# **RentalPoint SalesPersons**

Last Modified on 03/06/2022 11:17 am EDT

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## Using SalesPerson Functionality

Salespeople are separate from operators in the RentalPoint system.

SalesPersons can be assigned when entering bookings

RP								Modify book	king	
Out 17/08/15 0900 In 17/08/15 1300 MYTEST00038 Location 0 - Toronto 💌						-				
Customer	Calendar	Venue	Equipment	Crew	Notes	Payments	Attachments	Other Details	Status	Follow up
Project Details Project Code		c)	Find 🔷 Open	Salesp	erson erson Code	MYTEST	C <del>⊳</del> ! <u>F</u> in	id		I
Project Descript	tion			Salespe	erson Name					
Project Manage	r Code	Cri	Eind							

#### and used to limit access to booking scope via setup-->operators

RP	P Edit Group Record : ADMINISTRATOR									
Group Na	oup Name Bookings Cross rentals and Transfers Customers and Vendors Products and PO's Checkout, Return and Maintenance									
Reports	eports Printing Options Setup and Utilities Contact Management Access Other Crew and Activities Booking Scope									
Booking Sc → Allow ac operato → Select Sc → Can Cha → Select Lo → Can Cha	cope Options ccess to all Sales r's default Sales alesperson Scop nge Salesperson ocation Scope nge Location	pers perso e	on bookings (do not re on)	strict to						

Limit scope on Booking Grid

	тусас		THE 2017 00 13 05.00 TO	2017 00 13 1.	5.00 Nemui		commed			155	LACT	le la
Contacts	THOMAS00012 James Thor	mas Engineering	Sat 2017-08-26 07:00 Sa	it 2017-08-26 10	6:51 Cross rental - Assigned	To : FISK00004	Confirmed	hgd	RP		49	В
	Sequence	Scone			All dator							
To-Do	Sequence	geope Id Oustra	Tel Basked III Invational		All dates	T-1-1 11.092.4	60.00					
	Out Date and Time	✓ Light Pencil ✓ Sales	Pull Uninvoiced		Month Year	Iotal 10,083,4	90.72					
	Eind	Heavy Pencil     Cross rei     Confirmed     Cycle bil	ntal 🗹 Out 🗹 Complete		Mar 2017	Selected 10,4	09465					
		Cancelled Transfer	Data to Vie	w	Days Dates Months	, <b>.</b>						
	•		Current	O Archive								
Reminders					Au Venesu	ption	s					
Scan 30 MIN	List Plot Sheet	Projects										
			Operator: Rp		C	Salesperson						

## Revenue Report by SalesPerson

By running the Revenue Report you can see how much revenue is being generated by each salesperson.

₽			
Actions	Reports Crystal Reports Assets Setup Others Help		
	Product Reports		
	Booking Reports		
Booking	Crew Reports 🕨 ew Work		
	Financials Tax Report		In
	Reminders For Overdue Items Revenue Report		
Shortage	Top Cross rental Products Profit Analysis 3:	47	Th
Shortage.	Cross rental Statistics Report Sales Analysis 0:	00	Mc
	Open Return Audit Trail Losses and Breakages Report 2:	01	Tue
لحصحا	Deleted PO Numbers Price Overrides 7:	00	
Customer	MyTEST00028 mytest Master Billing Report 7:	00	
	CHESABAR00030 Chesapeake Bar Association me	00	Sat

Or ....

## SalesPerson Commission Report

\*\* Available when using RentalPoint Single Currency License with Operational

Parameter #77 Enabled

## Editing or Creating a SalesPerson

- 1. Accessed via Setup-->Salesperson option in the setup menu.
- 2. To create a new salesperson click Add New, this will enable the grid and allow information to be typed in.
- 3. Enter a salesperson code and name. Entering an email address will display the contact properties window. This will allow you to create a contact record for your salesperson and store more information.
- 4. Once all desired information has been entered, click Close to save the list.

Lode	Name	Email	Customer Assignment (Months)	Contact Assignment (Months)	
B	Adel Burbank	aburbank@costy.com	6	96	
н	Phil Hessleton		2	96	
т	Steve Banks		8	96	
F	Trevor Forger	trevor.forger@bank.ca	9	96	
0	Tina Oberlang		9	96	
vw	William DeFaux		12	96	

To associate a salesperson to an operator in the system please take a look into the operators properties in operator setup. Once a salesperson is entered they can be disabled but not deleted for tracking and reporting integrity.

### Using Default SalesPerson to Initial Operator Functionality

Check Operational Parameter 77 and set to 'Default Booking Salesperson to Initial Operator'. You can check this via setup-->parameters-->operational-->77 then click through the options.

RP Enter Value	×
Default Booking Salesperson	
<ul> <li>Initial Operator</li> <li>Operator Default</li> </ul>	✓ OK × Cancel

With this setting, when entering a new booking, Rentalpoint will create a new salesperson code with a description equal to the current operator login.

**Operator Record:** 

RP		Edit Operator Recor	d : RP
Operator Settings	Multi Location Operator Groups		
GROUP : ADMINISTR	ATOR		
First Name	Rental		
Last Name	Point	C	Default
Group (default)	ADMINISTRATOR	- C	Default
Login Name	RP -		Dofault
Password	RP	<u>N</u>	/anaq

#### The SalesPerson Record Created:

	Salespersons						
Code	Name	Email	istomer Assignment (Month	Assignment (			
RP	My Rentalpoint		0	0			
MYTEST	myemail 0			0			
RP1	RP Crea	Created to match the					
MY	Operator login name 0			0			
EDM	EDM		0	0			
СН	CHECKOUT		0	0			
YYY			0	0			
▲dd New     ➡ Open     ☑ Link     Change Code     ☑ Enable     ☑ Disable     ☑ Commission							

### The booking:

	Inquiry									
Out 07/25/18 1000 In 07/26/18 1800 Location 0 - Toronto -										
Customer	Calendar	Equipment	Crew	Venue	e	Notes	Payments	Attachments	Other Details	Status
Project Detail Project Code	s	1	ind 🗇 Open		-Salespe Salespe	erson erson Code	RP1	r <b>⊳</b> in	d	
Project Description			Salesperson Name RP							
Project Manag	er Code	- 1 C	Ind							

- In the example above RP1 was created when operator RP entered a booking for the first time with Operational Parameter 77 set as above.
- If you disable that salesperson, the next time a booking is created, another salesperson record will be added (See screenshot below)

	Salespersons					
Code	Name	Email	istomer Assignment (Month	Assignment (		
RP	My Rentalpoint		0	0		
MYTEST	EST myemail 0		0			
RP1	RP		0	0		
MY			0	0		
EDM	EDM		0	0		
СН	CHECKOUT		0	0		
YYY			0	0		
RP2	RP RP		0	0		
Add New	⊖ <u>O</u> pen	Code 📝 Enable	Oisable S Commissio	n <u>I C</u> lose		

In order to use your current salesperson codes with Operational Parameter 77 please do the

#### following

Via setup salespersons option: (See screenshot 2 below)

- disable any codes you are not using
- click on the description of any salesperson codes you are using and make them identical to your operator login names
- Then log out of RentalPoint and back in again.

RP Salespersons X							
Code	Name	stomer Assignment (Month	Assignment (				
RP	RP Contract RP RP	ogin name	0	0			
MYTEST		myemail	0	0			
RP1	RP <		0	0			
MY			0	0			
EDM	EDM		0	0			
СН	CHECKOUT		0	0			
YYY			0	0			
Add New	▶ <u>O</u> pen 🕞 Link Change Cod	e 🖻 Enable 🔇	Disable S Commissio	n <u>Î</u> <u>C</u> lose			

- Test out entering a new booking and see how it picks up the sales person code with a description that matches your operator login.
- edit an old booking and see how the salesperson code brings up the new description.

	•	

RP	Inquiry						_ <b>D</b> X		
Out 07/25/18 1000 In 07/26/18 1800			Location 0 - Toronto				✓ Save		🗙 Cancel
Calendar	Equipment	Crew	Venue Notes Payments		Attachments	Other Details	Status < >		
Project Details Project Code Project Description Project Manager Code Pr					-Salespe Salesper Salesper	rson son Code son Name	RP RP		ind

### SalesPerson Parameters

- 1. Operational Parameter 77 'SalesPerson Field Access'
  - 1. Allows/Denies access to SalesPerson Field in the booking
  - 2. Designates the source of the SalesPerson code for each booking (i.e. from customer or booking)
  - 3. Defaults SalesPerson to either
    - 1. Initial Operator entering the booking OR ..
    - 2. The Operator Default as set in the Operator Record OR..
    - 3. The SalesPerson Code as set in the corresponding Customer Record
- 2. Operational Parameter 201 'Assign SalesPerson from Project'
  - 1. Allows the project salesperson to be assigned to any bookings placed in the project