

Managed Account Warning

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When the default salesperson assigned to the *booking customer* differs from the salesperson assigned to the *current operator*, a warning will be displayed. The warning will advise the user to consult with the assigned salesperson before creating or modifying the managed customers' booking.

If the user chooses to proceed and save the booking despite the warning, the warning in the booking audit trail for tracking and accountability.

** The Managed Account Warning feature is available in RentalPoint version 12.0.13.0 and later **

How it Works:

When the user attempts to create or modify a booking for a managed account, the user will be warned to check with the assigned salesperson before proceeding.

The screenshot displays the RentalPoint software interface. At the top, there's a header bar with 'RP' logo, date/time 'Out 26/10/29 0800 In 26/10/30 1700', and user 'MOORT00003'. Below this is a navigation bar with tabs: Customer, Calendar, Equipment, Crew, Venue, Notes, Payments, Attachments, Other Details, Status, and Follow up. The main form area is divided into sections: 'Invoice To' (with fields for New Customer, Customer Code, Organisation, Web, Street Address, Postal address, Street, Area, City, Country, Post Code), 'Bill To' (with fields for Same, TOWE001, Find, Search), and 'Booking Type' (with fields for Hire, Currency, Canadian Dollars, Rental Price Set Customer Pays). A red arrow points to a warning dialog box titled 'Information' that appears over the form. The dialog box contains the text: 'Warning - This account is managed. Please contact (MB - Miles Brillo) before entering a booking for this customer.' and an 'OK' button.

Configuration:

To avail of this functionality Operational Parameter #77 Salesperson field access

- Must be enabled

RP Enter Value

Salesperson Field Access

☒ Enabled
☐ Disabled

- Set to customer

RP Enter Value

Salesperson Assigned To

☐ Booking
☒ Customer

- Managed Account Warning must be enabled

RP Enter Value

Managed Account Warning

☒ Enabled
☐ Disabled

Defining a Managed Account

A managed account is defined as an account having the default salesperson code assigned under

the **others** tab of the customer account.

When the customer has no default salesperson assigned then the managed account warning is not displayed

The screenshot shows the 'Customer Maintenance' window with the 'Others' tab selected. The window has a title bar with a close button. Below the title bar are buttons for 'New', 'Edit', 'Delete', 'Save and Close', 'Save', and 'Cancel'. The 'Others' tab is active, showing fields for 'Industry Type', 'Industry Description', and 'Campaign / Source'. Below these are checkboxes for 'Purchase Order Number Required' and 'Customer Has Custom Template List'. A horizontal line separates the top section from the bottom section. The bottom section contains fields for 'Customer Number', 'Last Booking No.' (00020), 'Last Transaction Date' (26-09-16), 'Monthly Cycle Billing Basis' (Variable), 'Salesperson Code' (MB), 'Date Salesperson Assignment Ends', 'Date Record Created' (23-02-14), 'Created By' (RENTALPOINTSUPPORT), 'Date First Invoiced' (23-10-19), and 'Customer Freight Zone' (0). A red arrow points to the 'Salesperson Code' field. Below these fields are radio buttons for 'Customer Type For Exporting': 'Internal' (selected), 'Group', and 'External'. A green arrow points to the bottom right corner of the window.

The salesperson code assigned to the operator's record should match the salesperson code assigned to the customer account when the account is managed by that operator.

The screenshot shows the 'Edit Operator Record : RENTALPOINTSUPPORT' window. The window has a title bar with a close button. Below the title bar are tabs for 'Operator Settings', 'Multi Location Operator Groups', 'Workflows', and 'Auto Emailing'. The 'Operator Settings' tab is active, showing fields for 'First Name' (RentalPoint), 'Last Name' (Support), 'Group (default)' (ADMINISTRATOR), 'Login Name' (RENTALPOINTSUPPORT), and 'Password' (masked). To the right of these fields are fields for 'Default Region' (0 - EAST), 'Default Location' (0 - Toronto), 'Default Salesperson' (MB), and 'Default Project Manager'. A red arrow points to the 'Default Salesperson' field. Below these fields is a dropdown for 'Email settings' (Use Custom Email Settings).