

RentalPoint SalesPersons

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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 booking

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 [] Find Open
Project Description []
Project Manager Code [] Find

Salesperson
Salesperson Code MYTEST Find
Salesperson Name []

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

RP Edit Group Record : ADMINISTRATOR

Group Name Bookings Cross rentals and Transfers Customers and Vendors Products and PO's Checkout, Return and Maintenance
Reports Printing Options Setup and Utilities Contact Management Access Other Crew and Activities Booking Scope

Booking Scope Options

Allow access to all Salesperson bookings (do not restrict to operator's default Salesperson)

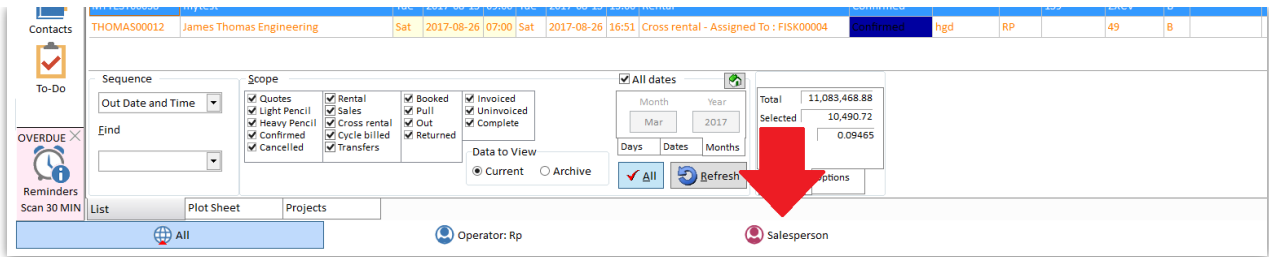
Select Salesperson Scope

Can Change Salesperson

Select Location Scope

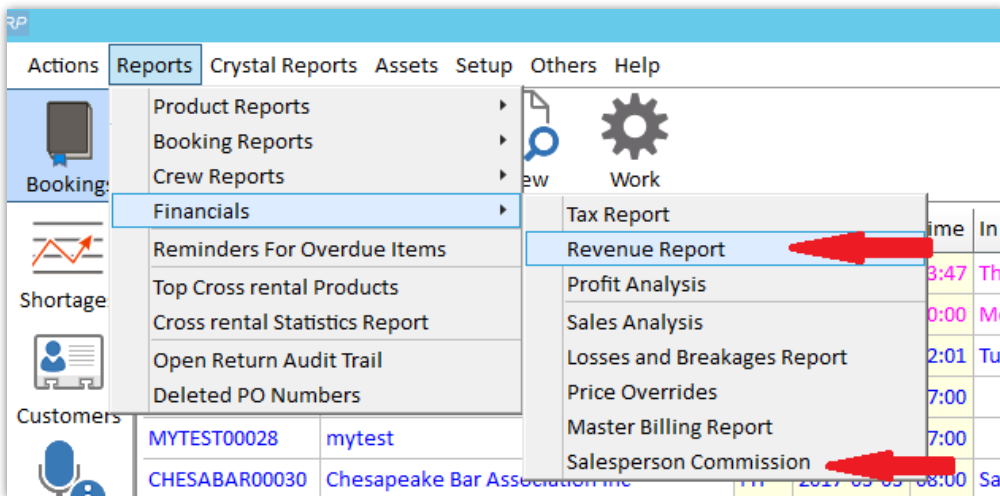
Can Change Location

Limit scope on Booking Grid




Revenue Report by SalesPerson

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

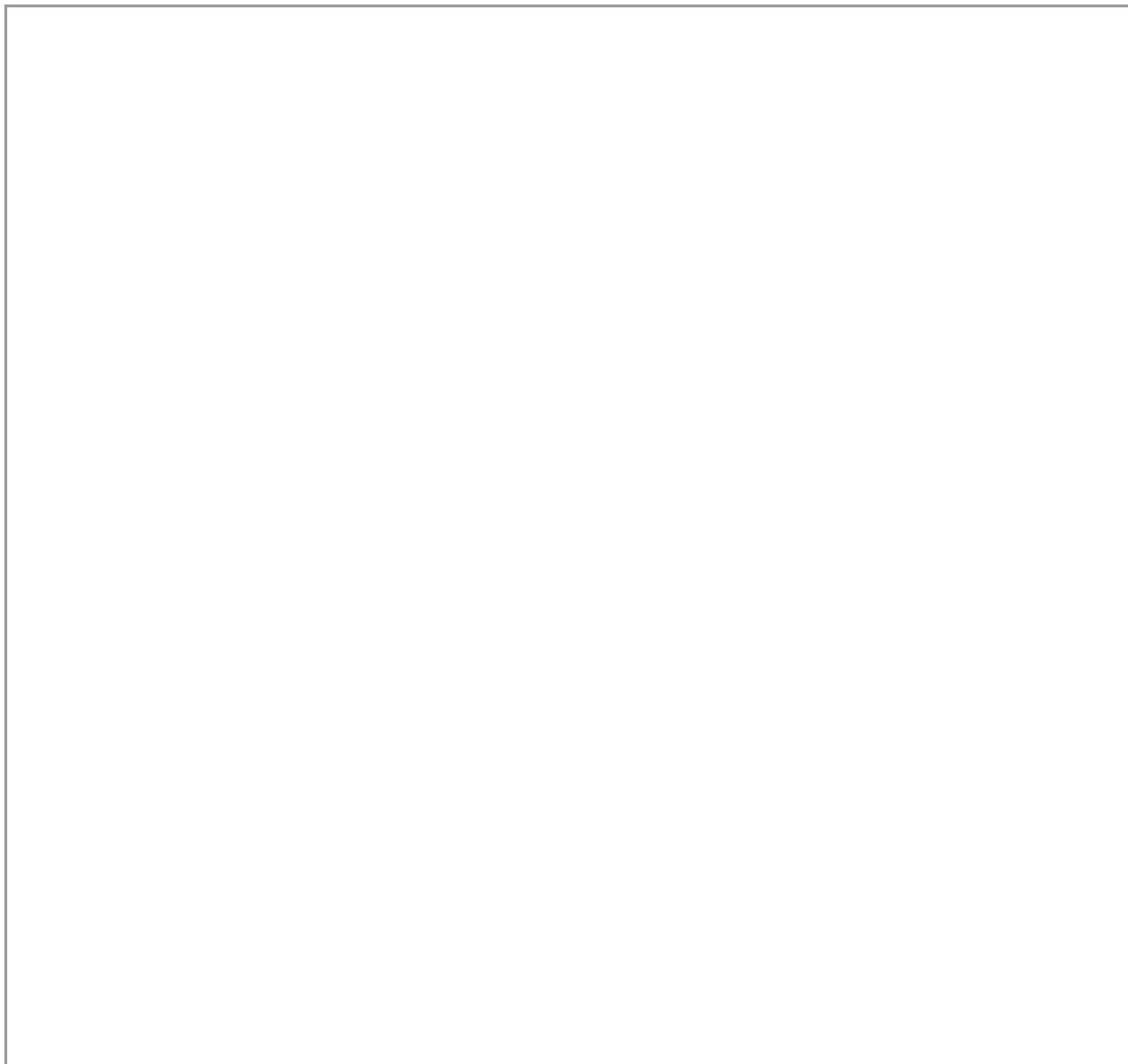


Or

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.
-

Code	Name	Email	Customer Assignment (Months)	Contact Assignment (Months)
AB	Adel Burbank	aburbank@costy.com	6	96
PH	Phil Hessleton		2	96
ST	Steve Banks		8	96
TF	Trevor Forger	trevor.forger@bank.ca	9	96
TO	Tina Oberiang		9	96
WW	William DeFaux		12	96

Buttons: Add New, Open, Link, Enable, Disable, Close

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

Initial Operator
 Operator Default

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 Record : RP

Operator Settings Multi Location Operator Groups

GROUP : ADMINISTRATOR

First Name Rental

Last Name Point

Group (default) ADMINISTRATOR

Login Name RP

Password RP

Default
Default
Default
Default
Manag

The SalesPerson Record Created:

RP Salespersons

Code	Name	Email	Customer Assignment (Month)	Assignment (
RP	My Rentalpoint		0	0
MYTEST		myemail	0	0
RP1	RP		0	0
MY			0	0
EDM	EDM		0	0
CH	CHECKOUT		0	0
YYY			0	0

Created to match the Operator login name

Add New Open Link Change Code Enable Disable Commission Close

The booking:

RP Inquiry

Out 07/25/18 1000 In 07/26/18 1800 Location 0 - Toronto

Customer Calendar Equipment Crew Venue Notes Payments Attachments Other Details Status

Project Details
Project Code Find Open
Project Description
Project Manager Code Find

Salesperson
Salesperson Code RP1 Find
Salesperson Name RP

- 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)

RP Salespersons

Code	Name	Email	Customer Assignment (Month)	Assignment (
RP	My Rentalpoint		0	0
MYTEST		myemail	0	0
RP1	RP		0	0
MY			0	0
EDM	EDM		0	0
CH	CHECKOUT		0	0
YYY			0	0
RP2	RP		0	0

Add New Open Link Change Code Enable Disable Commission Close

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.
-

Code	Name	Email	Customer Assignment (Month)	Assignment (Month)
RP	RP Modified to match operator login name		0	0
MYTEST		myemail	0	0
RP1	RP Disabled		0	0
MY			0	0
EDM	EDM		0	0
CH	CHECKOUT		0	0
YYY			0	0

- 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.
-

Out 07/25/18 1000 In 07/26/18 1800 Location 0 - Toronto

Calendar Equipment Crew Venue Notes Payments Attachments Other Details Status

Project Details
Project Code
Project Description
Project Manager Code

Salesperson
Salesperson Code RP
Salesperson Name RP

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