

Managed Customer Account

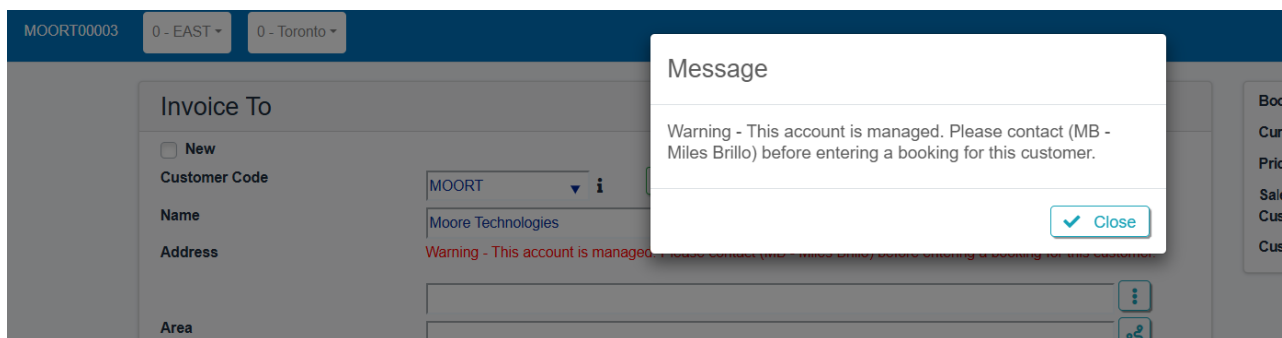
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When the default salesperson assigned to the *booking customer* differs from the salesperson assigned to the *current operator*, a warning will be displayed. The warning will advise the user to consult with the assigned salesperson before creating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

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 also be enabled

Salesperson Field Access

Enabled

☒

The Salesperson can either be assigned on a booking by booking basis or on the customer.

If this option is set to 'Booking' then each booking can have its' own Salesperson.

If this option is set to 'Customer' then all bookings for the same customer will have the same Salesperson, and this Salesperson is pulled from the Customer properties.

Salesperson Assigned To:

Customer

Default Booking Salesperson

When an operator enters a new booking, this option will default the Salesperson field. 'Initial Operator' will use the operator that's currently logged in. 'Operator Default' will use the Default Salesperson that's configured in the operator properties. If the salesperson default in the operator record is blank then no salesperson will be assigned to the booking.

Default Booking Salesperson:

Initial Operator

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

Name & Address

Customer Code

SOUNDB

☐ Hide/Disabled

Name

SoundByte Experience

Address

9987 Westhaven Way

Area

Toronto

City

Province

Ontario

Country

Canada

Post Code

K0K5P0

Email

soundbyte@gmail.com

Customer Type

Customer

☐ Vendor

Web

Contacts

Postal Address

Phones

Notes

Fields

Financials

Account Details

Others

Insurance

Attachments

Vendor Account #

Industry type

Industry Description

Last Booking No.

00020

Last transaction Date

09/16/2026

Salesperson Code

MB

Date Record Created

02/14/2023

Created By

RentalPoint Support

Date first invoiced

10/19/2023

☐ Purchase Order Number Required

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.

Operator



Operator Settings

Multi Location Operator Groups

Workflows

Auto Emailing

Group ADMINISTRATOR

First Name RentalPoint

Last Name Support

Group (default) ADMINISTRATOR

RentalPoint3 Password

☐ Access to Mobile Dashboard only

☒ Online Store Administrator

[Enable 2FA](#)

Must assign booking to PO before saving ☐

Maximum PO Approval Amount 7000

Maximum Cross Rental Approval Amount 5777

Maximum Rental Discount % 100

Maximum Sales Discount % 100

Default Region 0-EAST

Default Location 0-Toronto

Default Salesperson MB

Default Project Manager

Email Settings Use Custom Email Setting

Email Address mandyfox.mk@gmail.com

SMTP Address(Host) smtp.gmail.com

SMTP Port 587 SSL/TLS Not Us

☒ My smtp server requires authentication

[Send Test Email](#)

[Clear Store Password](#)

[Copy from Company Email Settings](#)

[Copy from Location Email Settings](#)

☒ System Administrator

☐ Disable Login