



# RentalPoint Email Functionality

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# RentalPoint Email Functionality

## Configuring 'Sender' Email Address in RentalPoint

Users log into RentalPoint with an Operator Name and password. The Operator's email address is used as the 'sender' email address when emailing from RentalPoint to clients. The source you use for that address depends on how your company wants to utilize emailing within RentalPoint. Here's how each option works:

 You can use a combination of the options above. For example, your warehouse staff may use a general email address such as [warehouse@rentp.com](mailto:warehouse@rentp.com); but your salespeople use their individual email accounts. In this scenario your warehouse staff are configured with **Company Email Settings** and your salespeople are configured with **Custom Email Settings**.

## Custom Email Settings

Each operator has his/her own email address. When sending email, the email is delivered from the individual email account. Clients receive an email from a specific operator i.e. John Doe - [john.doe@gmail.com](mailto:john.doe@gmail.com)

1. Go to Setup – Operators and open the operator record.
2. Select **Use Custom Email Settings** from the drop down list.
3. Enter the appropriate details and click **Send Test Email** to ensure the email settings work.
  - a. Note: If using Microsoft Outlook on your workstation, leave your email settings blank. RentalPoint will pick up the Outlook Settings on the workstation you are logged in from, and use that email address when sending out emails.
4. Save and close the operator record.
5. Restart RentalPoint for the changes to take effect.

The screenshot shows the 'Edit Operator Record' window for 'CHERYL FLOWERS'. The 'Email settings' section is highlighted with a green box. It includes a dropdown menu set to 'Use Custom Email Settings', and input fields for 'Email Address' (cheryl@rentp.com), 'SMTP Address(Host)' (smtp.rentp.com), and 'SMTP Port' (999). There is also a dropdown for 'SSL/TLS' set to 'SSL'. A checkbox 'My smtp server requires authentication' is checked. Below these fields are buttons for 'Send Test Email', 'Clear Stored Password', and 'Auto Emailing Options'. Other sections include 'Operator Settings' (First Name: Cheryl, Last Name: Flowers, Group: ADMINISTRATOR, Login Name: CHERYL FLOWERS, Password: 12345), 'Default Location' (0 - Main), 'Default Division', 'Default Salesperson' (ZA), and 'Default Project Manager' (ZA). At the bottom are 'OK' and 'Cancel' buttons.



## RentalPoint Email Functionality

### Company Email Settings

Operators share the same email address from Setup – Parameters – Web and Email. Clients receive an email from a general account i.e. RentalPoint Support – [support@rentp.com](mailto:support@rentp.com)

1. Go to Setup – Parameters – Web and Email and navigate to the SMTP tab.
2. Enter the appropriate details and click **Send Test Email** to ensure the email settings work.

RP Web and Email Setup

General SMTP

Email Address: support@rentp.com

SMTP Address (Host): smtp.rentp.com

SMTP Port: 999

SSL/TLS: SSL

My smtp server requires authentication

Send Test Email

Clear Stored Password

OK Cancel

3. Go to Setup – Operators and open the operator record.
4. Select **Use Company Email Settings** from the drop down list.
5. Save and close the operator record.
6. Restart RentalPoint for the changes to take effect.

Email settings: Use Company Email Settings

Email Address: support@rentp.com

SMTP Address (Host): smtp.rentp.com

SMTP Port: 999 SSL/TLS: SSL

My smtp server requires authentication

Send Test Email

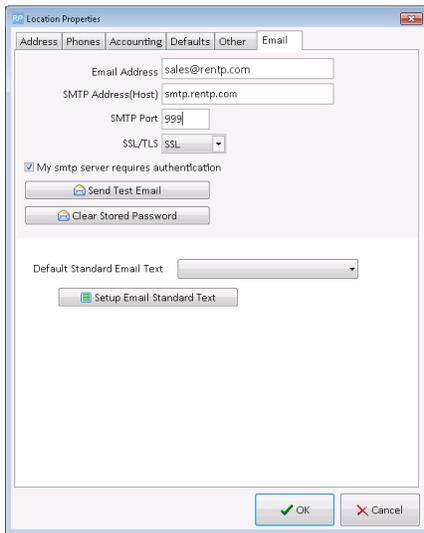
Clear Stored Password

Auto Emailing Options

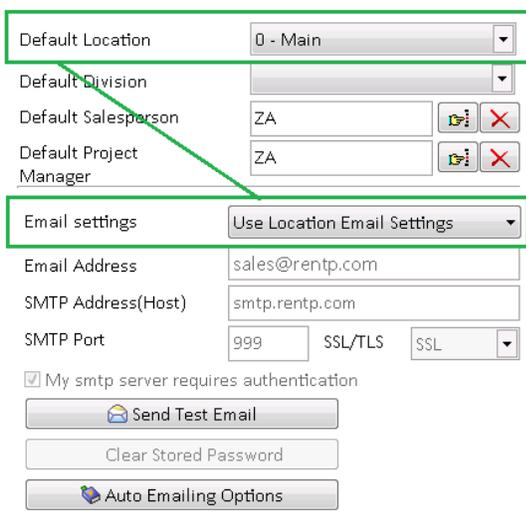
## Location Email Settings

Each operator is configured with a default location. The operator uses the email address from his/her default location. The location email is configured in Setup – Locations. Clients receive an email from a general account i.e. Warehouse – [warehouse@rentp.com](mailto:warehouse@rentp.com) , Sales – [sales@rentp.com](mailto:sales@rentp.com)

1. Go to Setup – Locations, open the location record and navigate to the Email tab.
2. Enter the appropriate details and click **Send Test Email** to ensure the email settings work.



3. Go to Setup – Operators and open the operator record.
4. Select **Use Location Email Settings** from the drop down list.
5. Save and close the operator record.
6. Restart RentalPoint for the changes to take effect.





## RentalPoint Email Functionality

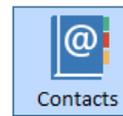
### Auto Email on Product Modification

RentalPoint offers the ability to automatically email a list of contacts based on use of a given product group within any booking.

There is no parameter to control this functionality. Simply put; If the user is on the list, the system will automatically email recipients as per the product 'Auto Email Settings'. If there's no one in the list, no emails will be sent.

### Configuration:

1. Setup all applicable contacts in the Contacts Menu.
2. Edit the group and add the contact to the Auto Email Settings.
  - The check boxes will determine when the contact is emailed.
  - 'Add', will only email a contact when equipment from this group is **first** added to the booking.
  - 'Edit', will email the contact each time changes are made to products in this group, on the booking.
  - 'Del', will email the contact only when **ALL** equipment for that group is deleted from the booking.



First Name	Last Name	Email	Save	Add	Edit	Del
testing	testing		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



## RentalPoint Email Functionality

### Auto Email Operator Group/Individual Operators

RentalPoint offers the ability to automatically email operators when certain actions are executed in the system. For example, you may want to notify the warehouse manager if the dates and times of an upcoming booking have changed. Below is a complete list of actions that can trigger an auto email to an operator.

RP Auto Emailing Options

Select actions that require an automatic email.

- Dates/Times in Calendar Tab of Booking Change
- Price Quoted in Booking Changes
- Venue/Delivery Address in Booking Changes
- Delivery or Return Methods in Booking Change
- Salesperson Changes
- Project Changes
- Project Manager Changes
- New Booking Saved
- Booking Saved in Confirmed Status
- Booking Saved in Heavy Pencil Status
- Booking is Cancelled
- Booking is Deleted
- Equipment Modified Via Resolve Discrepancies
- Equipment Added to Fully Checked Out Booking
- Purchase Order Added
- Purchase Order Edited
- Purchase Order Added/Edited/Unapproved and Needs Approval
- Purchase Order Deleted
- Sub Rental Added
- Sub Rental Edited

RP Auto Emailing Options

Select actions that require an automatic email.

- Sub Rental Added/Edited/Unapproved and Needs Approval
- Sub Rental Deleted
- Transfer Added
- Transfer Edited
- Transfer Deleted
- Confirmed Booking Value Exceeds Customer Credit Limit
- Equipment on Pulled Booking has Changed
- Technician declines a job
- Technician accepts a job
- Technician has updated their profile
- Technician has created a new payroll
- Technician has updated their payroll
- Technician has deleted payroll
- Invoice produced in the system

### Configuration:

- First, enable Operation Parameter 24 (remember to log out and back into RentalPoint once set)
- Next, ensure you have valid email and SMTP settings entered for the operator (see 'configure sender email address' section in this document for further instruction on this step)
- Goto Setup→Operators. There are two ways to set auto email actions;
  - Group Level
    - To apply auto email options to the group, open the group and click Auto Emailing Options. This will allow you to apply settings to all operators in this group. It is much faster and easier than setting individual operator options. The Outlook security warning will be displayed if the user is having problems sending email.
    - In order to cut down on notifications that are not relevant to the user, auto-emailing can be restricted to only include the bookings where an operator is the salesperson or project manager on the booking. These restrictions can be set on the Group or Operator Level.

RP Edit Group Record : ADMINISTRATOR

Reports | Printing Options | Setup and Utilities | Contact Management Access | Other

Group Name | Bookings | Sub rentals and Transfers | Customers and Vendors | Products and P

Group Name: ADMINISTRATOR

Description: ADMINISTRATOR

Auto Emailing Options

Auto-emailing options apply for

- All Bookings
- Where booking salesperson matches operator default
- Project Manager



- Operator Level
  - To apply auto email options to an individual operator, open the operator record and click the 'Auto Emailing' tab. The changes you make will only apply to the operator you are editing.

RP Edit Operator Record : RP

Operator Settings | Multi Location Operator Groups | Workflows | **Auto Emailing**

GROUP : ADMINISTRATOR

First Name: Rental

Last Name: Point

Group (default): ADMINISTRATOR

Login Name: RP

Password: ●●●●●●●●●● Show

Default Region: 0 - ONE

Default Location: 0 - Toronto

Default Division: 2 - Production

Default Salesperson: RP

Default Project Manager: TEST



Operator Settings | Multi Location Operator Groups | Workflows | Auto Emailing

**Auto Emailing Options**

Override group settings with these values

Auto-emailing options apply for

- All Bookings
  - Where booking Salesperson matches operator default
  - Where booking Project Manager matches operator default

**RP Auto Emailing Options**

Select actions that require an automatic email.

- Dates/Times in Calendar Tab of Booking Change
- Price Quoted in Booking Changes
- Venue/Delivery Address in Booking Changes
- Delivery or Return Methods in Booking Change
- Salesperson Changes
- Project Changes
- Project Manager Changes
- New Booking Saved
- Booking Saved in Confirmed Status
- Booking Saved in Heavy Pencil Status
- Booking is Cancelled
- Booking is Deleted
- Equipment Modified Via Resolve Discrepancies
- Equipment Added to Fully Checked Out Booking
- Purchase Order Added

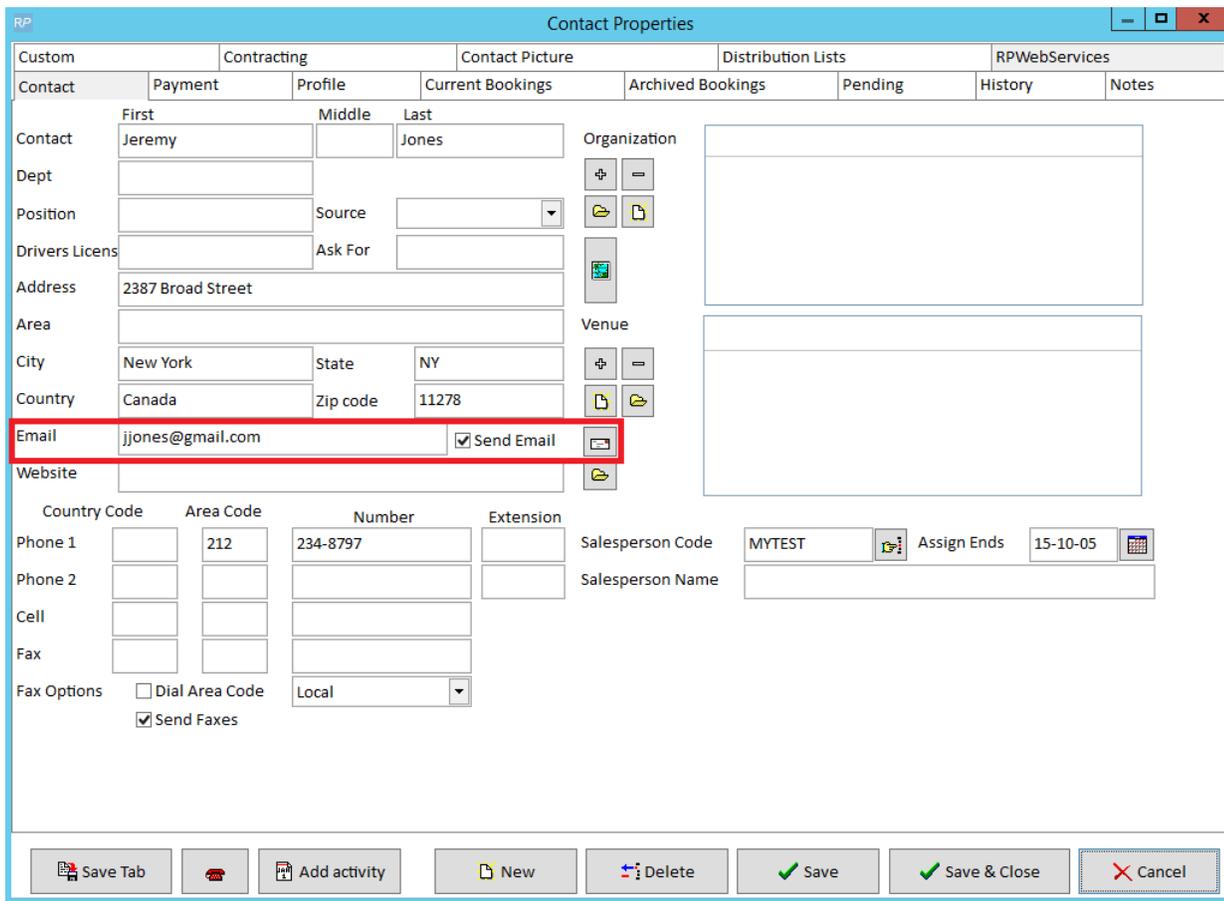
OK Cancel

## Auto Email Technicians

If using Crew Planner, you may want to consider the Auto Email Technicians feature to automatically email technicians on job assignments and changes.

### Configuration:

- Set Crew Structure Parameter 19 – ‘Auto Email Technicians’ to ON
- Ensure the technician has a valid email *and* the Send Emails box is ticked within their contact record.
- Each time any of their job assignments change, they will be automatically emailed with the new details.



The screenshot shows the 'Contact Properties' window in RentalPoint. The 'Email' field is highlighted with a red box, containing the text 'jjones@gmail.com' and a checked 'Send Email' checkbox. Other fields include Name (Jeremy Jones), Address (2387 Broad Street), City (New York), State (NY), Zip code (11278), and Phone numbers. The window also has tabs for Custom, Contracting, Contact Picture, Distribution Lists, and RPWebServices.



Consider also RP WebServices Functionality:

1. Configuring RPWebServices - <http://www.rentp.com/KnowledgebasePDFs/How%20to%20Configure%20RPWS.pdf>
2. Using RPWebServices - <http://www.rentp.com/KnowledgebasePDFs/How%20to%20Use%20RPWS.pdf>
3. Webservices Video Demo - <https://www.youtube.com/watch?v=SPeiJcXoMU>



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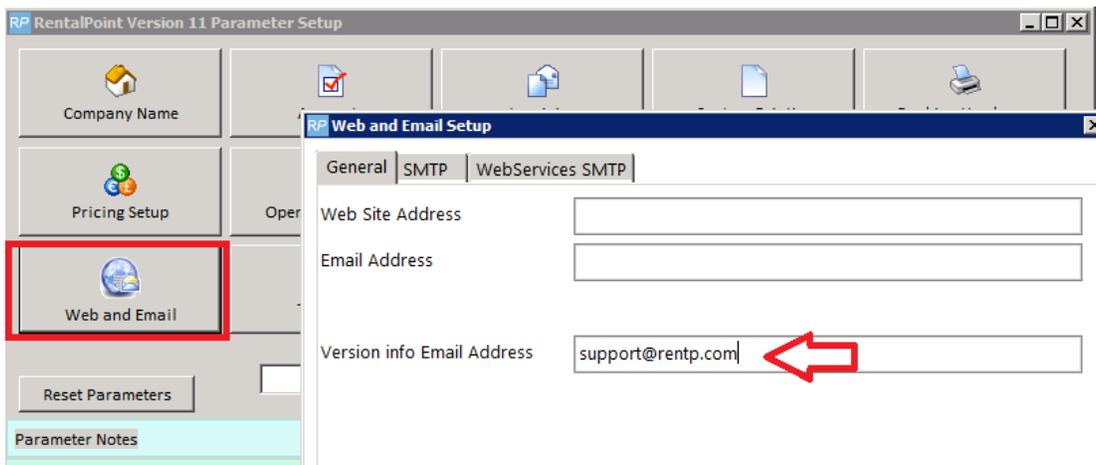
### Auto Email RentalPoint Job Files

With Operational Parameter 185 set, RentalPoint will save a text file of the booking every time the booking is saved. This text file is called a job file and is stored to the DOCS/jobs folder.

RentalPoint now offers the functionality to automatically email job files as they are created. These job files can be used to import booking information to some third party software, depending on the flexibility of that software.

### Configuration

1. Goto Setup→parameters→Web and Email
2. Set the Version Info Email Address to the email account you want all job files to go to (remember to have all users log out and back in to RentalPoint for changes to take effect for all users)



3. Every time a booking is saved, an email will be sent with a *from address* as set up in each users operator record and a *To Address* as set up in the 'Version info Email Address'.
4. Subject of the email will be 'Job (version) file for booking : <Booking Number>'



# RentalPoint Email Functionality

## Building an Email Distribution List



RentalPoint offers the ability to build a distribution list using information you have stored in each customer record.

You will need access to the Contacts Menu to avail of this option

Let's use Industry type as an example.

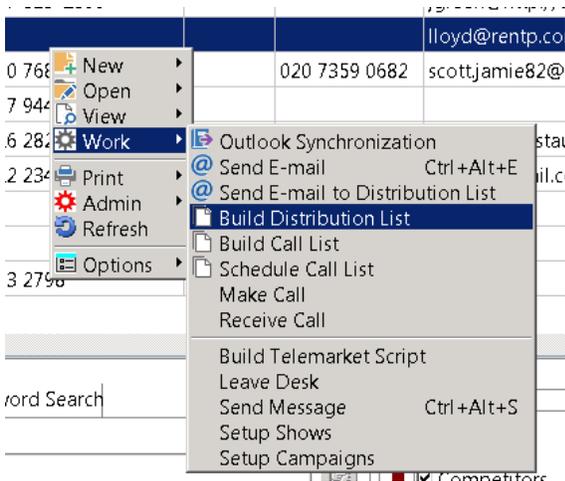
1. In each customer record, add a value for Industry Type. You don't need to set this up anywhere. Just type a value in the field and RentalPoint will build a drop down list for you.

The screenshot shows the 'Customer Maintenance' window with several tabs: Address, Financials, Credit Card, Insurance, Others, Notes, Fields, and Attachments. A red box highlights the top section containing the following fields:

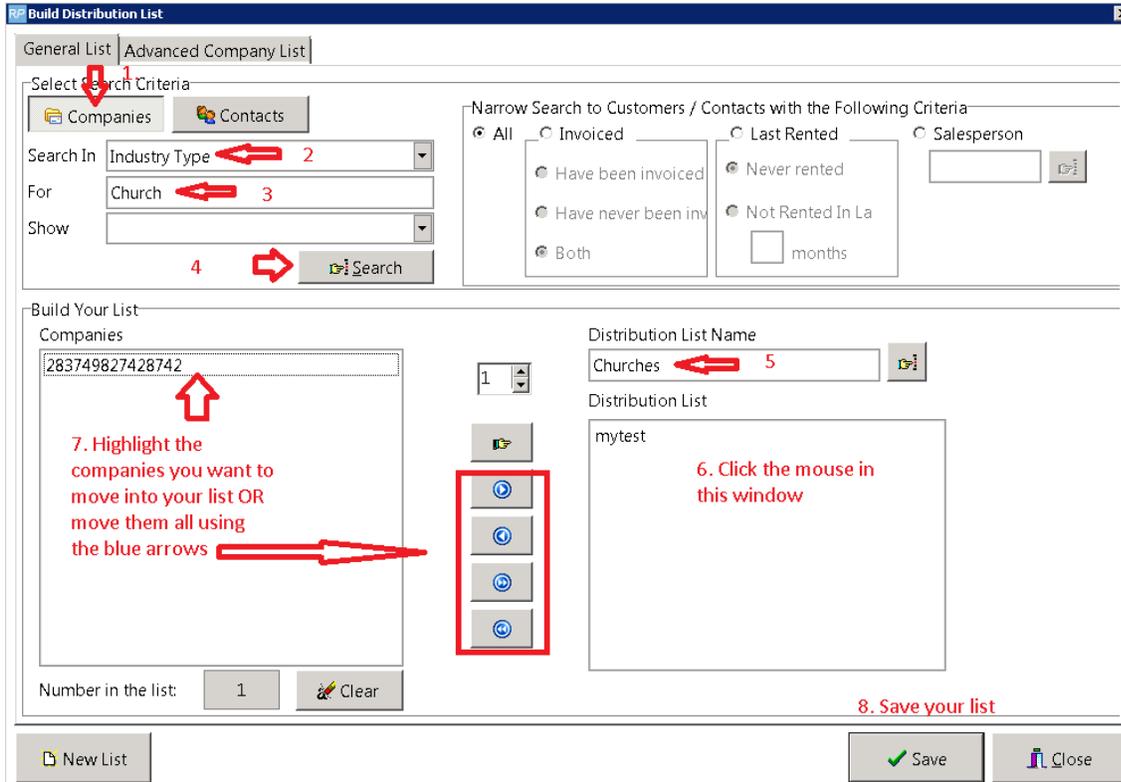
- Industry Type: Church (dropdown)
- Industry Description: Client belongs to a church group (dropdown)
- Campaign / Source: (dropdown)
- Division: (dropdown)
- Purchase Order Number Required:
- Customer Has Custom Template List:

Below the red box, other fields include Customer Number, Last Booking No. (00001), Last Transaction Date (16-2-19), Monthly Cycle Billing Basis (Variable), Salesperson Code, Date Salesperson Assignment Ends (80-1-7), Date Record Created (16-2-14), Created By (RP), and Date First Invoiced (80-1-7). At the bottom are buttons for New, Edit, Delete, Save and Close, Save, and Cancel.

2. Click on CONTACTS menu
3. Then right click →work→Build Distribution list



4. Follow steps one thru seven below



## Sending an Email to your Distribution List

Right Click on the Contacts Grid to activate the menu, then click 'Send E-mail to Distribution List'

