RentalPoint Email Functionality

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RentalPoint Email Functionality

Configuring 'Sender' Email Address in RentalPoint

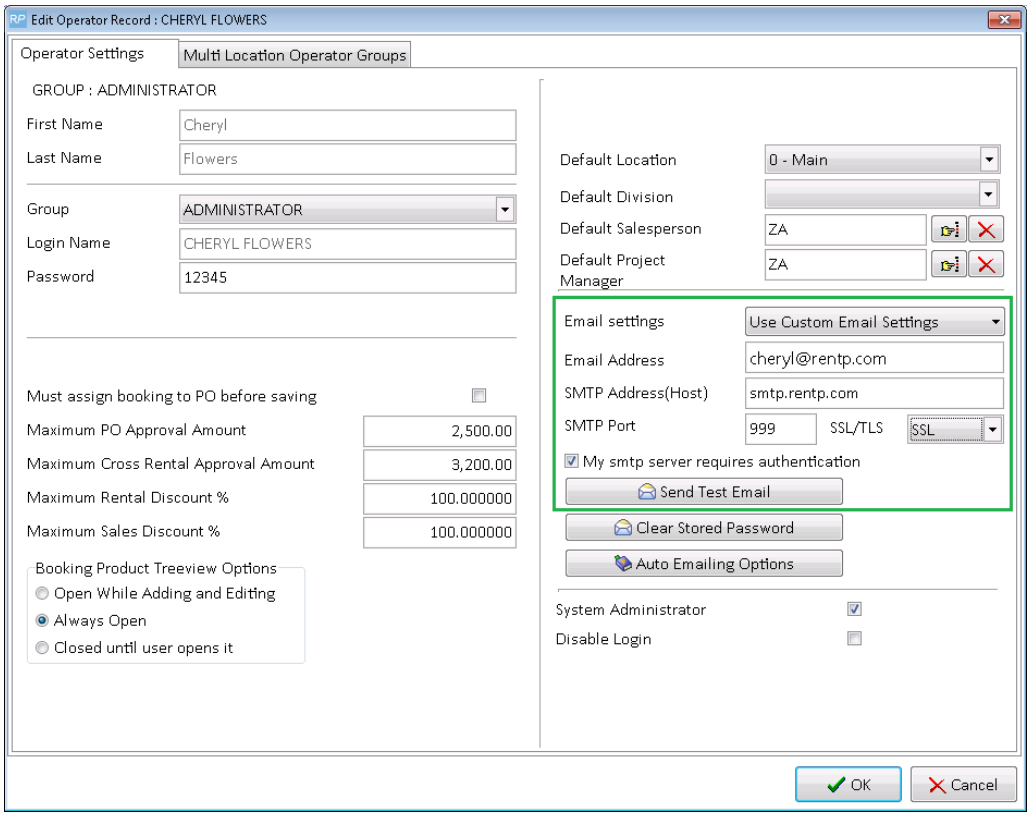
Users log into RentalPoint with an Operator Name and password. The Operator's email address is used as the 'sender' email address when emailing from RentalPoint to clients. The source you use for that address depends on how your company wants to utilize emailing within RentalPoint. Here's how each option works:

You can use a combination of the options above. For example, your warehouse staff may use a general email address such as warehouse@rentp.com; but your salespeople use their individual email accounts. In this scenario your warehouse staff are configured with **Company Email Settings** and your salespeople are configured with **Custom Email Settings**.

Custom Email Settings

Each operator has his/her own email address. When sending email, the email is delivered from the individual email account. Clients receive an email from a specific operator i.e. John Doe - john.doe@gmail.com

1. Go to Setup – Operators and open the operator record.
2. Select **Use Custom Email Settings** from the drop down list.
3. Enter the appropriate details and click **Send Test Email** to ensure the email settings work.
    a. Note: If using Microsoft Outlook on your workstation, leave your email settings blank. RentalPoint will pick up the Outlook Settings on the workstation you are logged in from, and use that email address when sending out emails.
4. Save and close the operator record.
5. Restart RentalPoint for the changes to take effect.

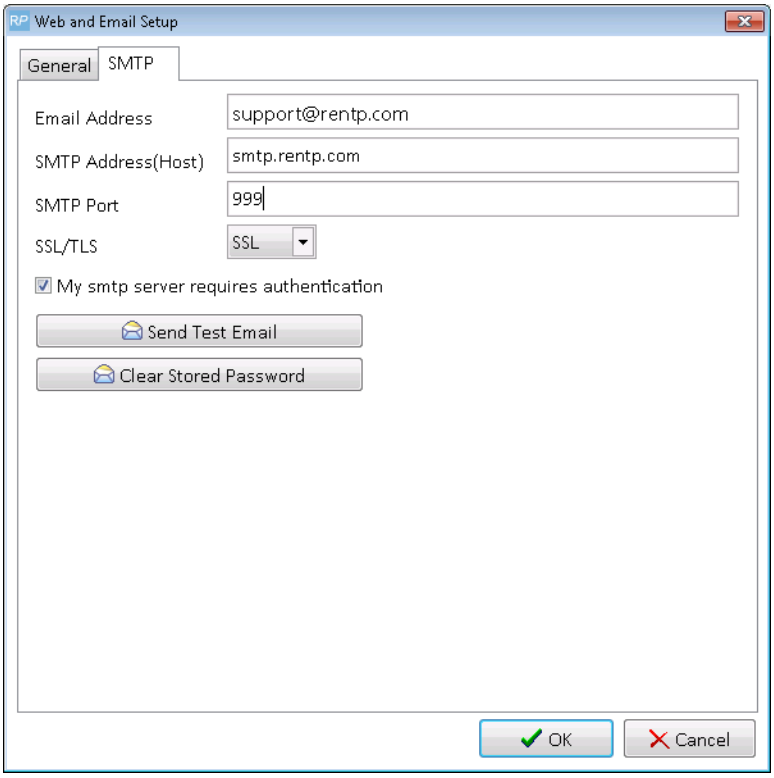


RentalPoint Email Functionality

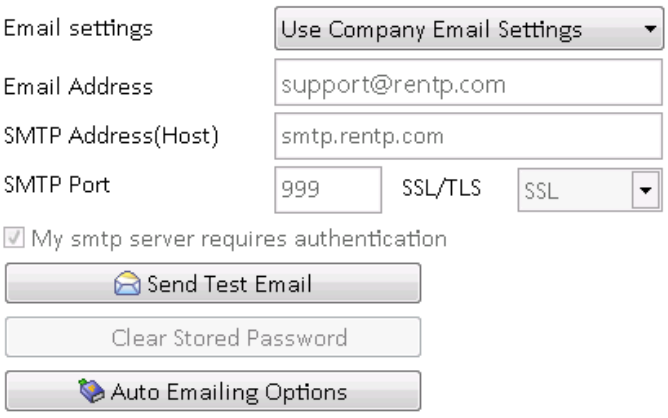
Company Email Settings

Operators share the same email address from Setup – Parameters – Web and Email. Clients receive an email from a general account i.e. RentalPoint Support – support@rentp.com

1. Go to Setup – Parameters – Web and Email and navigate to the SMTP tab.
2. Enter the appropriate details and click **Send Test Email** to ensure the email settings work.



3. Go to Setup – Operators and open the operator record.
4. Select **Use Company Email Settings** from the drop down list.
5. Save and close the operator record.
6. Restart RentalPoint for the changes to take effect.

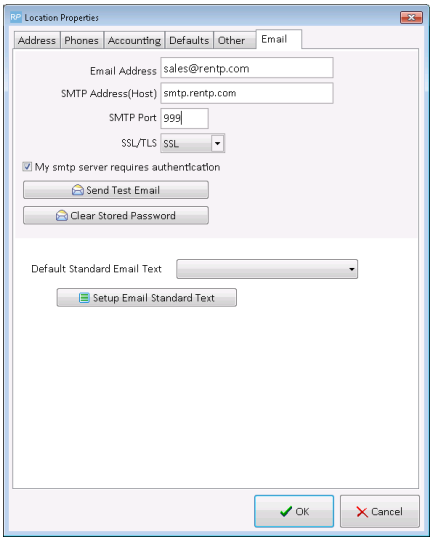


RentalPoint Email Functionality

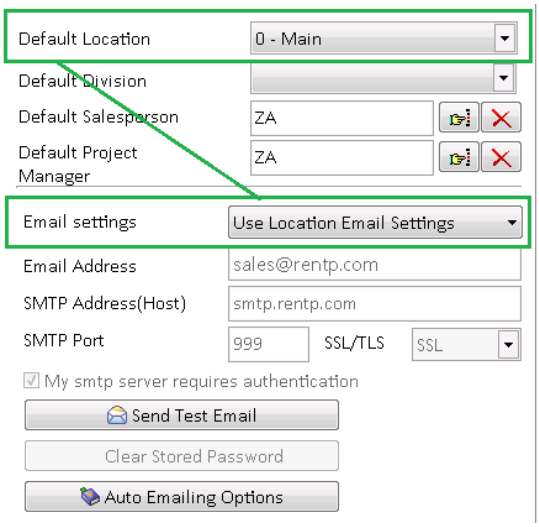
Location Email Settings

Each operator is configured with a default location. The operator uses the email address from his/her default location. The location email is configured in Setup – Locations. Clients receive an email from a general account i.e. Warehouse – warehouse@rentp.com , Sales – sales@rentp.com

1. Go to Setup – Locations, open the location record and navigate to the Email tab.
2. Enter the appropriate details and click **Send Test Email** to ensure the email settings work.



3. Go to Setup – Operators and open the operator record.
4. Select **Use Location Email Settings** from the drop down list.
5. Save and close the operator record.
6. Restart RentalPoint for the changes to take effect.



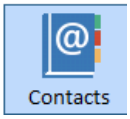
RentalPoint Email Functionality

Auto Email on Product Modification

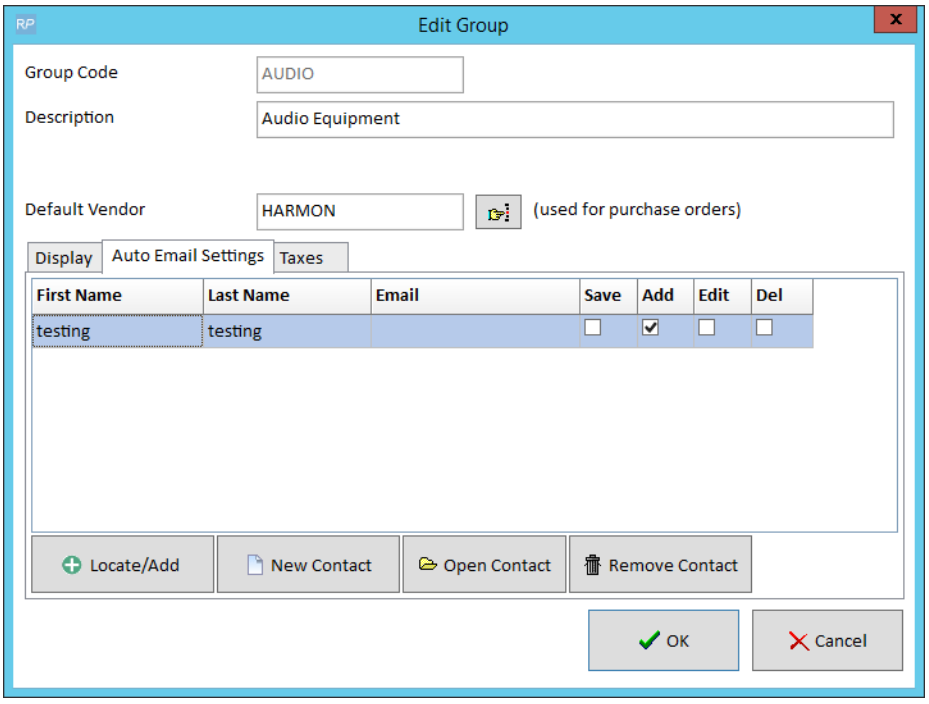
RentalPoint offers the ability to automatically email a list of contacts based on use of a given product group within any booking.

There is no parameter to control this functionality. Simply put; If the user is on the list, the system will automatically email recipients as per the product 'Auto Email Settings'. If there's no one in the list, no emails will be sent.

Configuration:



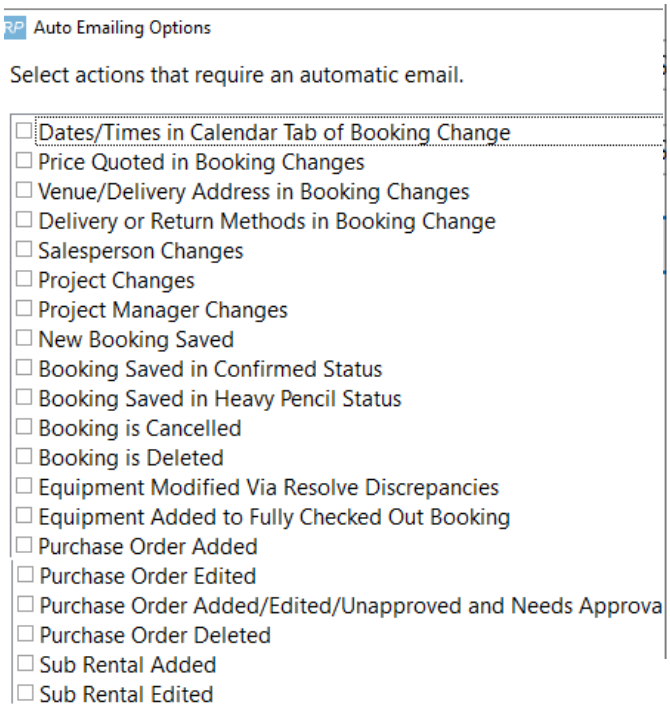
1. Setup all applicable contacts in the Contacts Menu.
2. Edit the group and add the contact to the Auto Email Settings.
   - The check boxes will determine when the contact is emailed.
   - 'Add', will only email a contact when equipment from this group is **first** added to the booking.
   - 'Edit', will email the contact each time changes are made to products in this group, on the booking.
   - 'Del', will email the contact only when **ALL** equipment for that group is deleted from the booking.

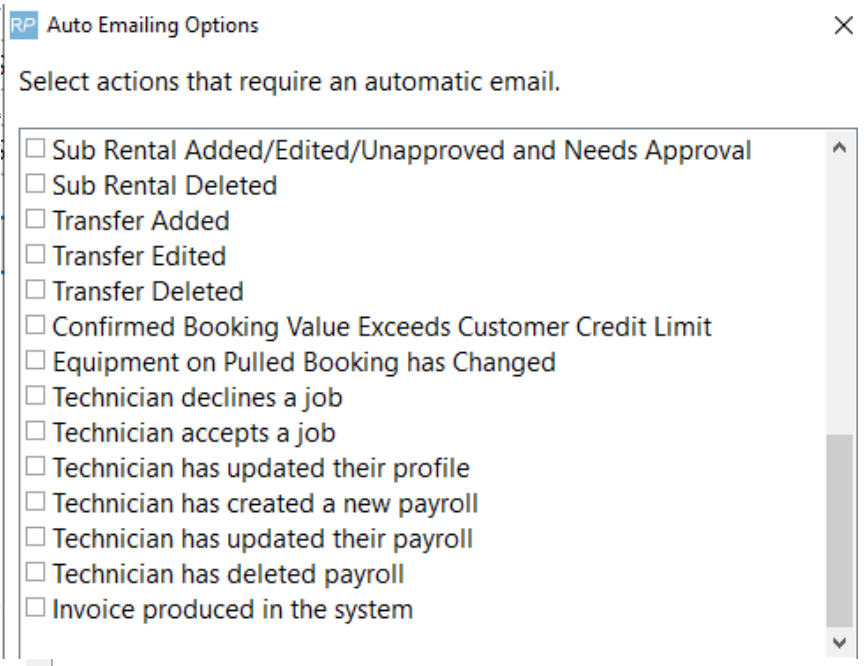


RentalPoint Email Functionality

Auto Email Operator Group/Individual Operators

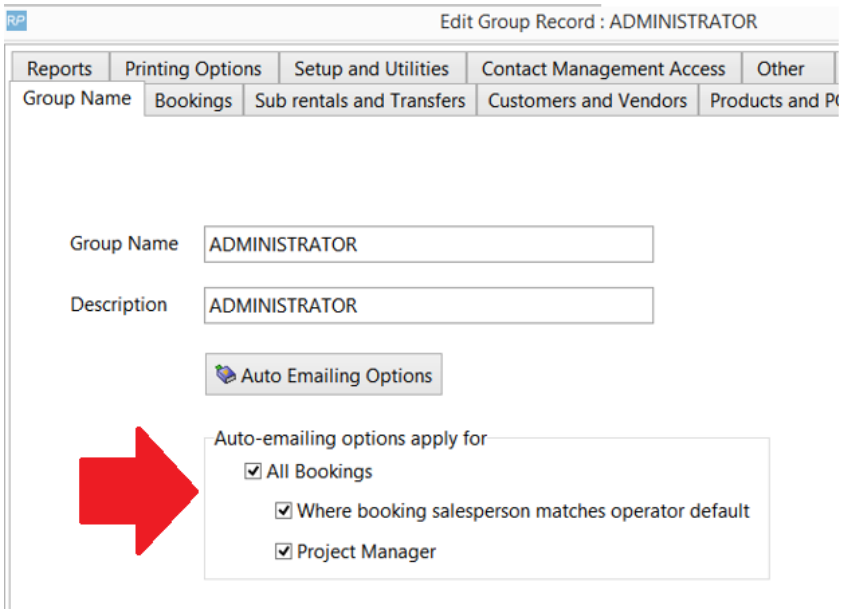
RentalPoint offers the ability to automatically email operators when certain actions are executed in the system. For example, you may want to notify the warehouse manager if the dates and times of an upcoming booking have changed. Below is a complete list of actions that can trigger an auto email to an operator.



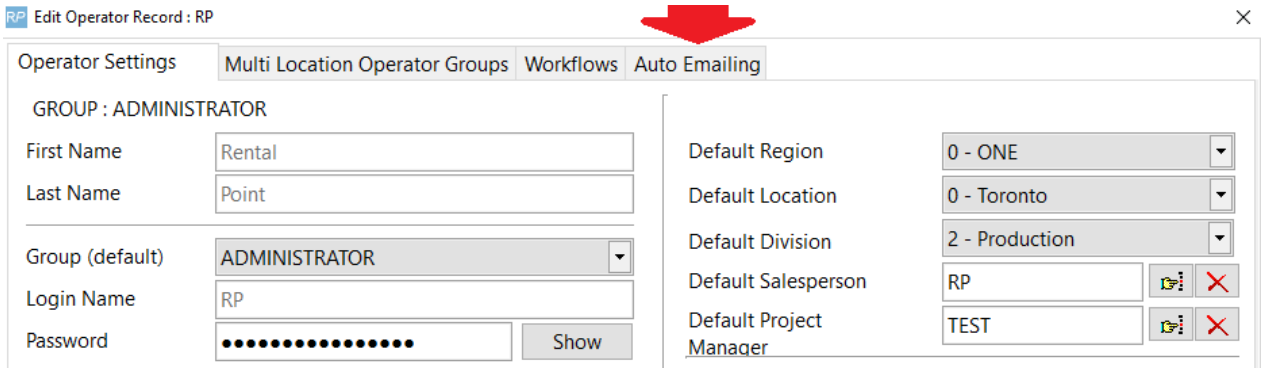


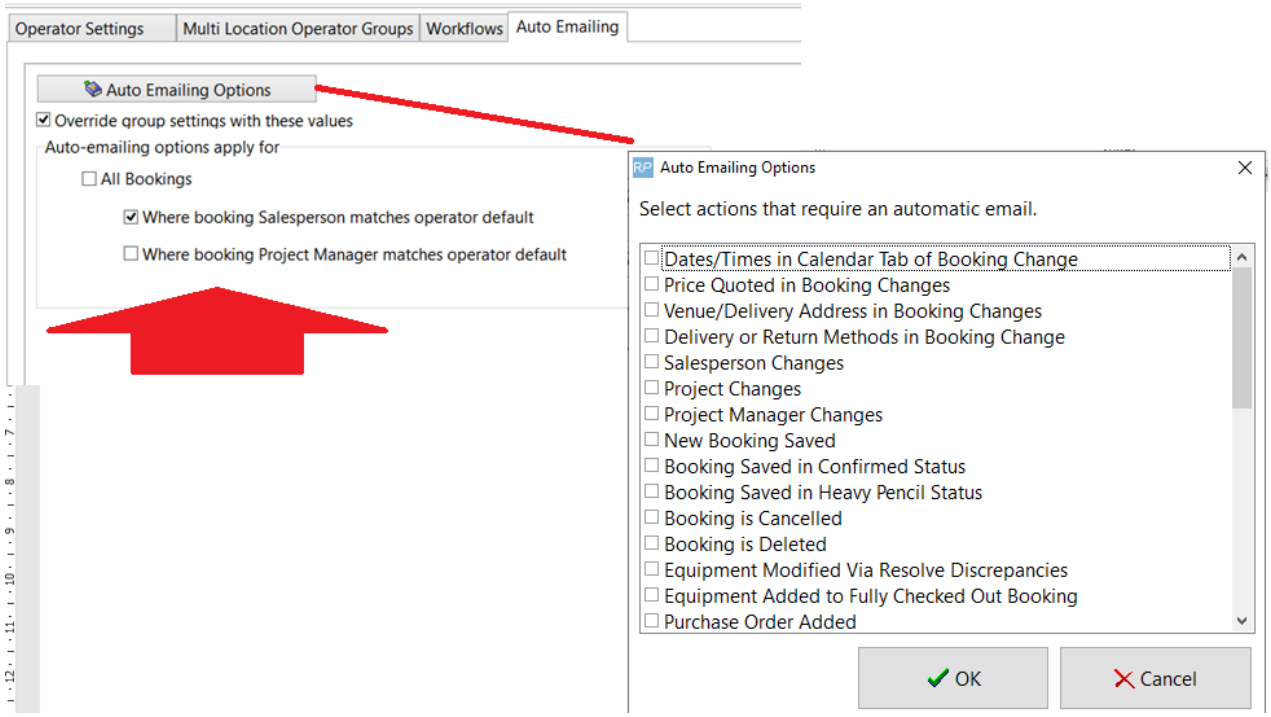
Configuration:

- First, enable Operation Parameter 24 (remember to log out and back into RentalPoint once set)
- Next, ensure you have valid email and SMTP settings entered for the operator (see 'configure sender email address' section in this document for further instruction on this step)
- Goto Setup→Operators. There are two ways to set auto email actions;
  - Group Level
    - To apply auto email options to the group, open the group and click Auto Emailing Options. This will allow you to apply settings to all operators in this group. It is much faster and easier than setting individual operator options. The Outlook security warning will be displayed if the user is having problems sending email.
    - In order to cut down on notifications that are not relevant to the user, auto-emailing can be restricted to only include the bookings where an operator is the salesperson or project manager on the booking. These restrictions can be set on the Group or Operator Level.



- Operator Level
  - To apply auto email options to an individual operator, open the operator record and click the 'Auto Emailing' tab. The changes you make will only apply to the operator you are editing.




Operator Settings
Multi Location Operator Groups
Workflows
Auto Emailing
Auto Emailing Options
Override group settings with these values
Auto-emailing options apply for
All Bookings
Where booking Salesperson matches operator default
Where booking Project Manager matches operator default
Auto Emailing Options
Select actions that require an automatic email.
Dates/Times in Calendar Tab of Booking Change
Price Quoted in Booking Changes
Venue/Delivery Address in Booking Changes
Delivery or Return Methods in Booking Change
Salesperson Changes
Project Changes
Project Manager Changes
New Booking Saved
Booking Saved in Confirmed Status
Booking Saved in Heavy Pencil Status
Booking is Cancelled
Booking is Deleted
Equipment Modified Via Resolve Discrepancies
Equipment Added to Fully Checked Out Booking
Purchase Order Added
OK
Cancel

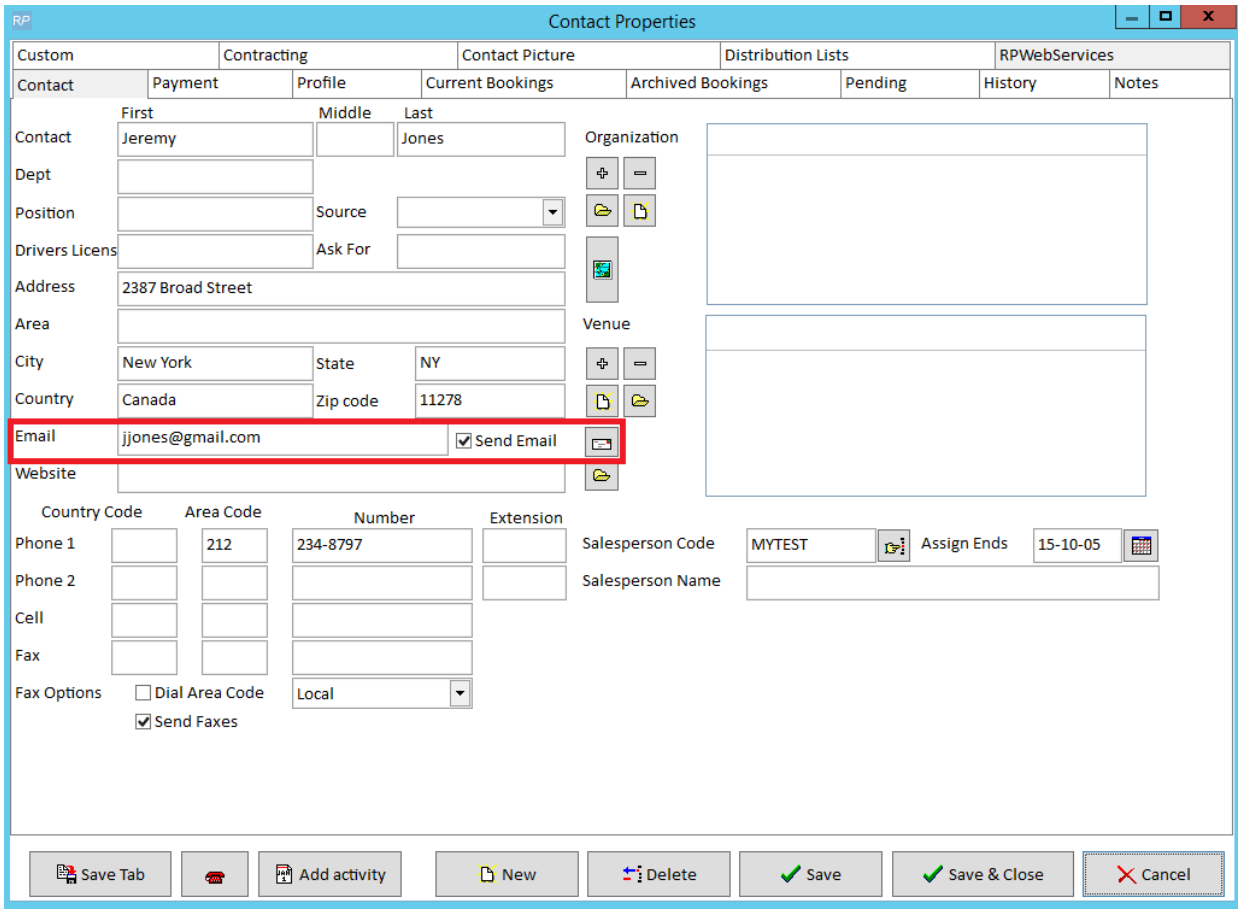
RentalPoint Email Functionality

Auto Email Technicians

If using Crew Planner, you may want to consider the Auto Email Technicians feature to automatically email technicians on job assignments and changes.

Configuration:

- Set Crew Structure Parameter 19 – 'Auto Email Technicians' to ON
- Ensure the technician has a valid email *and* the Send Emails box is ticked within their contact record.
- Each time any of their job assignments change, they will be automatically emailed with the new details.



Consider also RP WebServices Functionality:

1. Configuring RPWebServices - http://www.rentp.com/KnowledgebasePDFs/How%20to%20Configure%20RPWS.pdf
2. Using RPWebServices - http://www.rentp.com/KnowledgebasePDFs/How%20to%20Use%20RPWS.pdf
3. Webservices Video Demo - https://www.youtube.com/watch?v=SPeIiJcXoMU

RentalPoint Email Functionality

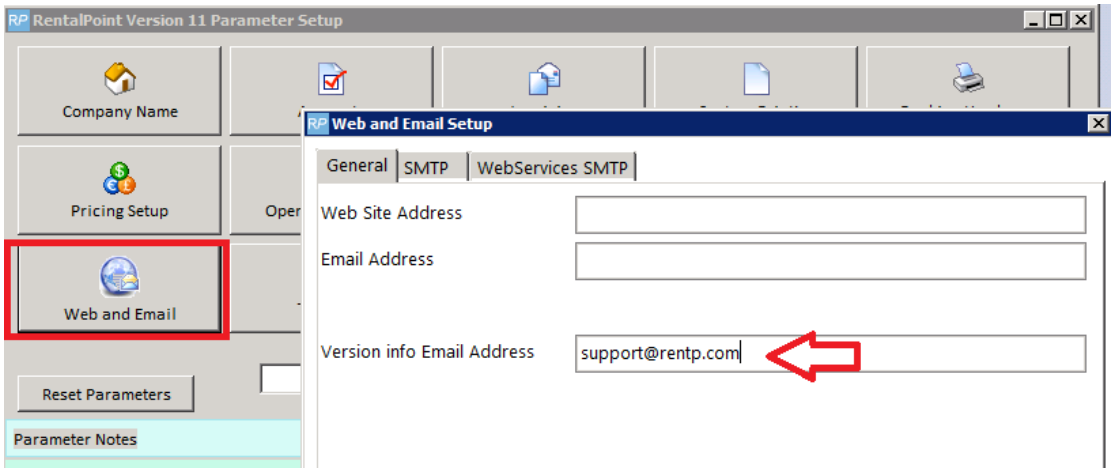
Auto Email RentalPoint Job Files

With Operational Parameter 185 set, RentalPoint will save a text file of the booking every time the booking is saved. This text file is called a job file and is stored to the DOCS/jobs folder.

RentalPoint now offers the functionality to automatically email job files as they are created. These job files can be used to import booking information to some third party software, depending on the flexibility of that software.

Configuration

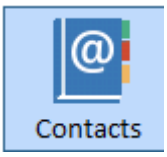
1. Goto Setup→parameters→Web and Email
2. Set the Version Info Email Address to the email account you want all job files to go to (remember to have all users log out and back in to RentalPoint for changes to take effect for all users)



3. Every time a booking is saved, an email will be sent with a *from address* as set up in each users operator record and a *To Address* as set up in the 'Version info Email Address'.
4. Subject of the email will be 'Job (version) file for booking : <Booking Number>'

RentalPoint Email Functionality

Building an Email Distribution List

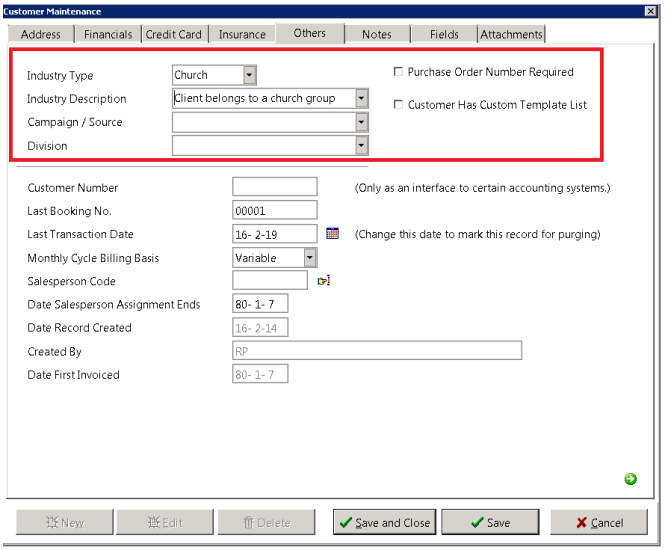


RentalPoint offers the ability to build a distribution list using information you have stored in each customer record.

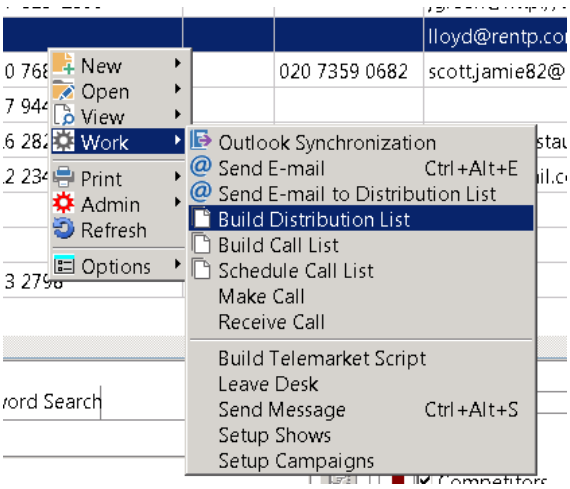
You will need access to the Contacts Menu to avail of this option

Let's use Industry type as an example.

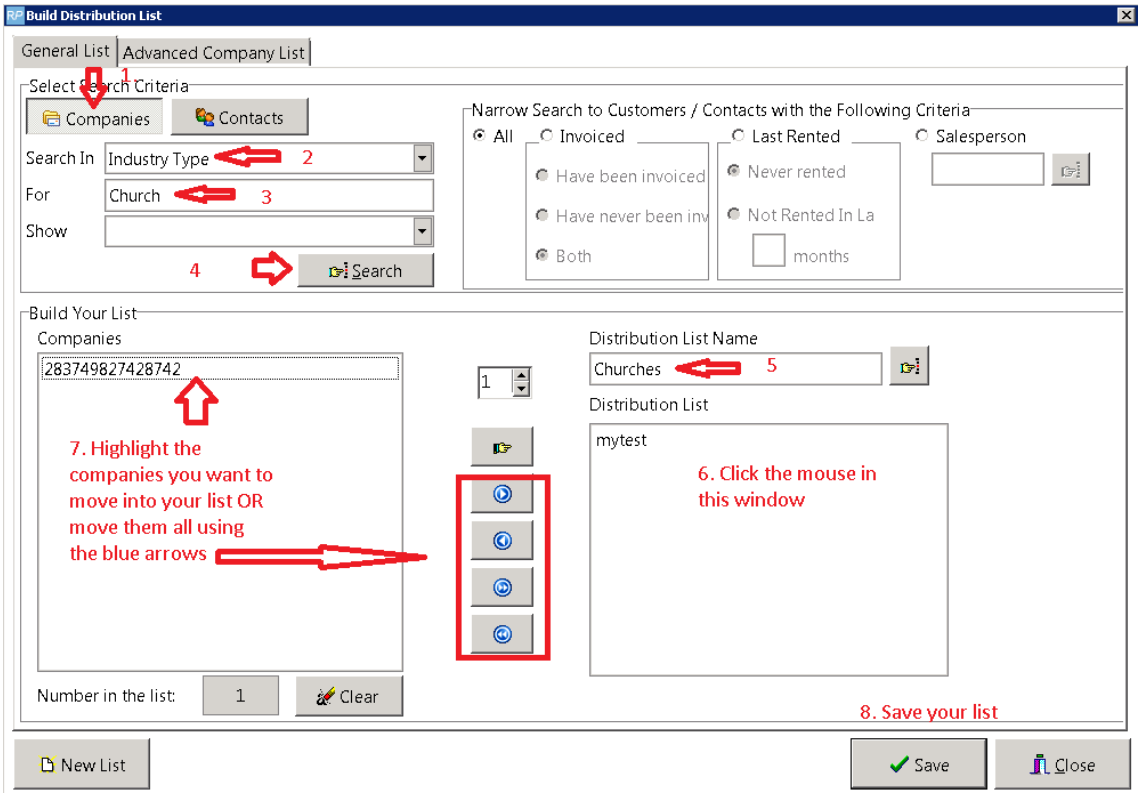
1. In each customer record, add a value for Industry Type. You don't need to set this up anywhere. Just type a value in the field and RentalPoint will build a drop down list for you.

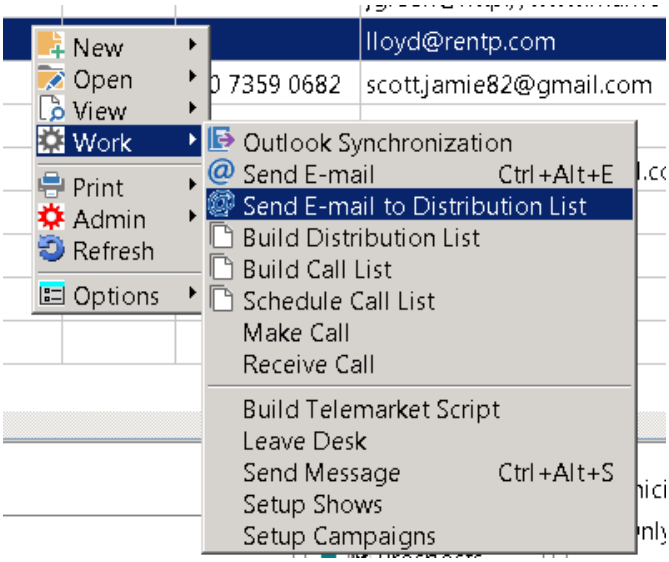


2. Click on CONTACTS menu
3. Then right click →work→Build Distribution list



4. Follow steps one thru seven below



Sending an Email to your Distribution List

Right Click on the Contacts Grid to activate the menu, then click 'Send E-mail to Distribution List'