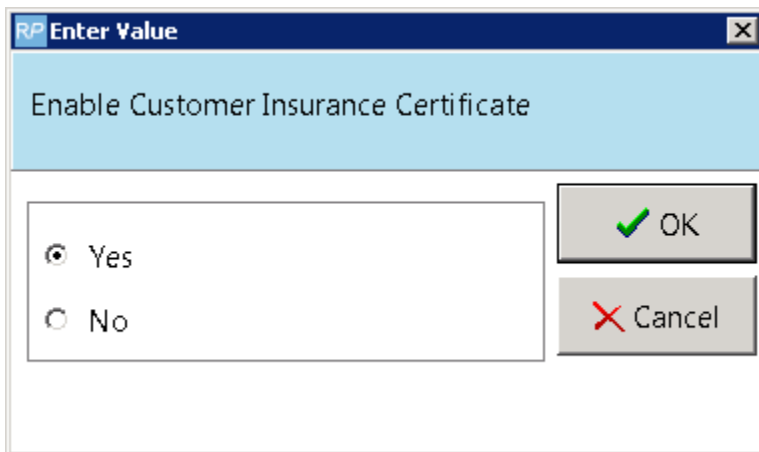# Customer Insurance Certificate

1   Customer Insurance Certificates in Rentalpoint

Rentalpoint provides the functionality to track valid customer insurance certificates AND prevent bookings from being checked out without them. This functionality is activated via use of parameter settings in Rentalpoint AND managed for access via Operator Privileges.

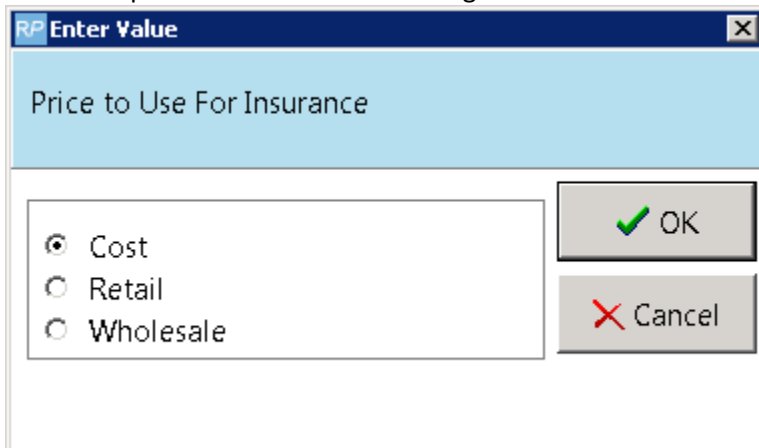# 2   Setting up Rentalpoint to Track Customer Insurance Certificates

2.1   Turning on Insurance Parameter

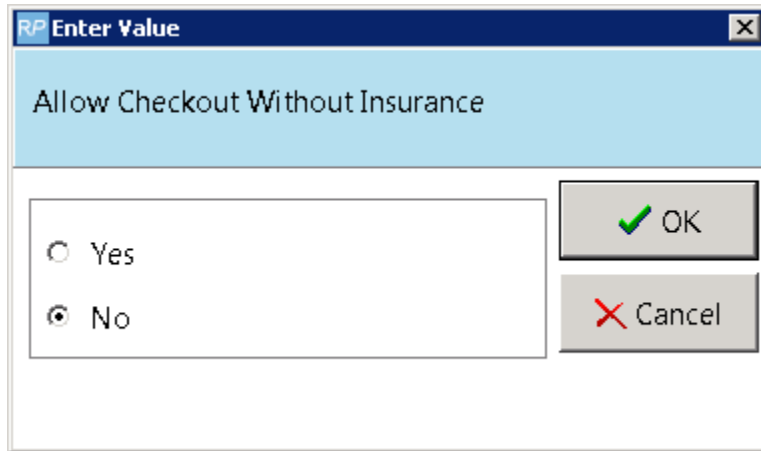1.   Goto Setup→parameters→operational→146 'Enable Customer Insurance Certificate'

2.   Select the price to use when calculating insurance certificate coverage
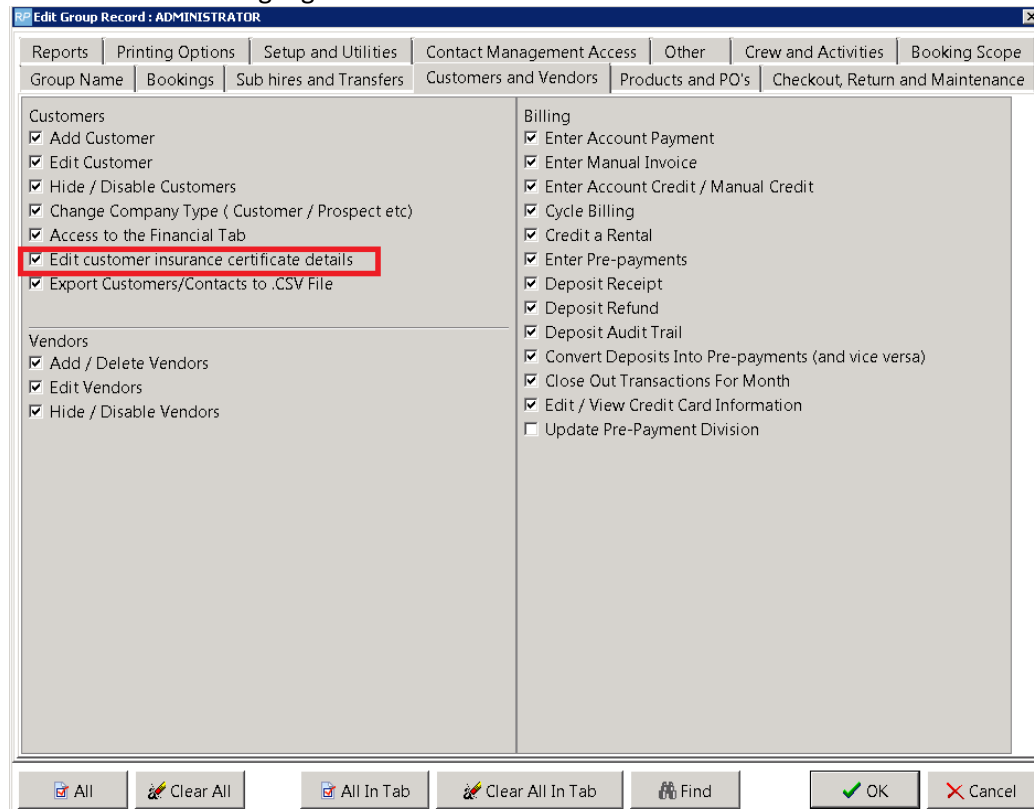
3.   Allow checkout of Booking with or without insurance certificate

4. After every change to Parameter file, you must log out of Rentalpoint and back in again to see the effect of the change.
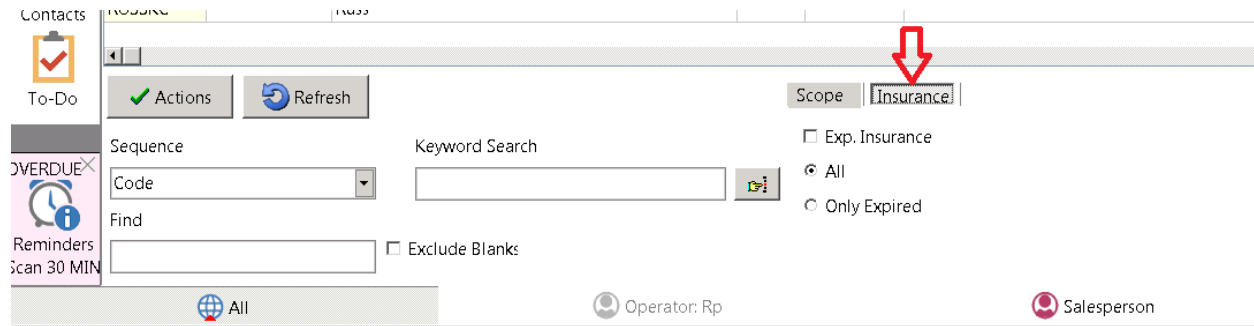
2.2 Setting Operator Privileges

1. Goto Setup→Operators→Customers & Vendors
2. Click the checkbox highlighted below to allow access to maintain insurance details

3 Customer Insurance Certificates in the Customer Record

On the customers menu, search for customers with expired insurance via specific scope options.

Maintain customer insurance details via 'Insurance' tab of customer record.
Confirmed bookings will show in the lower part of the screen
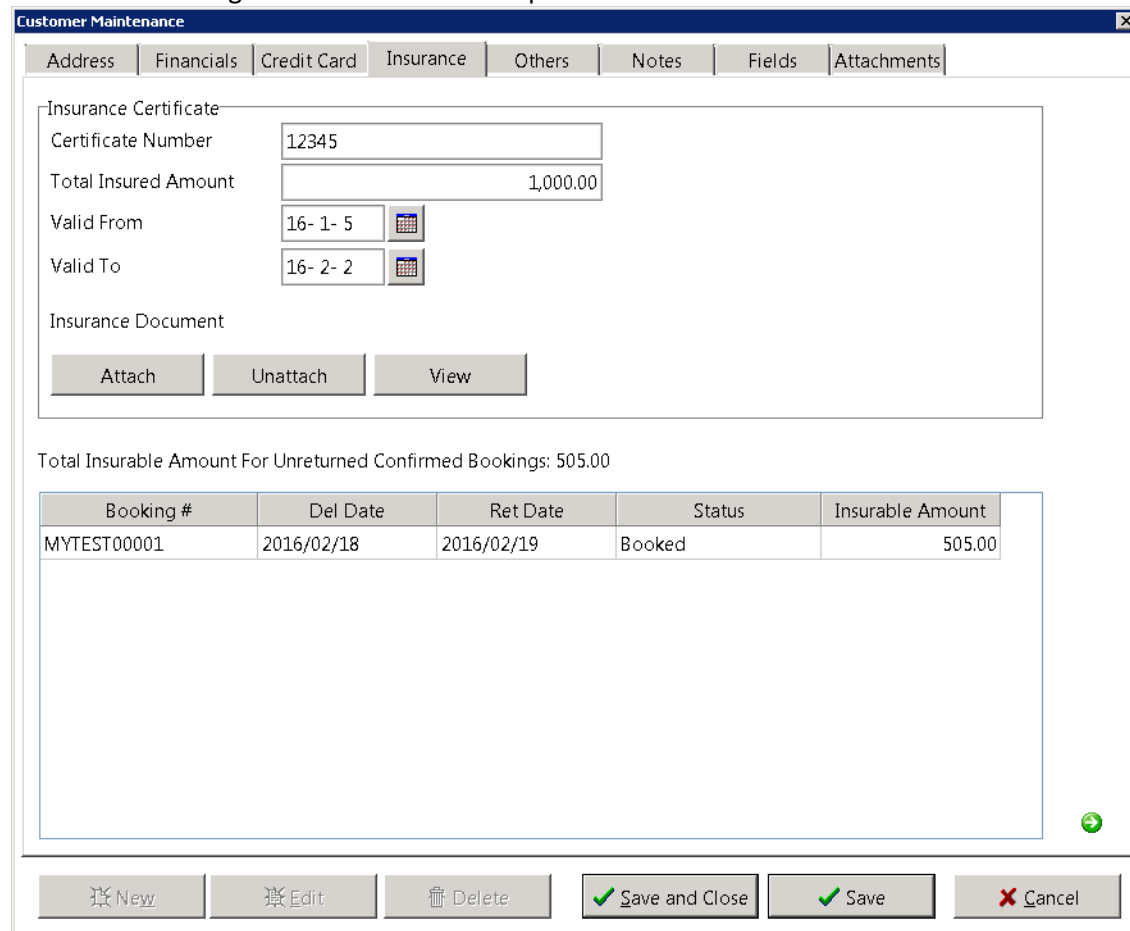
4   Customer Insurance Certificate & Bookings

4.1   Verify Insurance for a booking

In the booking, on the calendar tab, use the 'Verify Insurance' button to confirm the customers insurance is valid. Access the customer record outside of the booking to address issues where necessary.

In this example, the customers insurance certificate either doesn't exist or isn't valid for the time period of the booking. Edit the customer record to address this issue.
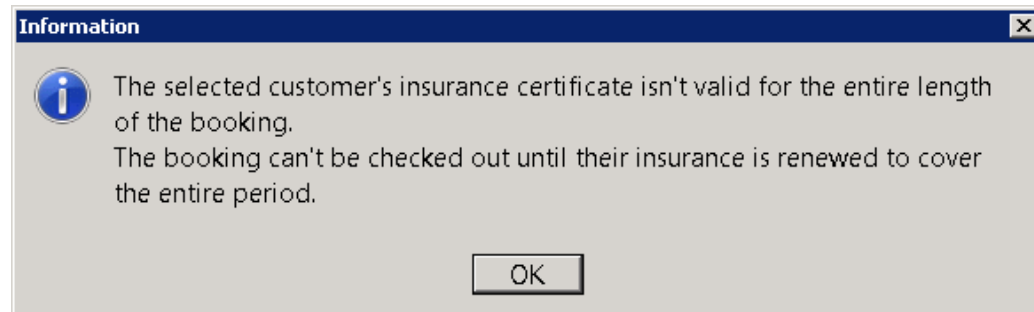
When saving the booking, if insurance isn't valid, you will get the same warning.

4.2 Cycle Billed/Open Return Bookings

For cycle billed bookings, you can specify an expected return date for the booking so it will only look at the insurance for that time.

5 Insurance Coverage Report

Access this report via Right click from the CUSTOMER menu