



Customer Insurance Certificate

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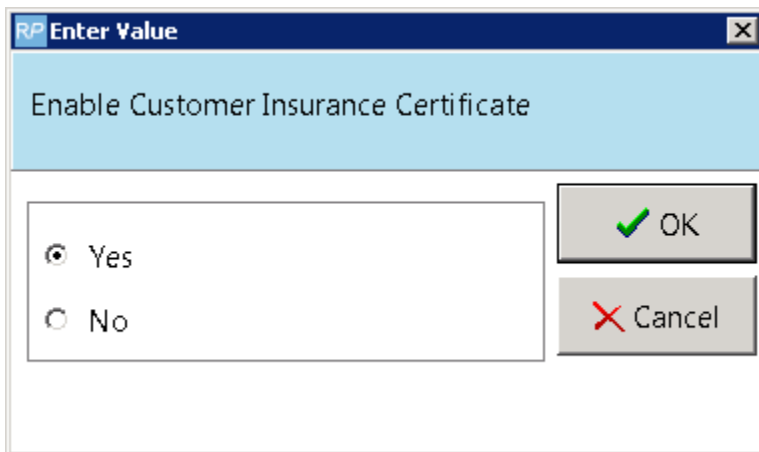
1 Customer Insurance Certificates in Rentalpoint

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

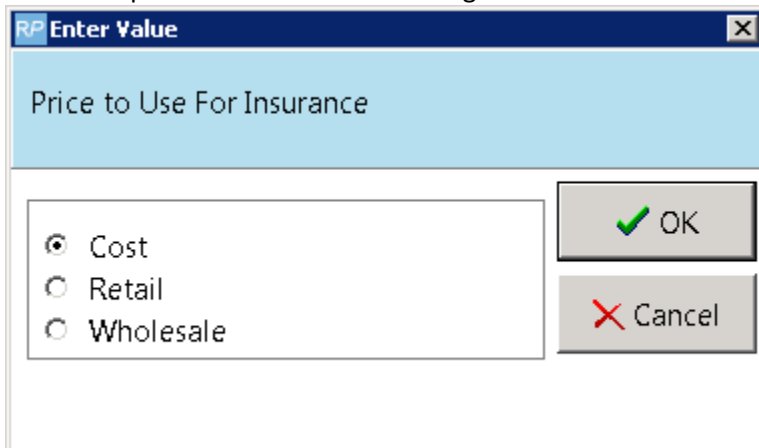
2.1 Turning on Insurance Parameter

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



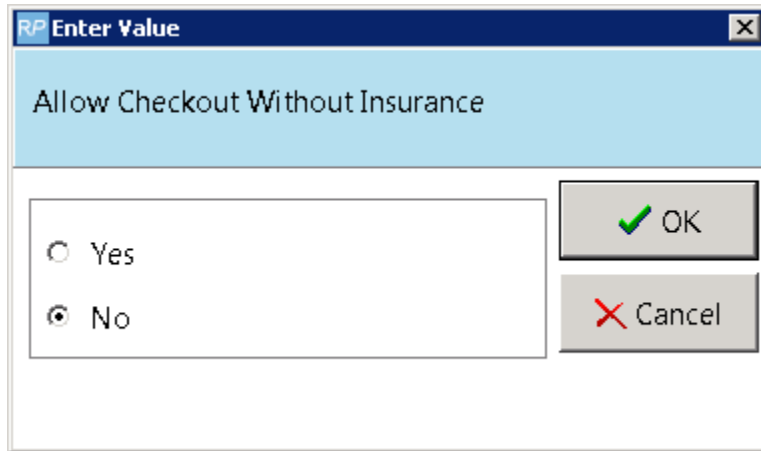
The screenshot shows a dialog box titled "RP Enter Value" with a close button (X) in the top right corner. The main text inside the dialog is "Enable Customer Insurance Certificate". Below this text is a group box containing two radio button options: "Yes" (which is selected) and "No". To the right of the group box are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

2. Select the price to use when calculating insurance certificate coverage



The screenshot shows a dialog box titled "RP Enter Value" with a close button (X) in the top right corner. The main text inside the dialog is "Price to Use For Insurance". Below this text is a group box containing three radio button options: "Cost" (which is selected), "Retail", and "Wholesale". To the right of the group box are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

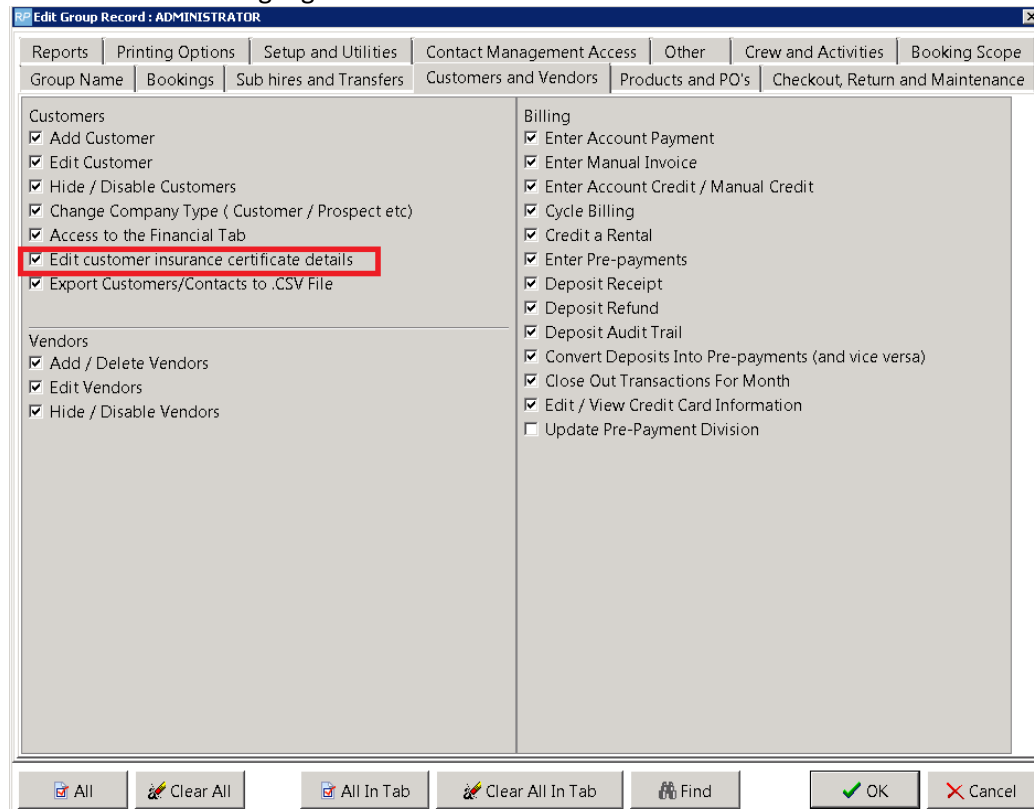
3. Allow checkout of Booking with or without insurance certificate



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

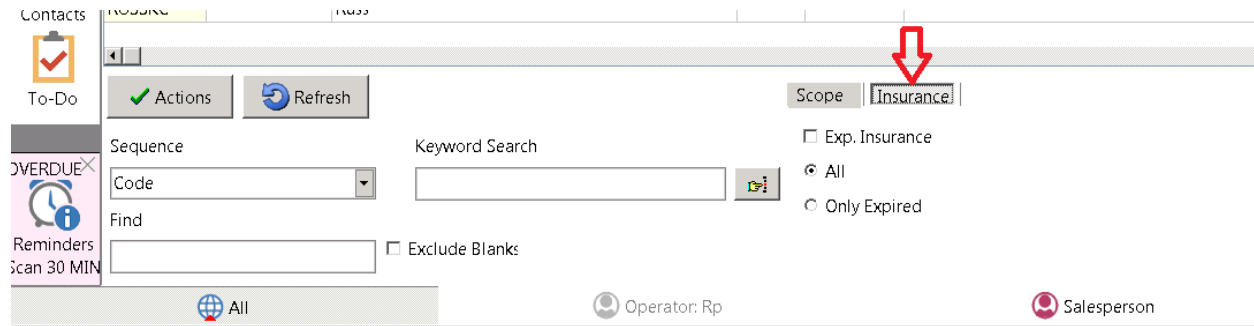
2.2 Setting Operator Privileges

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



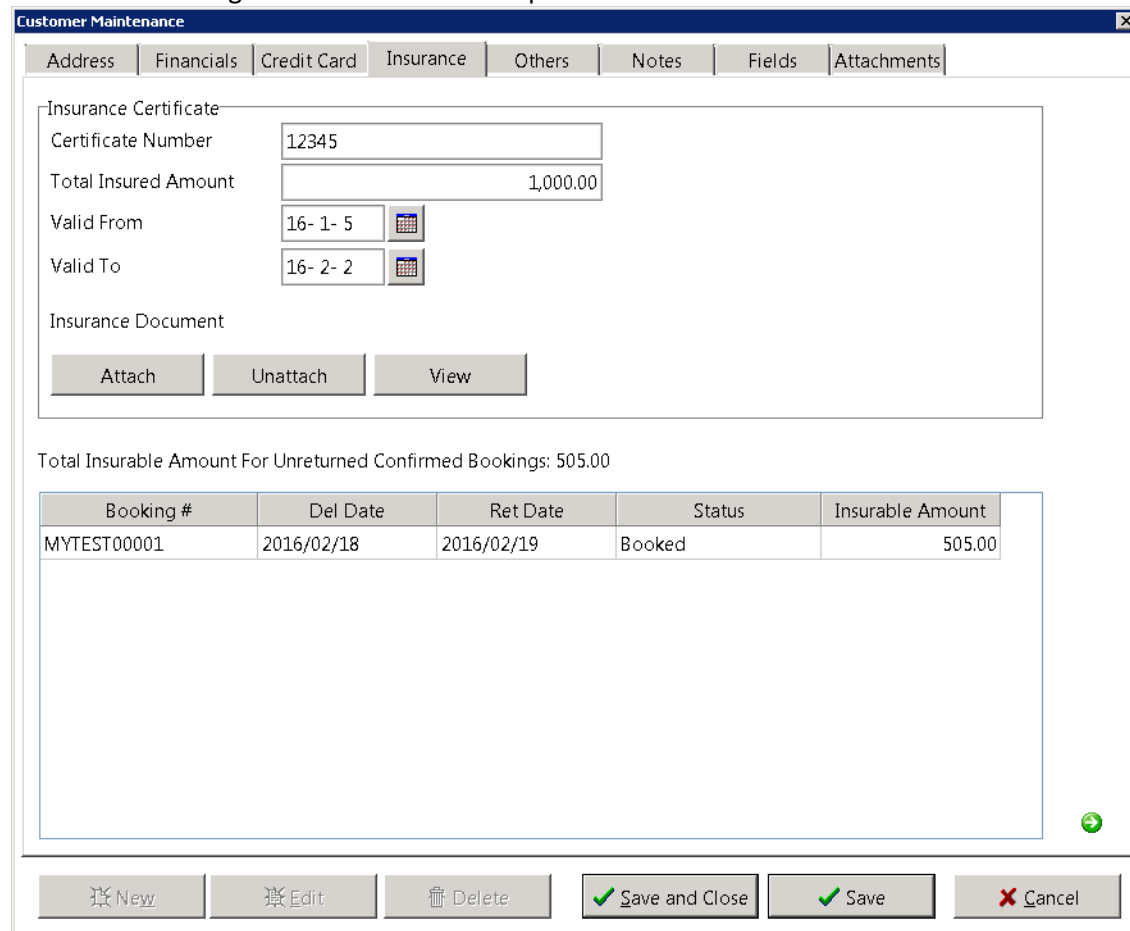
3 Customer Insurance Certificates in the Customer Record

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.

RF Modify booking

Out 15/10/05 0012 In 15/10/05 1700 BRIST00021

Customer	Calendar	Equipment	Crew	Venue	Notes	Payments	Attachments	Show Detail
----------	----------	-----------	------	-------	-------	----------	-------------	-------------

Warehouse Out Date and Time
15-10-5 2015 October 5th

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	4	5	6	7	8	9
	11	12	13	14	15	16
	18	19	20	21	22	23
	25	26	27	28	29	30
						31

Warehouse Out Time 0012

Warehouse In Date and Time
15-10-5 2015 October 5th

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	4	5	6	7	8	9
	11	12	13	14	15	16
	18	19	20	21	22	23
	25	26	27	28	29	30
						31

Warehouse In Time 1700

Schedule Dates and Times Schedule Enabled

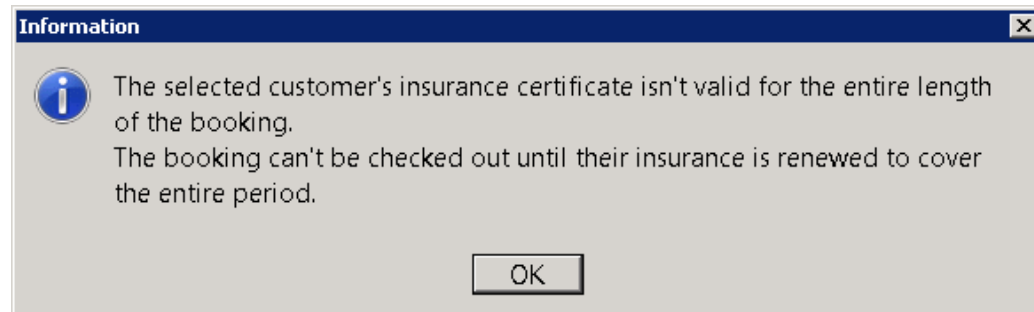
	Date	Time
<input type="checkbox"/> Prep	15-10-5	0012
<input checked="" type="checkbox"/> Load	15-10-5	1100
<input checked="" type="checkbox"/> Delivery	15-10-5	1600
<input type="checkbox"/> Setup by	15-10-5	1700
<input type="checkbox"/> Rehearsal	15-10-5	1700
<input type="checkbox"/> Show starts	15-10-5	1700
<input type="checkbox"/> Show finishes	15-10-5	1700
<input type="checkbox"/> Strike	15-10-5	1700
<input type="checkbox"/> Pickup for return	15-10-5	1700
<input type="checkbox"/> Unload and Check	15-10-5	1700
<input type="checkbox"/> De-prep	15-10-5	1700

Days Using 1

TOTAL DAYS 0.00

Charge Half Day

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.

Out 16/02/17 0900 In: open ended MYTEST00002

Customer	Calendar	Equipment	Crew	Venue	Notes	Payments	Attachments	Show Details																																																																																											
Warehouse Out Date and Time		Warehouse In Date and Time		Long Term Rental Options																																																																																															
16- 2-17 2016 February 17th		79-12-31 2079 December 31st																																																																																																	
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5 Insurance Coverage Report

Access this report via Right click from the CUSTOMER menu

New	Canada	M2W 8H6	www.cor
Find	poration	USA	92707 http://w
Open	e Office & Headquarters	USA	92807 http://w
View		USA	78735 http://w
Admin	nada Inc.	Canada	M9W 6V1 http://w
Financials			
Print	AR Aged Analysis		/w
Refresh	AR Aged Analysis with Salesperson		/hil
Options	AR Audit Trail		/w
	Cash Receipts		/w
	Invoice Register		/w
	Statements		/w
	Total Monthly Sales		/w
	Cancelled Invoice Numbers		/w
	Insurance Coverage		
	Mailing Labels		
	Price Overrides		
	Print Selected Customer [Using a Template]		
	Print Selected Customer [Using a FastReport]		/w