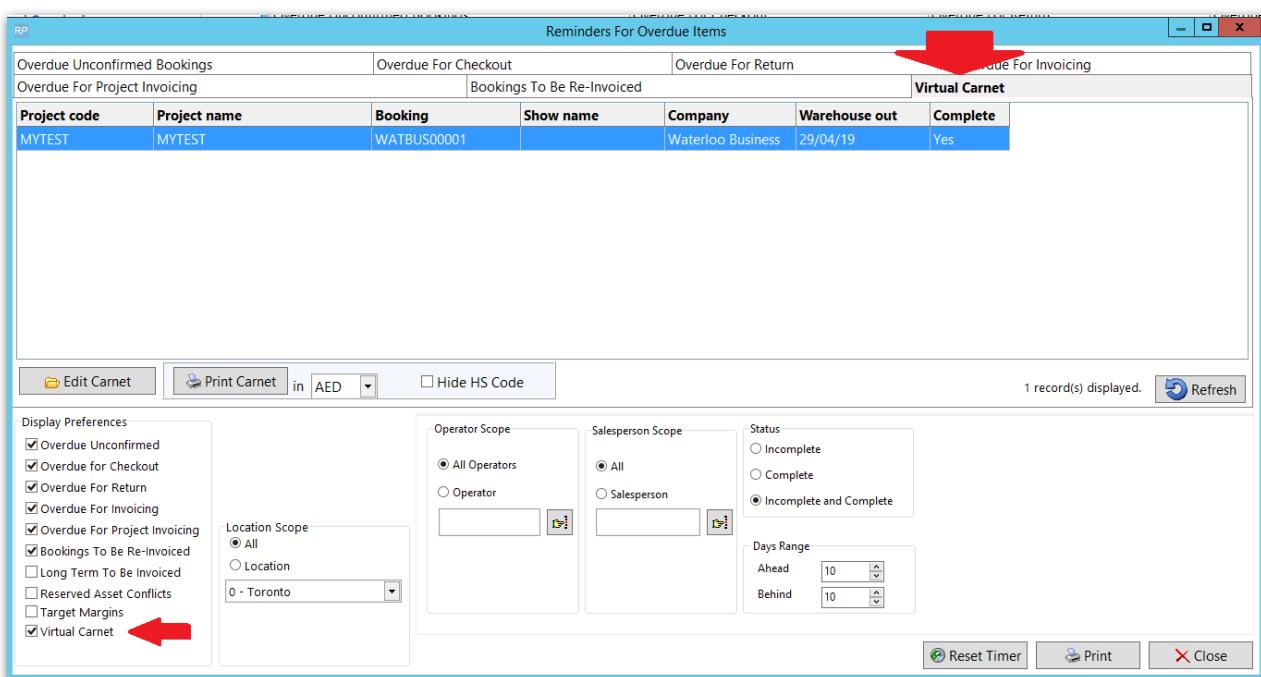
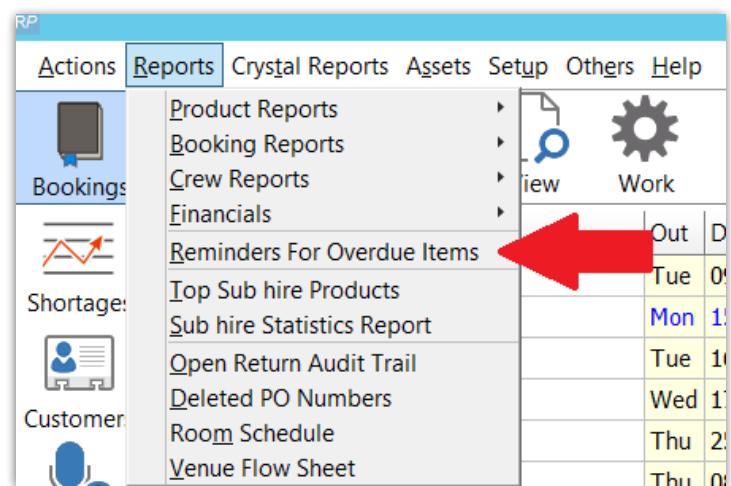
RentalPoint now offers functionality to build a Virtual Carnet for checked out bookings. Users can create a list of boxes/cases, allocate items to each case and either manually enter dimensions or have RentalPoint load dimensions from Inventory setup. Print the Carnet on completion for use as customs documentation when shipping internationally. Operator privileges control the level of user access to this functionality, here's how it works:

Accessing the Virtual Carnet

If you have trouble seeing this option, contact your RentalPoint administrator for the necessary permissions outlined in the 'Operator Privileges' section at the end of this article.



Once a booking has been checked out,
it will be available for Carnet build via the
'Reminder for Overdue Items' window via the left
main menu pane OR from the Reports menu



Once all items on the booking have been allocated to a box, the Carnet will be marked as Complete.

Reminders For Overdue Items

Overdue Unconfirmed Bookings		Job Reports	Target margins	Virtual Carnet		Complete Carnet
Project code	Project name	Booking /	Show name	Company	Warehouse out	
MYPYOJ	new project	EMAIL00051	The Test show	Email testing	08/02/19	No
		EMAIL00052	The Test show	Email testing	12/02/19	No
		TESTE00002		testing e	21/02/19	Yes
		ABC100094		abc company Ltd.	27/02/19	Yes
		EMAIL00053		Email testing	28/02/19	Yes

5 record(s) displayed.

Display Preferences

Overdue for Checkout
 Overdue For Return
 Overdue For Invoicing
 Overdue For Project Invoicing
 Bookings To Be Re-Invoiced
 Reserved Asset Conflicts
 Job Reports
 POs to be Reviewed
 Sub - Hire Review

Location Scope All Location

Operator Scope All Operators Operator

Project Man Scope All Salesperson

Status Incomplete Complete Incomplete and Complete

Days Range

Ahead Behind

Carnet Scope

From the Reminder for Overdue Items-->Virtual Carnet tab, highlight the booking and click 'Edit Carnet' (see accessing the Virtual Carnet above for further illustration).

Working with a Booking or Project

- Multiple reports (Trips) can be defined for each project (or booking). Select the project or booking you would like to work with.

1. Select Booking or Project

Single Booking

Project

- When building projects, a single booking for the project will be loaded (into the next window) at any given time, however all checked out bookings will be available during the build.
-

The screenshot shows the 'Virtual Carnet' software interface. On the left, a 'Bookings' list shows 'WATBUS00003' (highlighted with a red box and a red arrow) and 'WATBUS00004'. A red house icon is next to 'WATBUS00004' with the text 'lists all checked out bookings for the selected project'. The main area displays a table of bookings with columns: Code, Qty, Alloc, Barcode, and Description. The table contains items like 'NBM1-1', 'MSR100', 'NBM1-1', '3SPEAK', and '1AGUITA'. To the right, a 'Default Box' table shows a single row: 'Default Box - Case Containing: Box Value £ 0.00'. At the top right are 'Save' and 'Save' buttons.

Multi-User Editing

- Because locking only occurs at the Product Group level, Trips, Carnet boxes and Custom lines can be edited/added by any user. The current state will be loaded/saved immediately to and from the database.
- Choosing your scope of work**
 - All Booking items belong to a Product Group in Inventory. Booking items can only be added or removed from the Carnet boxes when the Product Group they belong to is not locked by other users working on the same booking. Choosing a single Product Group to work with on a Virtual Carnet allows other users to work on a different Product Group for the same Carnet at the same time. Only choose Edit All (locking all Product Groups for the booking) if no other user needs to work on the same Carnet during your session.

The dialog box is titled '2. Select Product Group'. It has a checkbox 'Edit All' and a dropdown menu 'Edit Product Group' set to 'AUDIO - Audio Equipment'.

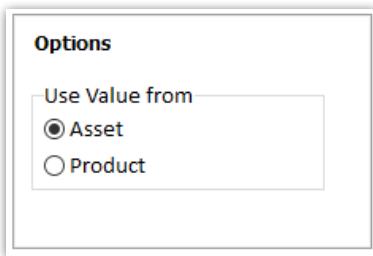
Single/Multi Trips

- Edit an existing trip or click the button in the 'Select Trip / Carnet' box to create a new trip. Click the button to apply the new trip name.
 - The Trip (report) can be deleted as long as it doesn't have any boxes/items attached by clicking the button.

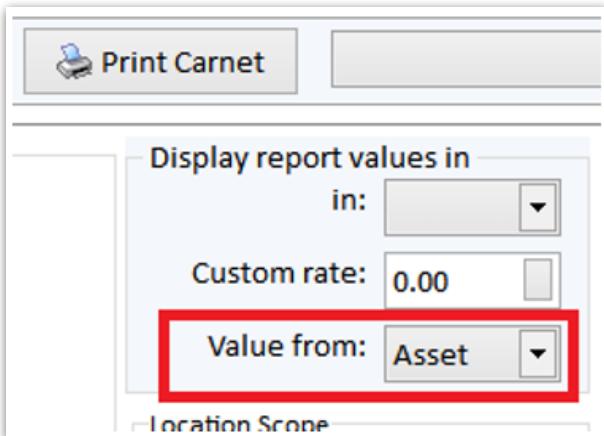
The dialog box is titled '3. Select Trip / Carnet'. It shows a dropdown '0 - New Trip' with a plus sign, a plus sign button, a minus sign button, and an 'Edit Trip Name' field containing 'Outbound' with a checkmark button.

Values used for Carnet

The value of the carnet boxes for asset tracked items can either be taken from the asset or the product by selecting the option in the edit carnet window



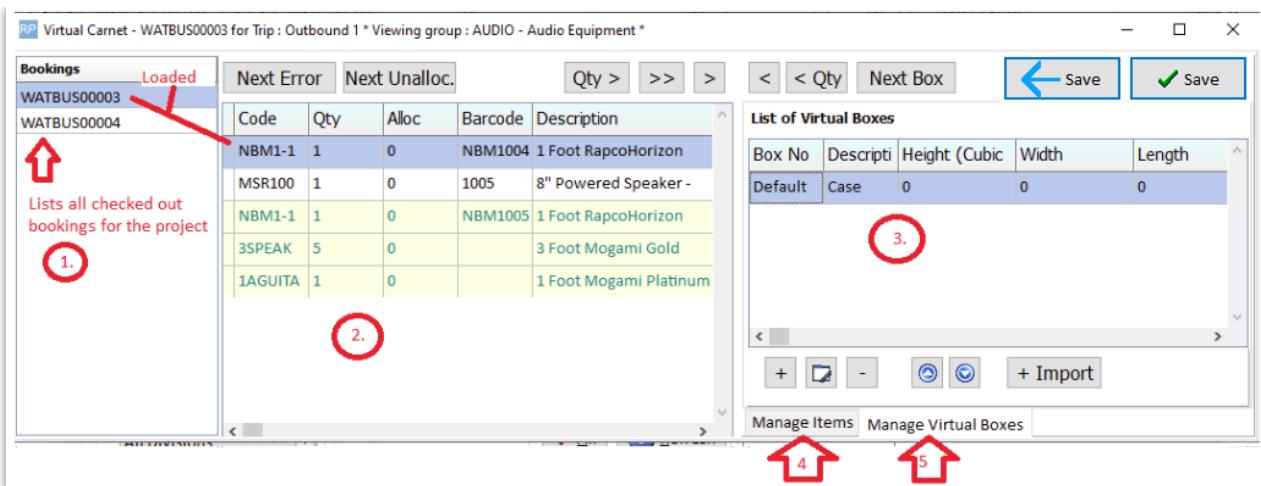
The value is also an option when printing the report.



Click  to proceed

The Virtual Window

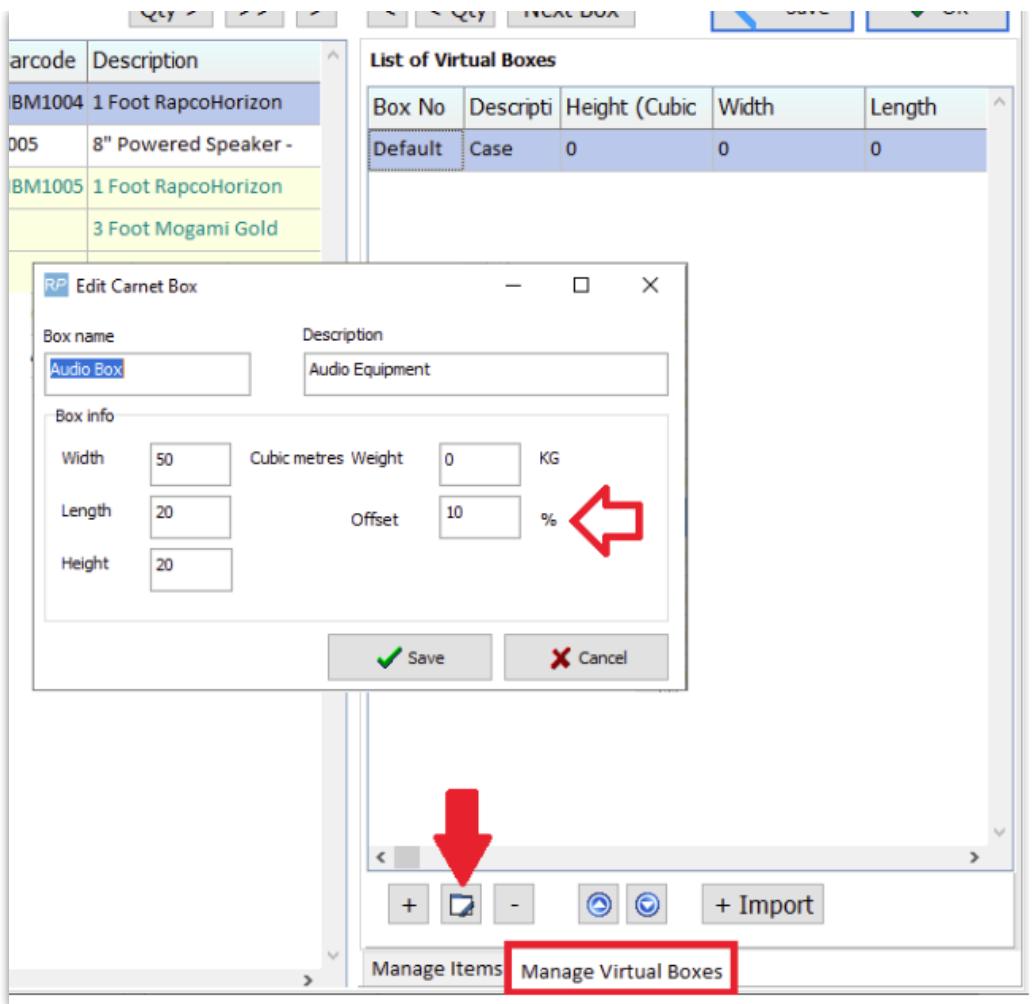
1. Once scope has been selected, checked out bookings for the project will display in the grid on the left side of the screen. If a single booking is selected, this panel is not needed and will not display.
2. Checked out items for the loaded booking will show in the next panel
3. The window on the right hand side will display a single default box initially
4. Add items to boxes from the 'Manage Items' tab
5. Configure Virtual Boxes via the 'Manage Virtual Boxes' tab



Manage Virtual Boxes

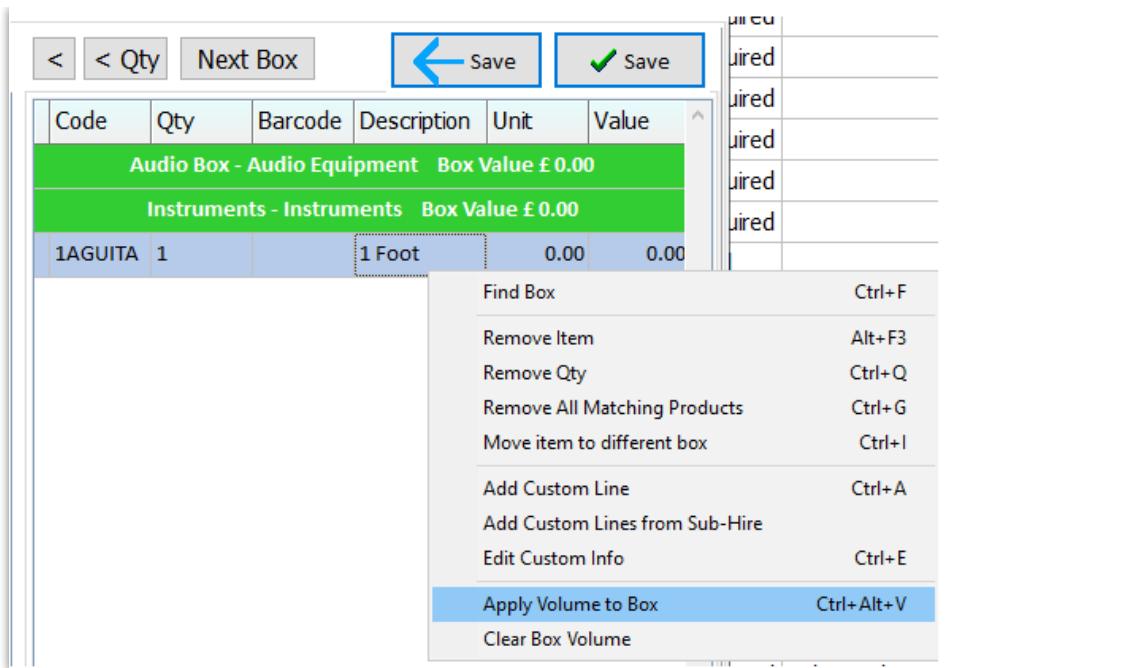
On the 'Manage Virtual Boxes' tab, click the edit button to enter/edit box information

	Add a new box
	Edit an existing box
	Remove a box
	Move a box up/down in the list
	Import boxes from spreadsheet

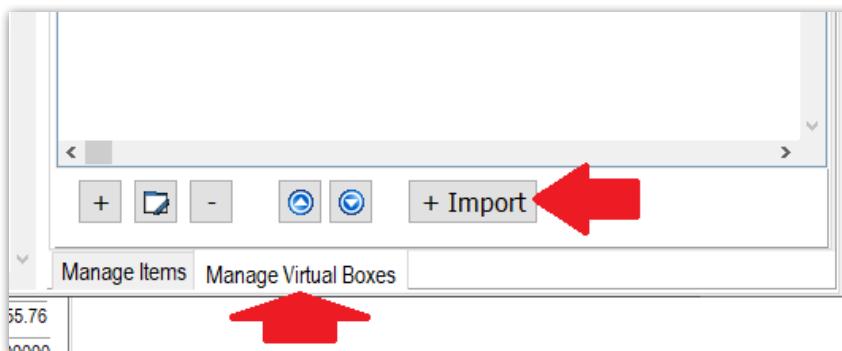


If the weight for the box is left at 0, the weight will be calculated based on the items within the box.

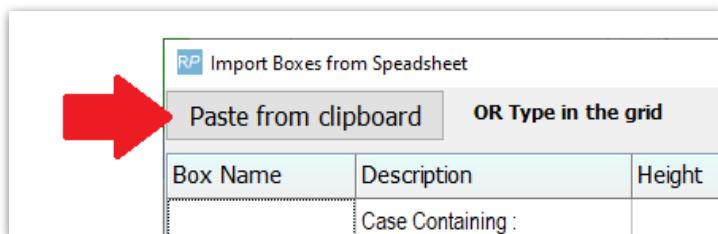
- The dimensions (width, length, height) can be entered here or we can pick an item within the box and apply its dimensions here (i.e. apply the dimensions of a road case).
- Offset % is displayed beside the box value when managing virtual boxes
- The volume of the box can be cleared (product untagged) by selecting the 'Clear Box Volume' option from the same menu.



Import Multiple Boxes



Choose 'Paste From Clipboard' to copy/paste from an Excel File



OR Enter a new box by adding a box name(s) in the grid provided (only lines with a box name will be added). Then click OK.

Import Boxes from Spreadsheet							OK	Cancel
Paste from clipboard		OR Type in the grid						
Box Name	Description	Height	Length	Width	Weight	Offset		
Cables	Cables	4	4	4	10	10		
Video	Video Monitor	6	6	3	50	10		
	Case Containing :							
	Case Containing :							
	Case Containing :							

Box No	Descripti	Height (Cubic	Width	Length	lbs
Instrument	Instrument	20	20	50	0
Audio Box	Audio	20	50	20	0
Cables	Cables	4	4	4	10
Video	Video	6	3	6	50

Manage Items/Adding items to a box

Select a box on the right side of the screen and use the arrow buttons to move items into it OR double click on the line or right click on the left grid and select from the menu options

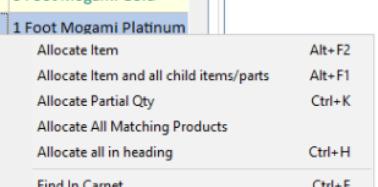
Virtual Carnet - WATBUS00003 for Trip : Outbound 1 * Viewing group : AUDIO - Audio Equipment *

Bookings	Next Error	Next Unalloc.	Qty >	>>	>	<	< Qty	Next Box	Save	Save
WATBUS00003									 Save	 Save
WATBUS0004										
	Code	Qty	Alloc	Barcode	Description					
	NBM1-1	1	0	NBM1004	1 Foot RapcoHorizon					
	MSR100	1	0	1005	8" Powered Speaker -					
	NBM1-1	1	0	NBM1005	1 Foot RapcoHorizon					
	NBM1-1	1	0	NBM1006	1 Foot RapcoHorizon					
	3SPEAK	5	0		3 Foot Mogami Gold					
	1AGUITA	1	1		1 Foot Mogami Platinum					

Instruments - Instruments Box Value £ 3000.00

Code	Qty	Barcode	Description	Unit	Value
1AGUITA	1		1 Foot	3000.00	3000.00

Audio Box - Audio Equipment Box Value £ 0.00 (Offset value 10%)


Allocate Item Alt+F2
Allocate Item and all child items/parts Alt+F1
Allocate Partial Qty Ctrl+K
Allocate All Matching Products
Allocate all in heading Ctrl+H
Find In Carnet Ctrl+F
Exclude >

 Manage Items Manage Virtual Boxes

Progress:

- The **Alloc** column will display the number allocated
- The **Alloc** column will show green in colour if the line is complete
- The box value (outlined below) is updated as you move items into it.

03 for Trip : Outbound 1 * Viewing group : AUDIO - Audio Equipment *

Next Error Next Unalloc.					Qty >	>>	>	<	< Qty	Next Box	Save	Save
Code	Qty	Alloc	Barcode	Description								
NBM1-1	1	0	NBM1004	1 Foot RapcoHorizon								
MSR100	1	0	1005	8" Powered Speaker -								
NBM1-1	1	0	NBM1005	1 Foot RapcoHorizon								
NBM1-1	1	0	NBM1006	1 Foot RapcoHorizon								
3SPEAK	5	0		3 Foot Mogami Gold								
1AGUITA	1	1		1 Foot Mogami Platinum								

Qty >	Move only part of a line (you can use this if you need to split a line between different boxes).
>>	Move an item along with its parts: click on the parent or part item and click the >> button
>	Move a line item
Next Error	Move to next error in the carnets (errors can appear with gear returned to the booking that needs to be removed from the carnets. This button will move to the next unallocated line if no errors are found.
Next Unalloc.	Move to the next unallocated line

Roadcase Entry Order

Items will now always be placed into the carnets box in the same order as in the booking, regardless of the order selected by the user.

Sub Hires/ Cross Rentals

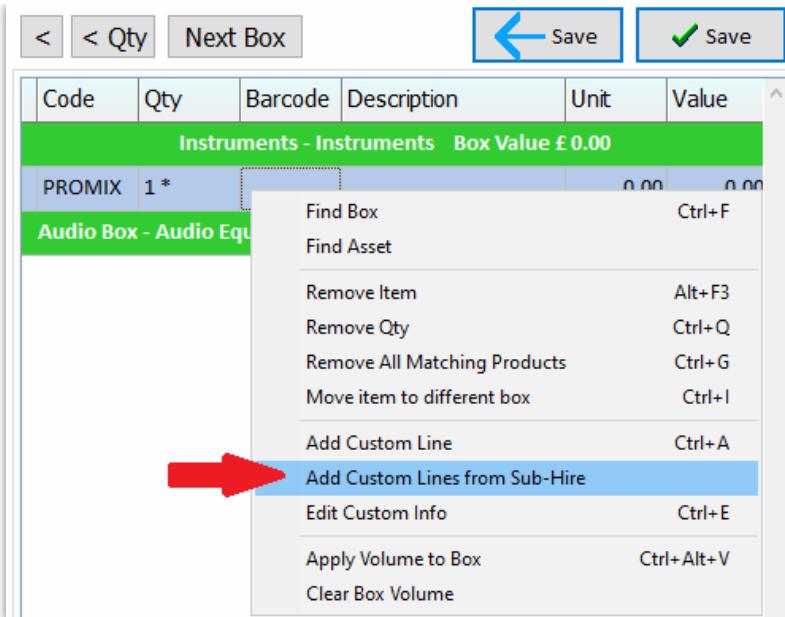
Lines in the carnets that have a * next to the qty when added to a virtual box indicate that the line is a sub rental.

04 for Trip : Outbound 1 * Viewing group : AUDIO - Audio Equipment *

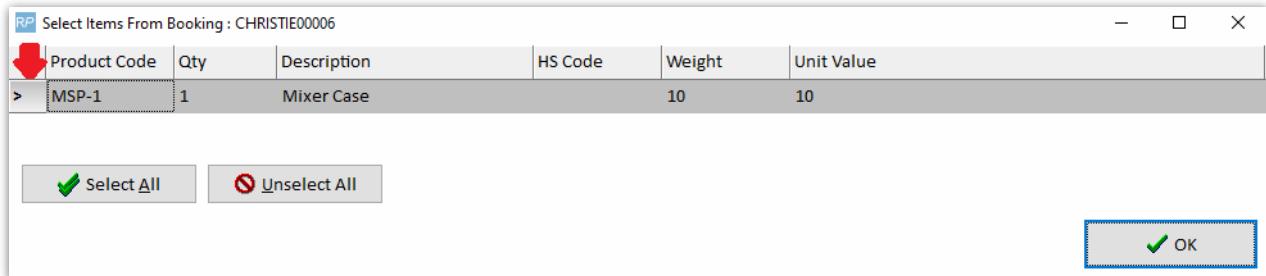
Next Error Next Unalloc.					Qty >	>>	>	<	< Qty	Next Box	Save	Save
Code	Qty	Alloc	Barcode	Description								
PROMIX	1	1										
NBM1-1	1	0	NBM1003	1 Foot RapcoHorizon NBM1 XLR								
MSR100	1	0	100819	8" Powered Speaker - Yamaha								
3SPEAK	5	0		3 Foot Mogami Gold Speaker								
1AGUITAR	1	0		1 Foot Mogami Platinum Guitar								

Right-click on the item and select 'Add Custom Lines from Sub hire'.

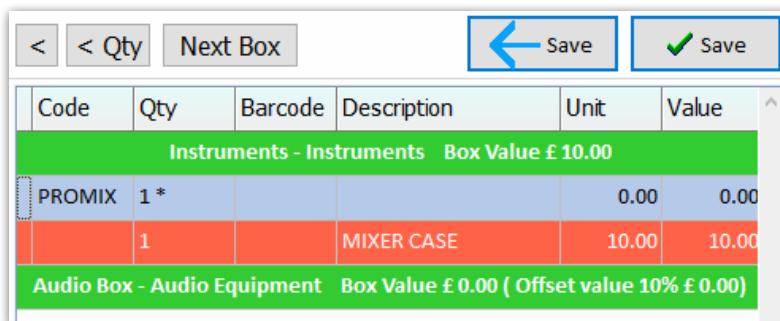
- This will display any extra items from the sub hire PO that don't have a corresponding item on the booking. These can be added as custom lines. (Note: if you select 'Add custom lines from a sub hire' on a line without an * you can select from a list of all the sub hires on the booking)



Check the items you want to add and click OK



The item has been added but currently displays in red. Double click on the line to add the needed information.



Field in RED must be populated. The HS Code is missing for this item so it needs to be entered here.

Description			<input checked="" type="checkbox"/>	<input type="checkbox"/>
MIXER CASE				
HS Code	Qty	Value		
<input type="text"/>	<input type="text"/> 1	<input type="text"/> 10.00		
Weight	Height	Width	Length	
<input type="text"/> 10.00000	<input type="text"/> 6.00	<input type="text"/> 6.00	<input type="text"/> 2.00	
Country of Origin	Serial #			
<input type="text"/>	<input type="text"/>			

When a generic item is added to a box it will show in red as well indicating there is more information needed. Double click to edit it like a custom line and enter the missing information.

MIC		1	MIC10	microphone - L3982 - noise cancelling	25.00	25.00
TL200 - Case Containing : Box Value £ 37.00						
MIC	1				25.00	25.00
GEN	4			Generic Video	3.00	12.00
TL300 - Case Containing : Box Value £ 25.00						

Essential information for custom/sub hire or generic lines include HS Code, Description and weight. If any custom line types are missing this information the 'Complete' status will show as NO.

 The Harmonized Commodity Description and Coding System, HS Code for short, is a common standard worldwide for describing the type of commodity that is shipped. Every commodity that enters or crosses most international borders has to be declared to customs using this code. Thus, the code helps to standardize and identify cargo in the same manner whether it is in Singapore, Mali or Rotterdam. For Inventory items the HS Code is stored against the Product under the 'unit specifications' tab.

Description			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Generic Video				
HS Code	Qty	Value		
<input type="text"/>	<input type="text"/> 4	<input type="text"/> 3.00		
Weight	Height	Width	Length	
<input type="text"/> 0.00000	<input type="text"/> 0.00	<input type="text"/> 0.00	<input type="text"/> 0.00	
Country of Origin	Serial #			
<input type="text"/>	<input type="text"/>			

Custom Lines

To enter a custom line not associated with a sub hire, right click and select 'Add Custom'

TL400 - Case Containing : Box Value £ 50.00						
MIC	1	MIC17	microphone - L3982 - noise cancelling	25.		
MIC	1	MIC19		25.		
STAND	1			0.0		
LED-PAN	2 *			0.0		
	1			0.0		
			Find Box	Ctrl+F		
			Remove Item	Alt+F3		
			Remove Qty	Ctrl+Q		
			Remove All Matching Products	Ctrl+G		
			Move items to different carnets	Ctrl+I		
			Add Custom Line	Ctrl+A		
			Add Custom Lines from Sub - Hire			
			Edit Custom Info	Ctrl+E		
			Apply Volume to Box	Ctrl+Alt+V		

Then enter the details

Description

HS Code Qty Value

Weight Height Width Length

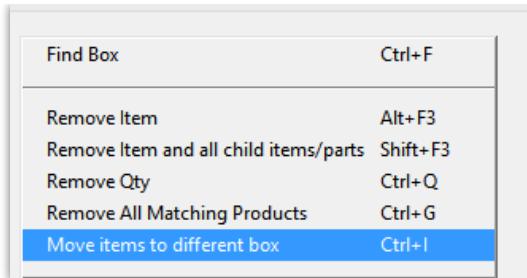
Country of Origin Serial #

Re-Ordering Items

Items can be re-ordered within the box or dragged to another box. First click the item to highlight it, then hold the mouse down to drag the item (you will notice a green arrow appears as you move the item)

						Save	Save		
Code	Qty	Barcode	Description	Unit	Value				
Instruments - Instruments Box Value £ 0.00									
Audio Box - Audio Equipment Box Value £ 0.00 (Offset value 10% £ 0.00)									
	0		MIXER CASE	10.00	0.00				
ROMIX	1 *			0.00	0.00				

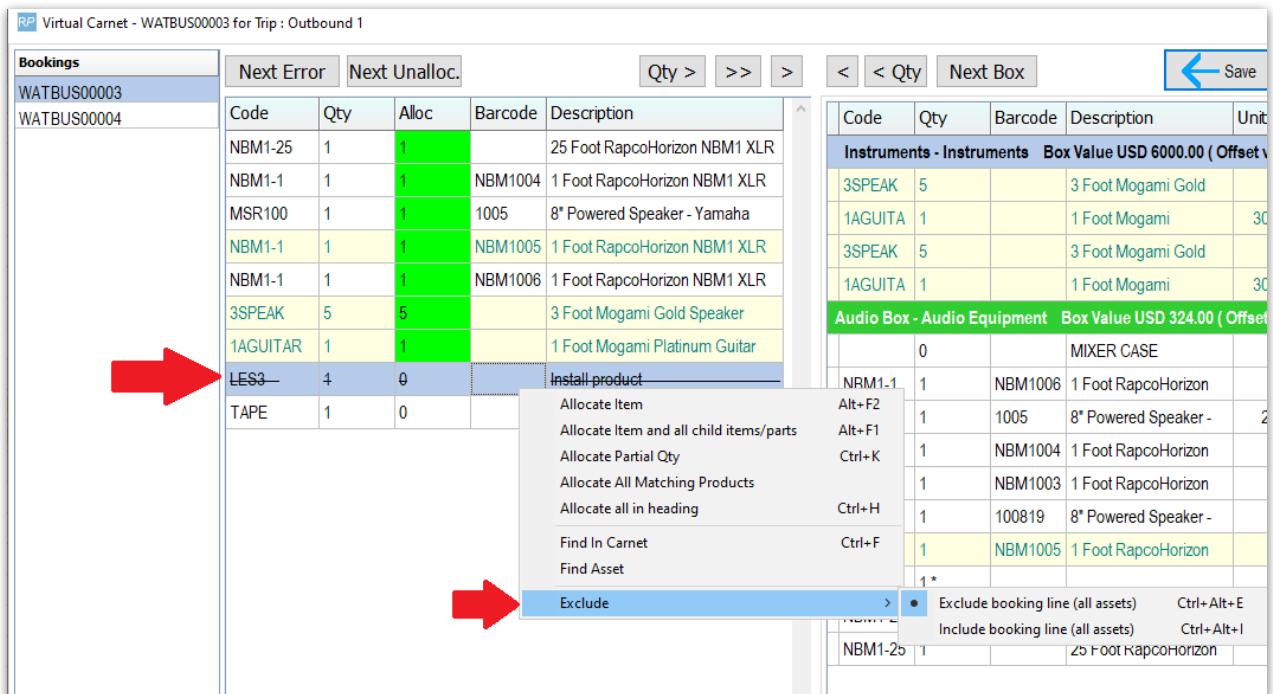
Items can also be moved to a different box by right-clicking on the line and selecting / move items to different box



Exclusions

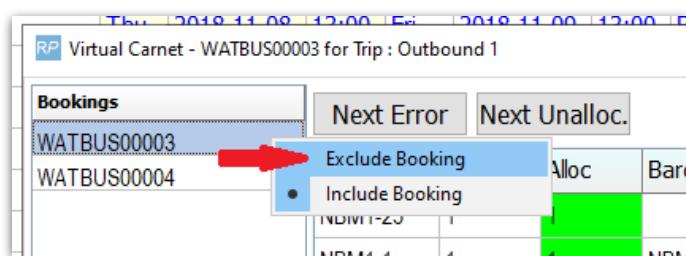
Specific lines in a booking can be marked as 'excluded' from the carnets, so it can't be added to the report and won't be counted in the '**Carnet** complete' calculation.

To exclude a line, right click on a row in the booking/left side grid and select 'Exclude booking line' from the exclude sub menu. This will affect all the assets associated with the particular booking line.



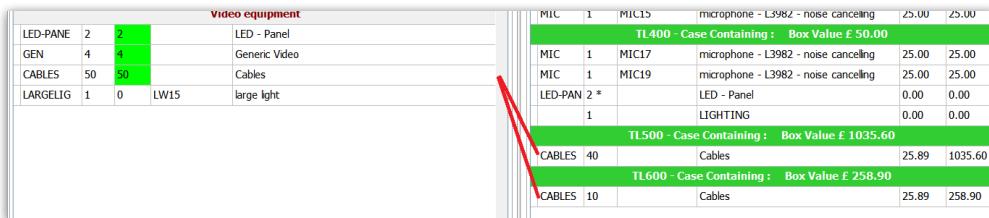
An entire booking can also be excluded from a project.

Right-click on the left side booking list and select 'Exclude Booking' from the menu.



Managing Returned Items

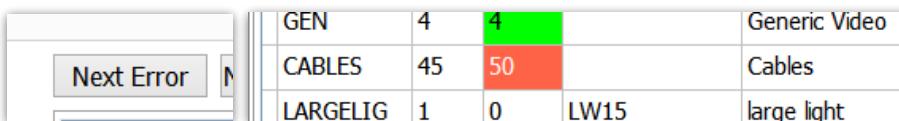
If asset tracked items are returned, they will automatically be removed from the carnets. Non-tracked items that have more than one quantity on the line must be adjusted manually. In the example below 50 cables have been broken up between two boxes.



Video equipment				TL400 - Case Containing : Box Value £ 50.00				
LED-PANE	2	2		LED - Panel				
GEN	4	4		Generic Video				
CABLES	50	50		Cables				
LARGELIG	1	0	LW15	large light				
				TL500 - Case Containing : Box Value £ 1035.60				
				MIC	1	MIC15	microphone - L3982 - noise canceling	25.00 25.00
				MIC	1	MIC17	microphone - L3982 - noise canceling	25.00 25.00
				MIC	1	MIC19	microphone - L3982 - noise canceling	25.00 25.00
				LED-PAN 2 *		LED - Panel		0.00 0.00
					1	LIGHTING		0.00 0.00
				TL600 - Case Containing : Box Value £ 258.90				
				CABLES	40	Cables		25.89 1035.60
				CABLES	10	Cables		25.89 258.90

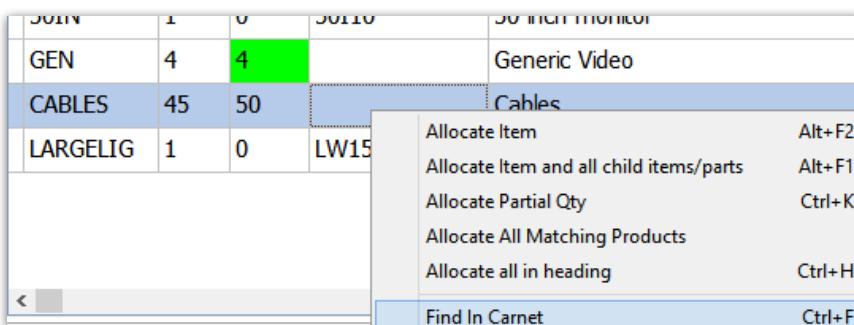
After returning 5 cables the 'Complete' status of the carnets will be set to 'No'

When editing the carnets, click 'Next Error' to find the line that has too many items allocated

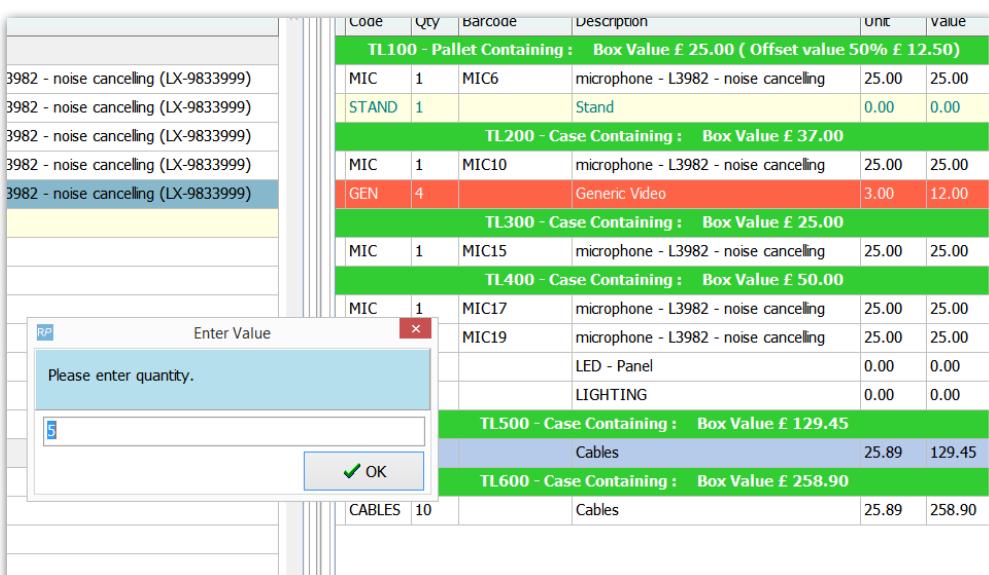


GEN	4	4		Generic Video
CABLES	45	50		Cables
LARGELIG	1	0	LW15	large light

Right click on the line and select the 'Find in Carnet' option to find the box it's in.



Code	Qty	Barcode	Description	Unit	Value
TL100 - Pallet Containing : Box Value £ 25.00 (Offset value 50% £ 12.50)					
3982 - noise cancelling (LX-9833999)			MIC	1	MIC6
TL200 - Case Containing : Box Value £ 37.00					
3982 - noise cancelling (LX-9833999)			MIC	1	MIC10
3982 - noise cancelling (LX-9833999)			GEN	4	Generic Video
TL300 - Case Containing : Box Value £ 25.00					
3982 - noise cancelling (LX-9833999)			MIC	1	MIC15
TL400 - Case Containing : Box Value £ 50.00					
3982 - noise cancelling (LX-9833999)			MIC	1	MIC17
TL500 - Case Containing : Box Value £ 129.45					
3982 - noise cancelling (LX-9833999)			CABLES	40	Cables
TL600 - Case Containing : Box Value £ 258.90					
3982 - noise cancelling (LX-9833999)			CABLES	10	Cables



Code	Qty	Barcode	Description	Unit	Value
TL100 - Pallet Containing : Box Value £ 25.00 (Offset value 50% £ 12.50)					
3982 - noise cancelling (LX-9833999)			MIC	1	MIC6
TL200 - Case Containing : Box Value £ 37.00					
3982 - noise cancelling (LX-9833999)			MIC	1	MIC10
3982 - noise cancelling (LX-9833999)			GEN	4	Generic Video
TL300 - Case Containing : Box Value £ 25.00					
3982 - noise cancelling (LX-9833999)			MIC	1	MIC15
TL400 - Case Containing : Box Value £ 50.00					
3982 - noise cancelling (LX-9833999)			MIC	1	MIC17
TL500 - Case Containing : Box Value £ 129.45					
3982 - noise cancelling (LX-9833999)			CABLES	40	Cables
TL600 - Case Containing : Box Value £ 258.90					
3982 - noise cancelling (LX-9833999)			CABLES	10	Cables

Click the < Qty button to remove the extra items and correct the error.

Completing the Carnet

	saves the carnets and moves the user back to the previous screen
	located at the bottom of the first screen will check to see that all items from the booking have been allocated to the carnets (or excluded by a user)

If you're having trouble completing the carnets due to errors, try the following:

1. Ensure all generic items and sub rentals have been assigned an HS Code.
2. Remove any non-tracked returned items from the carnets (barcoded items are removed automatically)
3. Ensure all items have been allocated - try using 'Edit All' to locate hidden items if needed.

Printing the Carnet

First ensure that the Virtual Carnet.frtpl (or custom fast report) has been installed in Setup -> Fast Report menu

contact support@rentp.com if you have trouble finding this report. You'll also need operator privileges, contact your RentalPoint system administrator or see 'Operator Privileges' section below for more details.

Setup Fast Reports			
Report Name	Report Type	Stored Procedure	Report Status
Asset Trail report	Audit Trail General	Frp_Report_AssetTrail	Custom
Audit Trail General Report - Default	Audit Trail General	Frp_Report_AuditTrailGeneral	Default
Booking Hardcopy with Group - Default	Booking Hardcopy	Frp_Report_PickList	Default
Rentalpoint Picklist Booking Hardcopy	Booking Hardcopy	Frp_Report_PickList	Default
Virtual Carnet	Carnet for Reserved Assets	Frp_Report_VirtualCarnet	Custom
Collection Docket (CD)- Default	Collection Docket	Frp_Report_InvoiceCD	Default

From the 'Reminder for Overdue Items' window:

1. Select a booking/project
2. Select the report values

1. Select the currency the report should appear in
2. Entering a value in the Custom Rate box before printing the report will override the fixed currency rate and apply the chosen rate to all prices.
3. Choose to show values on the report from the Product or Asset record.
4. Click to hide/show the HS Code on the report
4. Click the 'Print Carnet' Button

RP Reminders For Overdue Items

Overdue Unconfirmed Bookings		Overdue For Checkout		Overdue For Return		Overdue For Invoicing	
Overdue For Project Invoicing		Bookings To Be Re-Invoiced		Cycle billed To Be Invoiced		Reserved Asset Conflicts	
Target margins		Virtual Carnet					
Project code	Project name	Booking	Show name	Organization	Warehouse out		
MSC2019	Music Conference 2019	1. WATBUS00003	Gibson Wedding	Waterloo Business	19/10/22		
MSC2019	Music Conference 2019	2. WATBUS00004	MyShow	Waterloo Business	19/10/22		

4.

1.

2.

3.

4.

2 record(s) displayed.

Save to CSV

To Save the report to a csv or PDF file, first print the Carnet as outlined above, then click Display.

Fast Report Template List - EMAIL00053

Report name: Virtual Carnet

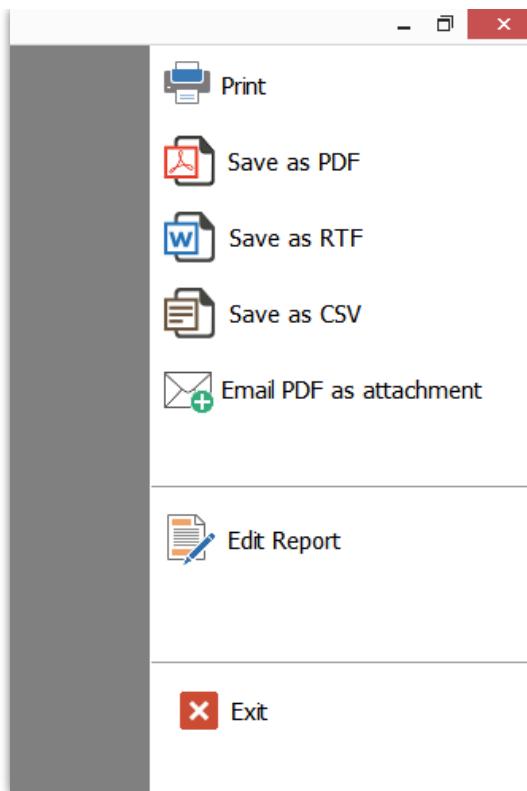
Print

Display

Report settings

Exit

Then choose from the options on the right side of the window.



Once saved to a file the carnets will be attached to the project or booking in the job reports folder.

Operator Privileges

'Can Edit virtual Carnet' - allows the user to add/remove items from the carnets

RP Edit Group Record : ADMINISTRATOR

Group Name	Bookings	Sub - Hires and Transfers	Customers and Vendors	Products and PO's	Reports	Printing Options	Setup and Utilities	Contact Management Access	Other	Other
Availability										
<input checked="" type="checkbox"/> View Shortage List										
<input checked="" type="checkbox"/> View Running Balance										
<input checked="" type="checkbox"/> View Plot Sheet										
<input checked="" type="checkbox"/> Manage Reservations										
Other										
<input checked="" type="checkbox"/> Late Pickups										
<input checked="" type="checkbox"/> Lay Days and Rostered Days Off										
<input checked="" type="checkbox"/> Show Credit Card Number										
<input checked="" type="checkbox"/> Allow Access To Project Manager Field In										
Booking and Customer										
<input checked="" type="checkbox"/> Can Change Reviewed Status										
<input checked="" type="checkbox"/> Access 'POs to be Reviewed' Report										
<input checked="" type="checkbox"/> Can View 'Followup' Tab										
<input checked="" type="checkbox"/> Can Edit Virtual Carnet										
Custom Templates										
<input checked="" type="checkbox"/> Add Template										
<input checked="" type="checkbox"/> Open Template										
<input checked="" type="checkbox"/> Remove Template										
<input checked="" type="checkbox"/> Modify Custom Template										
Venues										
<input checked="" type="checkbox"/> Add Venues										
<input checked="" type="checkbox"/> Edit Venues										
<input checked="" type="checkbox"/> Delete Venues										
Truck Scheduling										
<input checked="" type="checkbox"/> Can Add Trucks										
<input checked="" type="checkbox"/> Can Update Trucks										
<input checked="" type="checkbox"/> Can Delete Trucks										
Attachments										
<input checked="" type="checkbox"/> Can Open Quotes / Custom / Invoices / Purchase Orders / Cross Rentals										
Can Open Booking Hardcopy / Packing										
<input checked="" type="checkbox"/> Lists / Collection Dockets / Return Receipts										
<input checked="" type="checkbox"/> Can Open Documents in Others Folder										
Delivery										
<input checked="" type="checkbox"/> Can Update Delivery										
<input checked="" type="checkbox"/> Can Delete Delivery										
Labor										
<input checked="" type="checkbox"/> Can Add Labor										
<input checked="" type="checkbox"/> Can Update Labor										
<input checked="" type="checkbox"/> Can Delete Labor										

'Can Print Virtual Carnet' - Allow users to print the carnets

Group Name	Bookings	S
Reports	Printing Options	

Printing

- Print Customer Labels
- Print a Booking Hardcopy
- Print Custom [Using a Tem
- Print Account Statements
- Print Delivery and Return S
- Print a Custom Invoice
- Print Delivery Sheet
- Print an Invoice
- Can Change Invoice Date
- Print a Roadcase
- Print a Purchase Order
- Can Print Virtual Carnet