

[TEST] Current RMS: October's monthly roundup

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Fri 11/10/2019 12:15

To:



Monthly Roundup

What's new this October?

Whether you call it “Fall” or “Autumn,” or even if you're heading into Spring right now, we've a bumper batch of Current RMS goodies for you to start the season.

Update all service dates in an opportunity group 📅

So you did a job last year and the customer wants the same thing this year – great! You clone the opportunity in Current, change the dates, tweak some of the prices then... uh oh, looks like all of your service dates are still set to last year.

No need to add each service line one-by-one any more. We've added a new option to opportunity groups that lets you change the date for all services in that group.

To get started, edit an opportunity group to set default dates for services in the group. You can even copy dates from the scheduler using the handy button here.

Dashboard People & Organizations **Opportunities** Resources Activities Reports Michael McGovern Headquarters

Edit Opportunity Item

Independent movie: "Thoughts"

Default Service Dates

Start Date

09-14-2020 9:00 AM

Update Existing Service Items

09-14-2020 4:00 PM Copy from Schedule

Update Opportunity Item Cancel

Description

The dates you set will apply to new services that you create in the group. Tick the new “Update Existing Service Items” checkbox to copy the group dates to any existing services in the group, too.

As part of this, we also update rate quantities and cost rate quantities where rate types are set to day or hour. We’ll display a message to let you know when this has happened.

Prepare and book out an entire container 🚚

One of the things that came out of conversations about temporary containers was that folks wanted a simple way to set a container on an opportunity, then scan to book that container out.

Now you can do just that. Once you’ve set a container, prepare and book out everything in a container by scanning or typing the container name. This works even if you’re not using serialized containers.

Temporary containers 📦

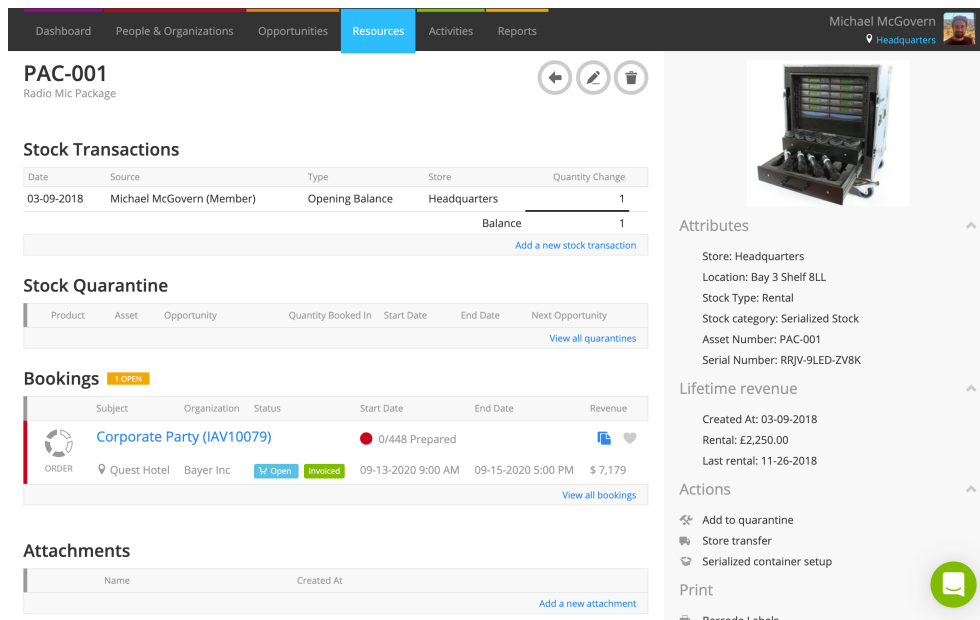
Nothing beats hearing how you use our features in the real world and we’ve made a bunch of improvements to temporary containers thanks to you.

- We changed the way container component allocation works, so that now we try to allocate container components that are accessories first.
- On this note, we also made some changes to the way permanent containers are allocated to make it more consistent with temporary containers.

- You may now allocate a temporary container when its product is set up as accessory only.
- We clarified the text on the Serialized Containers screen when no containers exist.
- On the stock level page for bulk stock levels, we now show the quantity that's been added to temporary containers in the sidebar.

Stock level images

You've always been able to upload a picture against products. Now you can do the same for stock levels. This is ideal when a stock level is a temporary or permanent container, letting you add a picture of the container as configured.



PAC-001
Radio Mic Package


Stock Transactions

Date	Source	Type	Store	Quantity Change
03-09-2018	Michael McGovern (Member)	Opening Balance	Headquarters	1
Balance				1

Stock Quarantine

Product	Asset	Opportunity	Quantity Booked In	Start Date	End Date	Next Opportunity
View all quarantines						

Bookings 1 OPEN

Subject	Organization	Status	Start Date	End Date	Revenue
 Corporate Party (IAV10079)	Quest Hotel	Q/448 Prepared	09-13-2020 9:00 AM	09-15-2020 5:00 PM	\$ 7,179

Attachments

Name	Created At
Add a new attachment	

Attributes

- Store: Headquarters
- Location: Bay 3 Shelf 8LL
- Stock Type: Rental
- Stock category: Serialized Stock
- Asset Number: PAC-001
- Serial Number: RRJV-9LED-ZV8K

Lifetime revenue

- Created At: 03-09-2018
- Rental: £2,250.00
- Last rental: 11-26-2018

Actions

- Add to quarantine
- Store transfer
- Serialized container setup

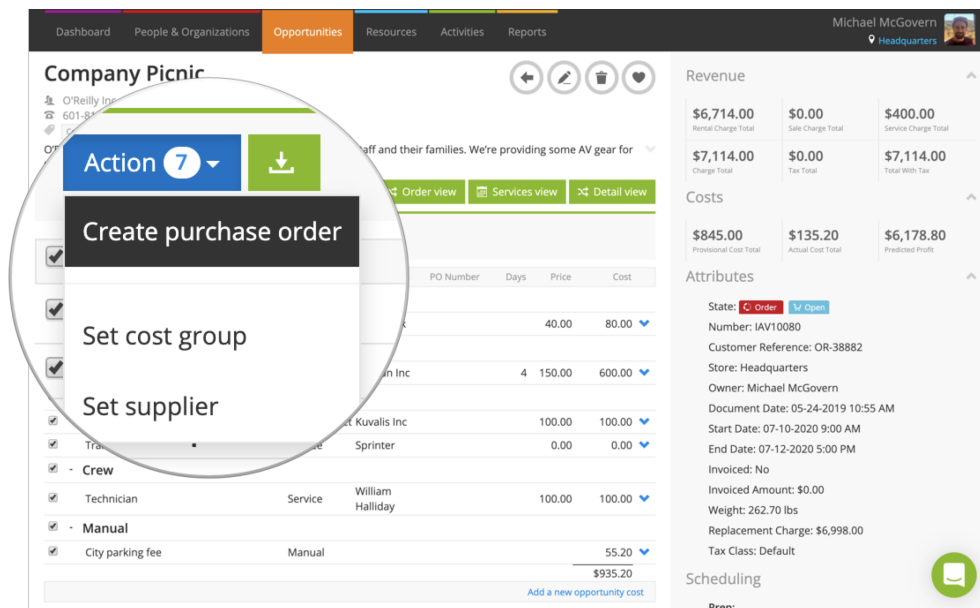
Print

[Barcode Labels](#)

Purchasing beta available for all

Thanks to everyone who was part of our first wave of beta testers for purchasing – we had some really useful feedback. This month, we made our purchasing beta available for all.

This means that everyone can now create and manage purchase orders straight from opportunities in Current RMS.



It's still in beta, which means that we're actively working on new features for it. Everything that we have developed so far is stable and ready-to-rely on, and we'll be adding features like accounting integrations and sales stock ordering in the future.

Learn more about what's included and what's next [on our guides](#).

New role option for Reports 🧑🏫➡️

Previously, only admin users had access to Reports. We've added a new role option so that you can give non-admins access to Reports, too.

Purchase order API endpoints 🧐

For our developer community, we added read-only support for purchase orders to our API. Hop over to [our API documentation](#) to get started.

Our new wishlist ✨

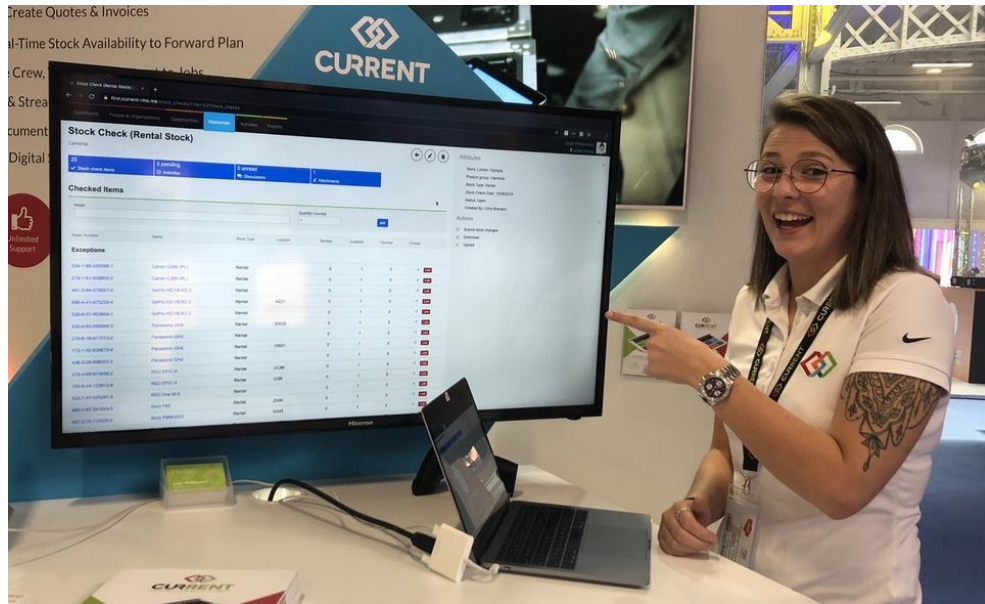
We gave our wishlist some much needed love and it's better than ever. Behind the scenes, it links to our messenger, email, and other systems so we have a complete picture of what's important to you.

Learn more [on our blog](#) or check out [our new wishlist](#).

Psst... here's a sneak peek of stock check 📋

Whether you wait until one quiet week or you do it batch-by-batch throughout the year, stock take is something that every rental business does.

Well, take stock of this! We're working on a stock check module to make it much easier to audit your stock. Scan through your gear, then let Current RMS tell you about discrepancies and adjust your stock levels.



We're putting the final touches to it at the moment and hope to have it in your hands in time for the next Monthly Roundup email.

PLASA London

✔ Florida, USA. ✔ Melbourne, Australia. ✔ London, UK. We ticked another city off our list this month, bringing Current RMS to London for PLASA 2019.

Thanks to all who stopped by. It was great to catch up with new and old customers, as well as showing Current to new businesses.

Still got Questions?
We'll be happy to help:
help@current-rms.com

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