Managed Account Warning

Last Modified on 29/10/2026 3:38 pm EDT

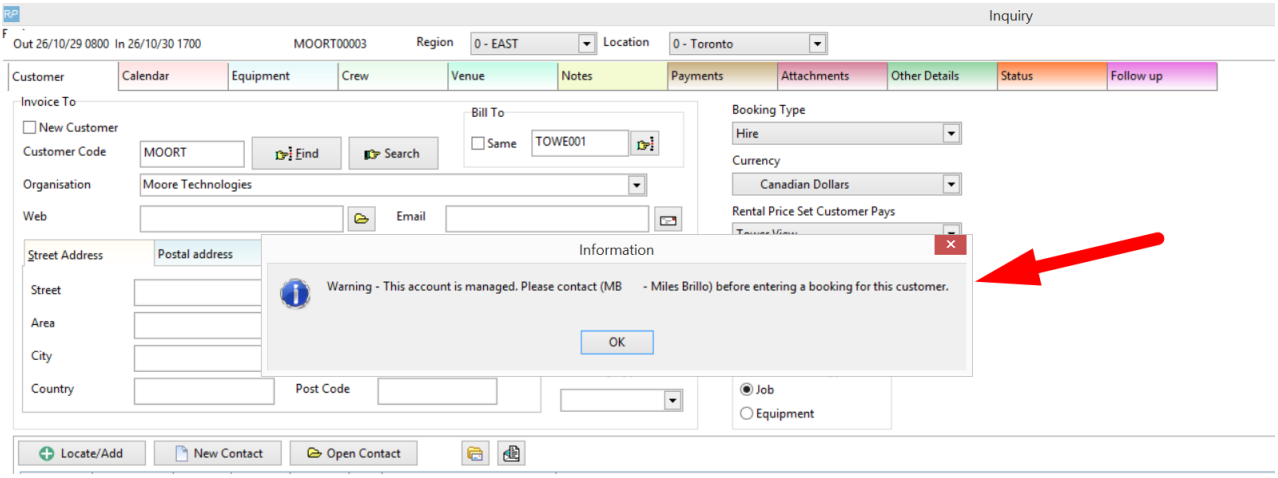
When the default salesperson assigned to the *booking customer* differs from the salesperson assigned to the *current operator*, a warning will be displayed. The warning will advise the user to consult with the assigned salesperson before creating or modifying the managed customers' booking.

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:

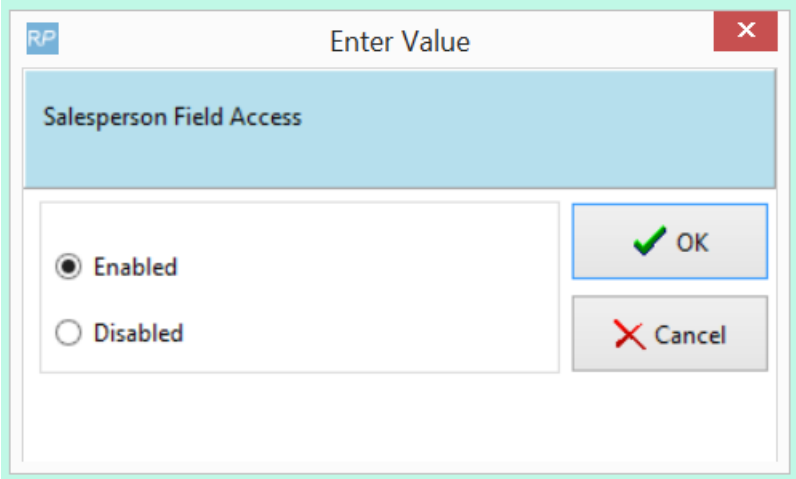
When the user attempts to create or modify a booking for a managed account, the user will be warned to check with the assigned salesperson before proceeding.



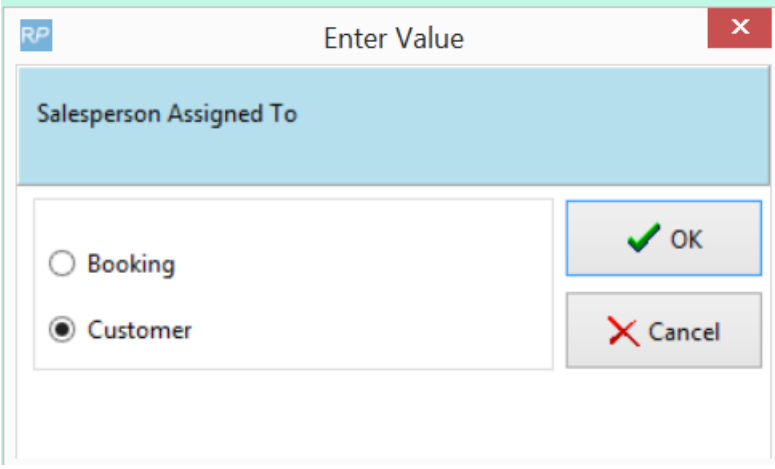
Configuration:

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

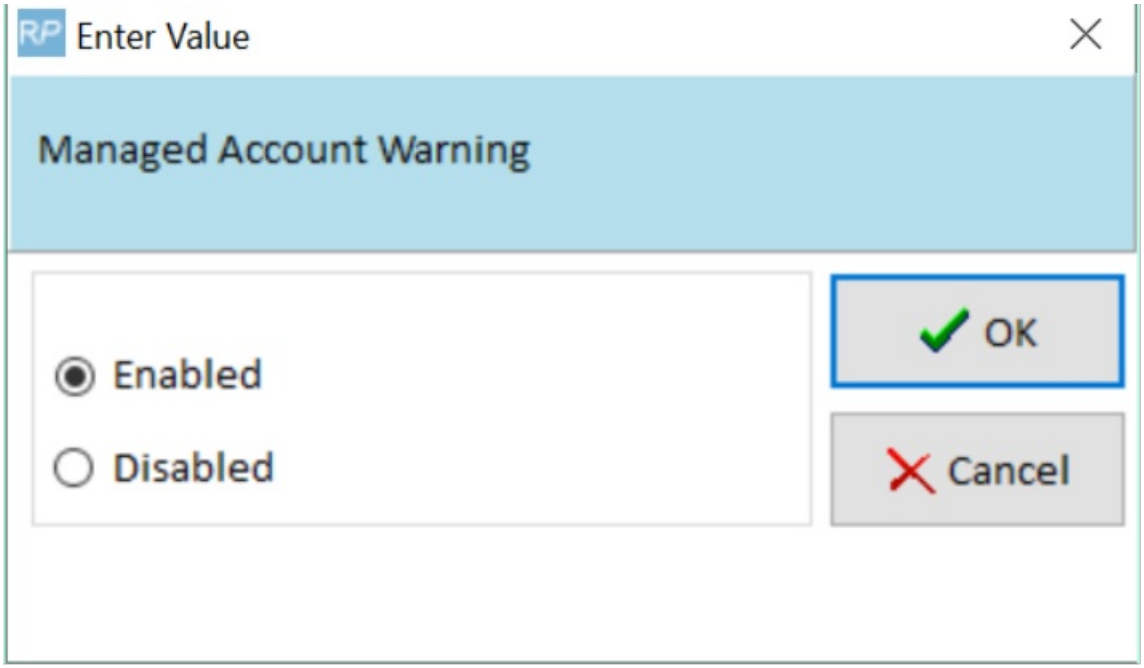
- Must be enabled



- Set to customer



- Managed Account Warning must be enabled

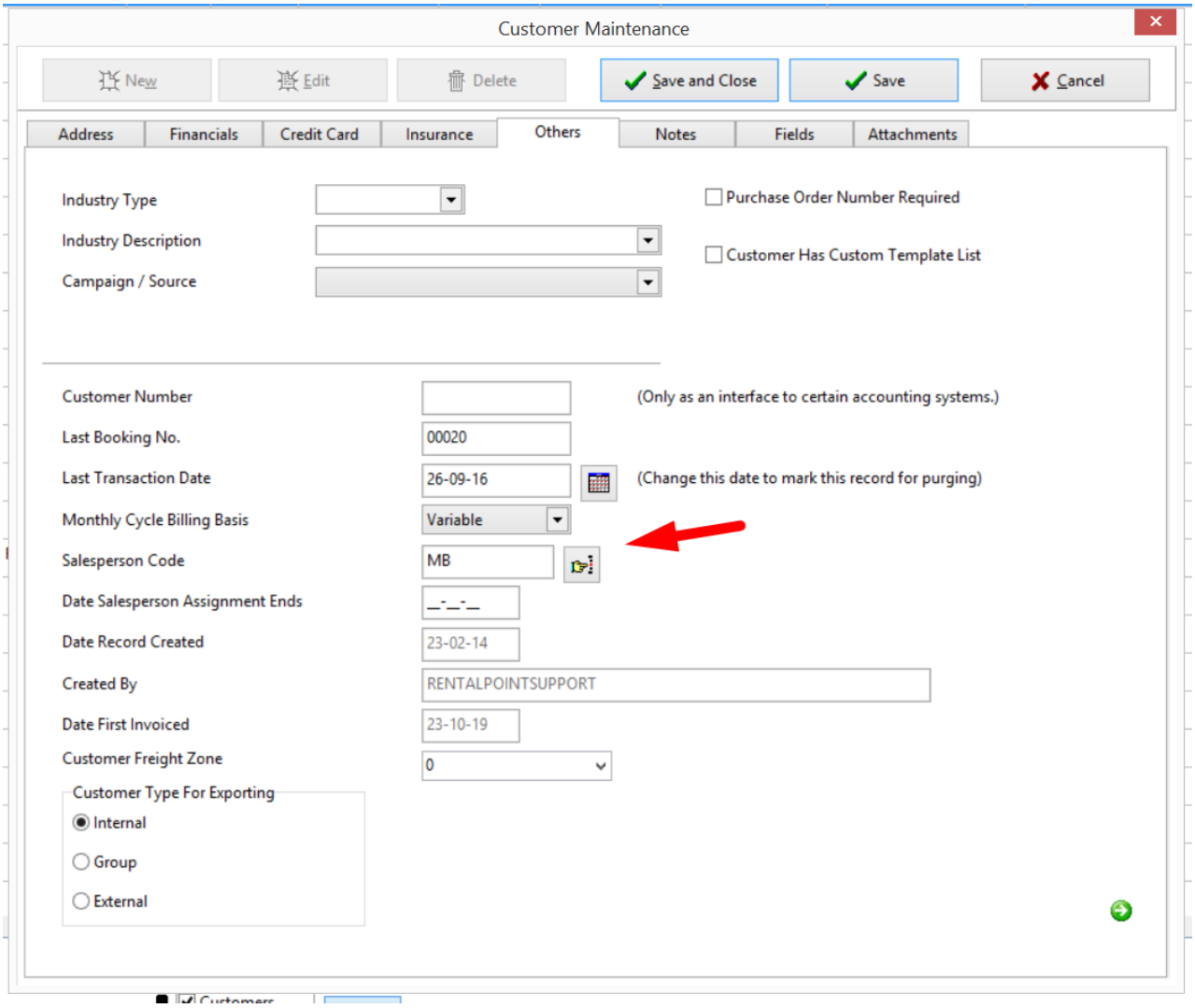
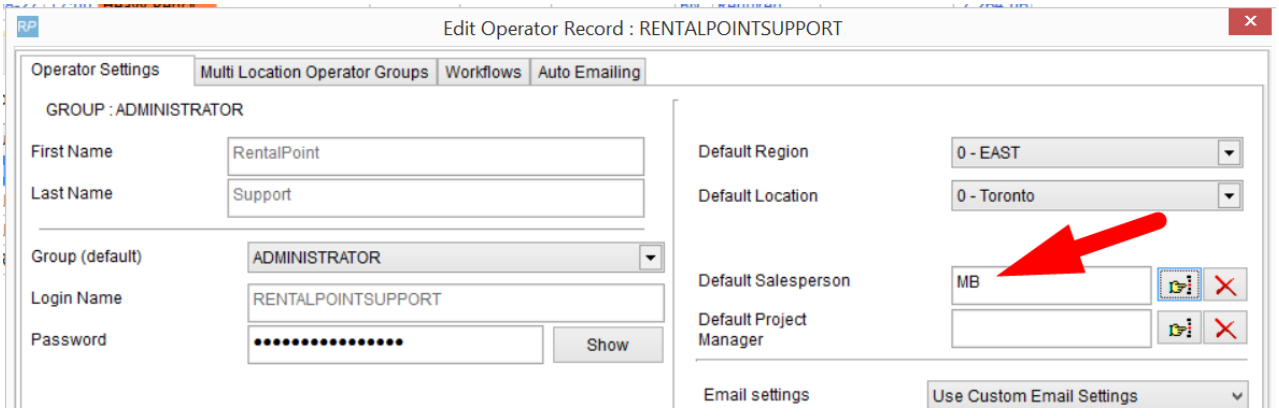


Defining a Managed Account

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 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.