



Email Template Setup

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What is discussed in this document?

In the following document you will find information on the following:

1. Overview of options to send emails out of integraRental
2. Setup instructions for each email option
3. Information on what integraRental needs to setup your email options

What can I email from integraRental?

There are multiple areas of opportunity to send emails directly out of integraRental.

1. eRental Email notifications (not pictured)
2. Prepayment and/or Signature Capture
3. Send New Sale Quote or Sales Receipt
4. Send Copy of Rental Agreement

Agreement - 3110 Location - Bettendorf Created By - rentaladmin 4/30/2019

Type Rental Start 4/28/2019 11:18 AM End 4/29/2019 11:18 AM Billing Mode POS Billing

Assign Credit Card

Customer Delivery/Job Info Comments Dispatch Override Log Attachments Billing PrePayments \$0.00

Pay Online Pay Online & Sign Sign Only Print Add

Date	Amount	Type	Reference#	Transaction Type	Created Date	Created By
No items to display						

Trans	Item#	Description	Qty	Deposit	Est Return	Taxable	Actual Return	Est Price	Est Extension	Action
Rental	TomrTest-025	TomrTest Product - Main	1	\$10.00	4/29/2019 11:18 AM	<input checked="" type="checkbox"/>	4/29/2019 11:18 AM	\$145.00	\$145.00	Change Item Loca...

Deposit Total: \$10.00 Product Total: \$0.00 Service Total: \$0.00 Rental Total: \$145.00 Tax Total: \$9.79 Total: \$154.79

Add Product Add Service Item Return All Check In Detail Check In List Print Agreement View PDF Send PDF POS Billing Switch to Start Mode

Trans	Item#	Description	Qty	Deposit	Est Return	Taxable	Actual Return	Est Price	Est Extension	Action
P	Batteries - AA 10 Pk		1	\$11.11		<input type="checkbox"/>		\$11.11		Edit

Total Service: \$0.00 Total Product: \$11.11 Total Tax: \$0.00 Total: \$11.11

Search Quotes Search Past Sales Delete Print Email Tender Sale

Trans	Item#	Description	Qty	Deposit	Est Return	Taxable	Actual Return	Est Price	Est Extension	Action
Rental	TomrTest-025	TomrTest Product - Main	1	\$10.00	4/29/2019 11:18 AM	<input checked="" type="checkbox"/>	4/29/2019 11:18 AM	\$145.00	\$145.00	Change Item Loca...

Deposit Total: \$10.00 Product Total: \$0.00 Service Total: \$0.00 Rental Total: \$145.00 Tax Total: \$9.79 Total: \$154.79

Add Product Add Service Item Return All Check In Detail Check In List Print Agreement View PDF Send PDF POS Billing Switch to Start Mode

Prepayment and Signature capture email

If you are using our integrated Credit Card services with CenPOS you can now email customers a request for Prepayment, Prepayment with a Signature, or just a Signature. To do so you will go to the PrePayments tab on the rental agreement screen. Emails received by the customer will provide them with a button that will take them to a webpage where they can Pay, Pay and Sign, or just Sign for the rental agreement.

Wed 5/1/2019 12:16 PM
 IN integraRental Notification Mail
 Rental PrePayment Request for Agreement 3094
 To Tom Rockwell

(3094)-Rental_Agreement.PDF
 209 KB

Agreement No	Amount	
3094 (5/11/2019 8:01 AM - 5/11/2019 11:00 PM)	\$205.48	Pay Now

Please click Pay Now to pay your invoice now with your credit card.
 Thank you for your business

Wed 5/1/2019 12:16 PM
 IN integraRental Notification Mail
 Rental PrePayment Request for Agreement 3094
 To Tom Rockwell

(3094)-Rental_Agreement.PDF
 209 KB

Agreement No	Amount	
3094 (5/11/2019 8:01 AM - 5/11/2019 11:00 PM)	\$205.48	Pay Now

Please click Pay Now to pay your invoice now with your credit card.
 Thank you for your business

Wed 5/1/2019 3:34 PM
 IN integraRental Notification Mail
 Signature Request for Agreement 3120
 To Tom Rockwell

(3120)-Rental_Agreement.PDF
 209 KB

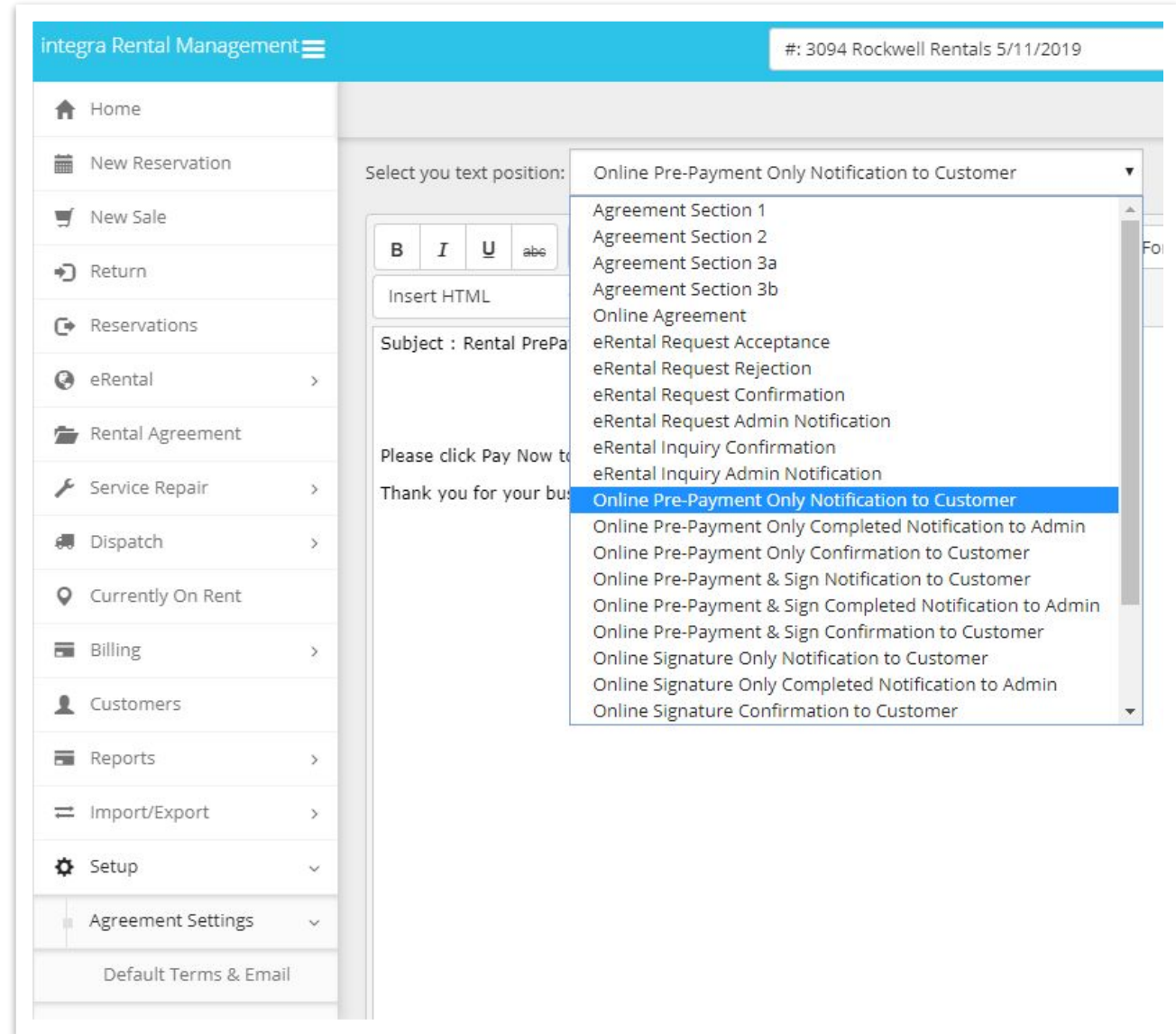
Agreement No	
3120 (5/3/2019 3:33 PM - 5/4/2019 3:33 PM)	click to Sign

Dear ,
 Please click to sign for rental agreement terms and conditions.
 Thank you for your business,

Rock Solid Rental
 2547 Tech Drive
 Bettendorf, IA 52722
 563-332-5030
info@rocksolidrental.com

Email Templates Setup – Overview

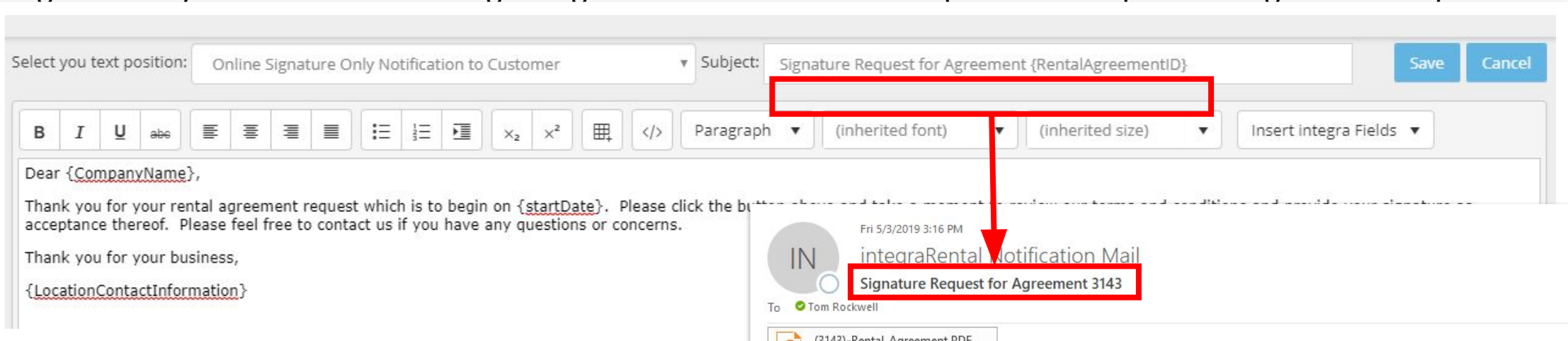
There are multiple email templates available for each email feature, based on what stage of the process the email represents, and who the email audience will be. All of the templates have a similar setup and layout, which is described in the following slides.



The screenshot displays the 'Integra Rental Management' interface. On the left is a navigation sidebar with the following menu items: Home, New Reservation, New Sale, Return, Reservations, eRental, Rental Agreement, Service Repair, Dispatch, Currently On Rent, Billing, Customers, Reports, Import/Export, Setup, Agreement Settings, and Default Terms & Email. The main content area shows a configuration screen for an email template. At the top right, it indicates '#: 3094 Rockwell Rentals 5/11/2019'. Below the header, there is a 'Select your text position:' dropdown menu currently set to 'Online Pre-Payment Only Notification to Customer'. Below this is a rich text editor with buttons for Bold (B), Italic (I), Underline (U), and a link icon (abc), along with an 'Insert HTML' button. The editor contains the text: 'Subject : Rental PrePa', 'Please click Pay Now to', and 'Thank you for your bus'. A dropdown menu is open, listing various email templates, with 'Online Pre-Payment Only Notification to Customer' selected and highlighted in blue. Other visible templates include Agreement Section 1-3b, Online Agreement, eRental Request Acceptance/Rejection/Confirmation/Admin Notification, eRental Inquiry Confirmation/Admin Notification, Online Pre-Payment Only Completed Notification to Admin, Online Pre-Payment Only Confirmation to Customer, Online Pre-Payment & Sign Notification to Customer, Online Pre-Payment & Sign Completed Notification to Admin, Online Pre-Payment & Sign Confirmation to Customer, Online Signature Only Notification to Customer, Online Signature Only Completed Notification to Admin, and Online Signature Confirmation to Customer.

Email Template Setup – Subject

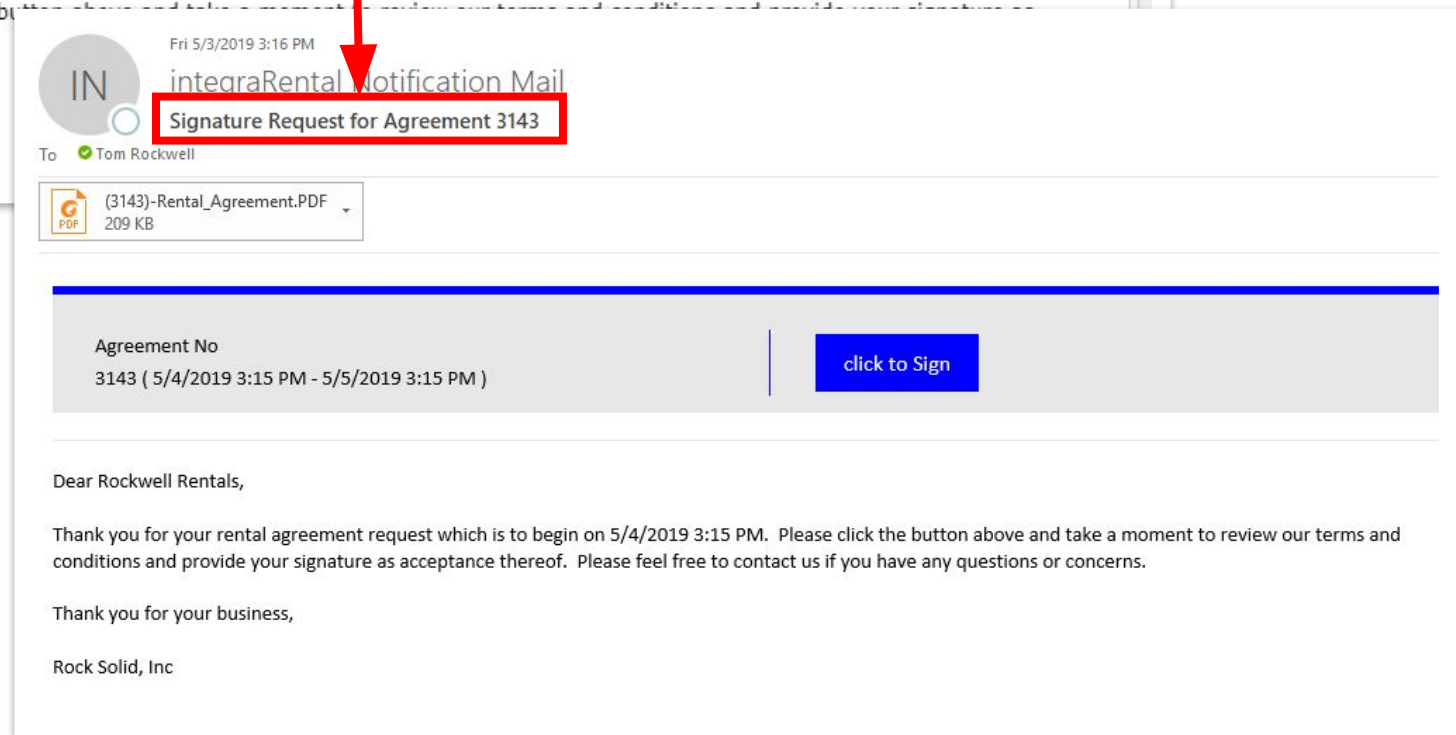
Each email template has a section for the Subject and the Body of the email to be sent. Using the dropdown menu labeled “Insert integra Fields” allows you to pull in information about the specific Location, Customer, and Rental Agreement you are communicating in regards to. Below is an example of the request for signature template.



Select your text position: Online Signature Only Notification to Customer Subject: Signature Request for Agreement {RentalAgreementID} Save Cancel

B I U abs Paragraph (inherited font) (inherited size) Insert integra Fields

Dear {CompanyName},
Thank you for your rental agreement request which is to begin on {startDate}. Please click the button above to accept the agreement and provide your signature as acceptance thereof. Please feel free to contact us if you have any questions or concerns.
Thank you for your business,
{LocationContactInformation}



Note: The integraFields drop down does not place the integraField tag in the Subject line area. Set your cursor somewhere in the Body area, and after you choose the integraField you would like to see in the Subject line, cut and paste it from the Body section of the email template. See the integraFields guide on the next slide.

Email Template Setup – integraFields

CompanyName – Rental Company Name Field
Customer – Rental Company Name Field
RequestId – Rental Agreement ID Number
eRentalRequestID – Rental Agreement ID Number
RentalAgreementID – Rental Agreement ID Number
comment - Unknown
invoice_no – Rental Agreement ID Number
startDate – Rental Agreement Start Date from Header
endDate – Rental Agreement End Date From Header
balance_due – Balance Requested Via Pay &/or Pay & Sign email
content – Used to convey “Body” message when sending Rental Agreement .pdf file
url – Link to Pay & Sign web page
Address1 – Rental Customer Billing Address 1
Address2 – Rental Customer Billing Address 2
City – Rental Customer Billing Address City
State – Rental Customer Billing Address State
Zip – Rental Customer Billing Address Zip Code
Companyphone – Rental Customer Company Phone Number
CompanyEmail – Rental Customer Company Email
ContactName – Rental Customer Contact Name
ContactPhone – Rental Customer Contact Phone Number
ContactEmail – Rental Customer Contact Email Address

PhoneNumber– Rental Customer Company Phone Number
ContactInformation – Rental Customer Company Name, Address, Phone, & Email in email signature layout
PrepaymentAmount – Prepayment Amount Requested
Warehouse – Rental Location Rental Agreement originating from
LocationAddress1 – Rental Company Location Address 1
LocationAddress2 – Rental Company Location Address 2
LocationCity – Rental Company Location City
LocationState – Rental Company Location State
LocationZip – Rental Company Location Zip Code
LocationPhone – Rental Company Location Phone Number
LocationEmail – Rental Company Location Admin Email Address
LocationContactInformation – Rental Company Location Name, Address, Phone, & Email in email signature layout
ThankYouText – Thank you text from App Settings (requires integraRental Support Assistance)
SalesmanName – Sales Rep name assigned to Rental Agreement
SalesmanNumber – Sales Rep ID number assigned to Rental Agreement

Email Template Setup – Message

As discussed in the previous slide, the combined use of static text and the integra Fields can provide the email recipient with a personalized email experience without having to edit every email sent. Below you will find an example of a message template you could use to get started.

Pay Only Template – Request to Customer

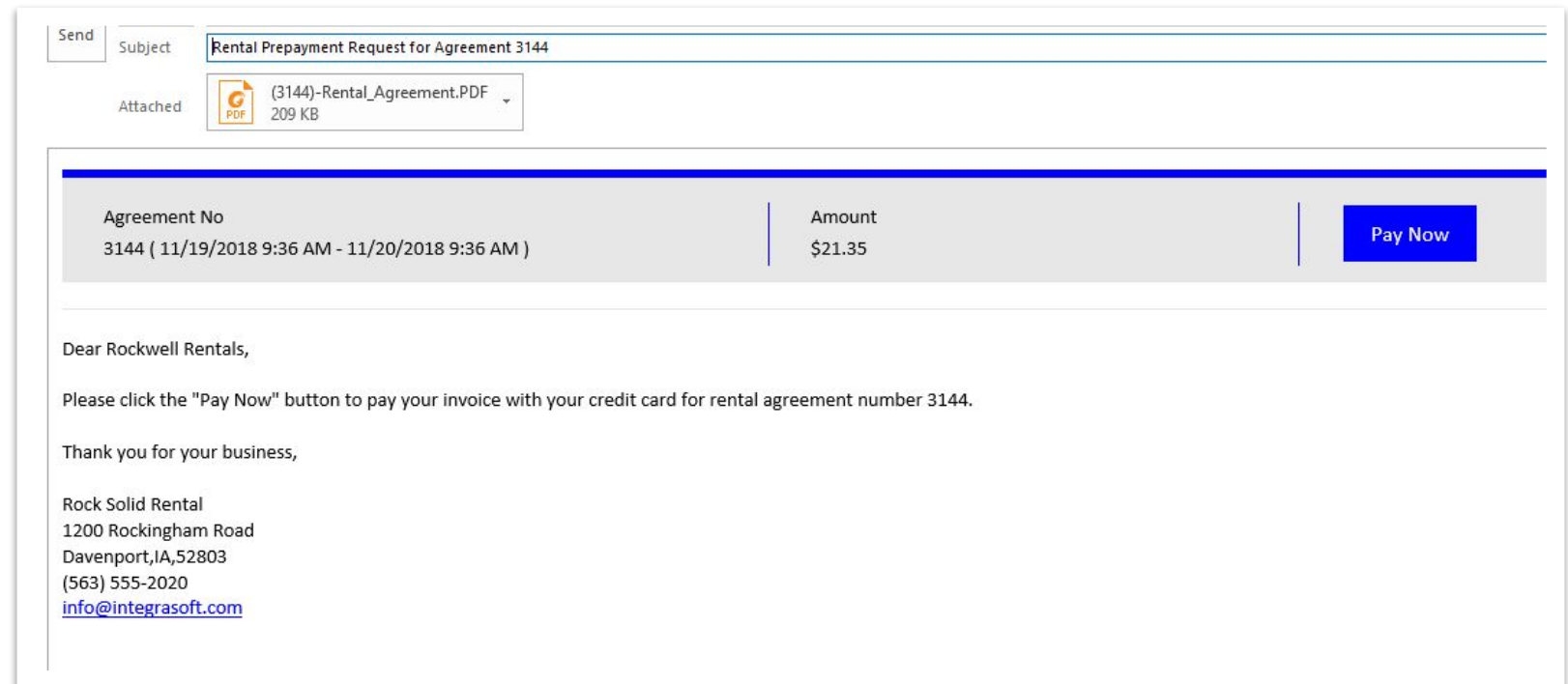
Subject: Rental Prepayment Request for Agreement {RentalAgreementID}

Message: Dear{CompanyName},

Please click the “Pay Now” button to pay your invoice with your credit card for rental agreement number{RentalAgreementID}.

Thank you for your business,

{LocationContactInformation}



Send Subject Rental Prepayment Request for Agreement 3144

Attached (3144)-Rental_Agreement.PDF 209 KB

Agreement No	Amount	
3144 (11/19/2018 9:36 AM - 11/20/2018 9:36 AM)	\$21.35	Pay Now

Dear Rockwell Rentals,

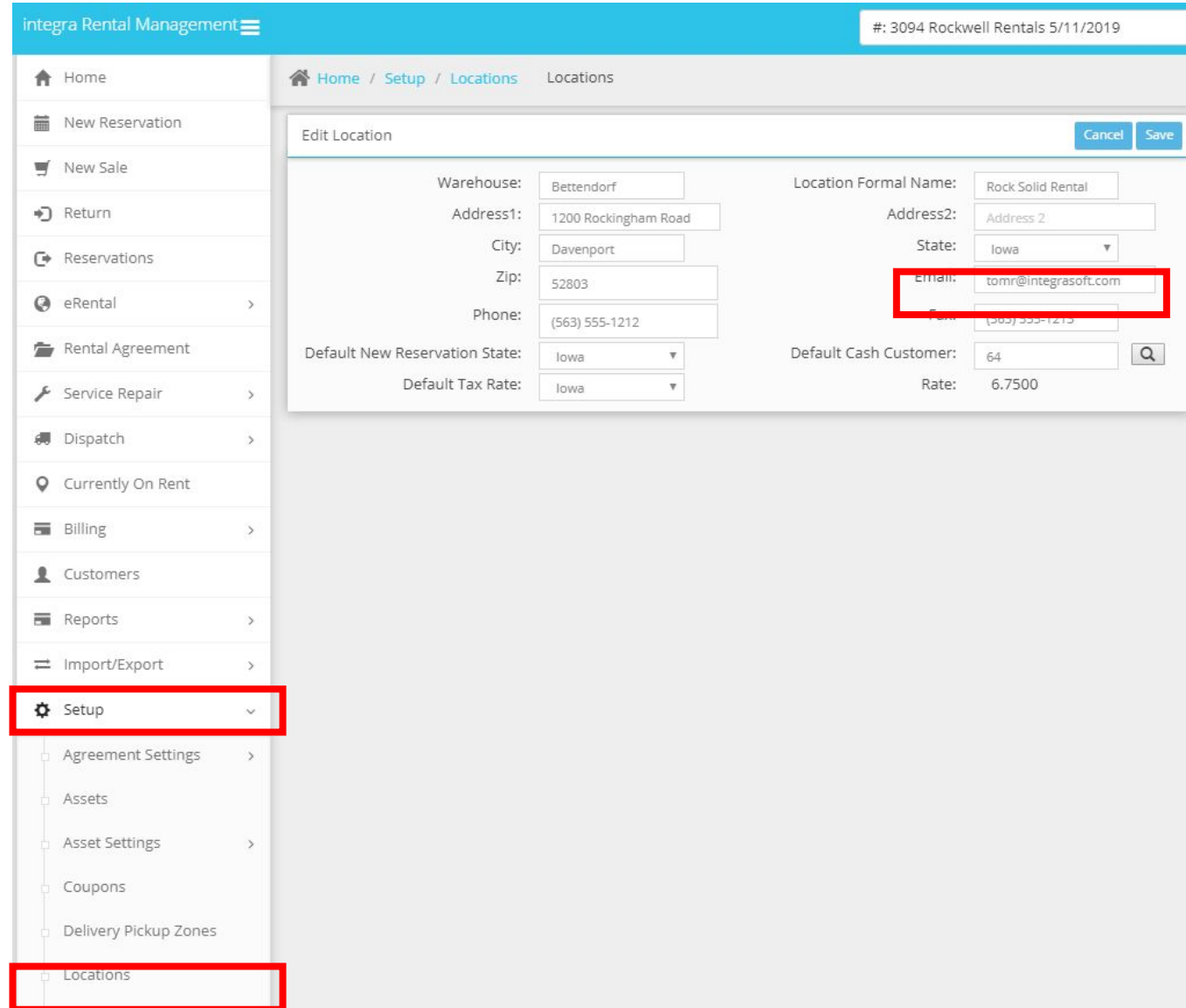
Please click the "Pay Now" button to pay your invoice with your credit card for rental agreement number 3144.

Thank you for your business,

Rock Solid Rental
 1200 Rockingham Road
 Davenport, IA, 52803
 (563) 555-2020
info@integrasoft.com

Email Template Setup – Notification to Admin

The “Notification to Admin” template determines what is sent to the email address setup on the Location screen that coincides with the Location that the rental agreement is coming from. You can edit the Location email address by going to Setup/Locations from the main menu and editing the Email: section of a Location’s detail page.



The screenshot displays the 'Integra Rental Management' interface. The top navigation bar shows the current location: '#: 3094 Rockwell Rentals 5/11/2019'. The left sidebar contains a menu with the following items: Home, New Reservation, New Sale, Return, Reservations, eRental, Rental Agreement, Service Repair, Dispatch, Currently On Rent, Billing, Customers, Reports, Import/Export, Setup, Agreement Settings, Assets, Asset Settings, Coupons, Delivery Pickup Zones, and Locations. The 'Setup' and 'Locations' items are highlighted with red boxes. The main content area shows the 'Edit Location' form for 'Rock Solid Rental'. The form includes fields for Warehouse (Bettendorf), Address1 (1200 Rockingham Road), City (Davenport), Zip (52803), Phone ((563) 555-1212), Location Formal Name (Rock Solid Rental), Address2 (Address 2), State (Iowa), Email (tomr@integrasoft.com), Default New Reservation State (Iowa), Default Cash Customer (64), Default Tax Rate (Iowa), and Rate (6.7500). The 'Email' field is highlighted with a red box.

Email Template Setup – Suggested Verbiage

Pay Only Verbiage

Request to Customer

Subject: Rental Payment Request for Agreement {RentalAgreementID}

Body: Dear {CompanyName},

Please click the "Pay Now" button to submit your credit card payment of {PrepaymentAmount} for rental agreement {RentalAgreementID}.

Thank you for your business,
{LocationContactInformation}

Confirmation to Admin

Subject: Rental Payment Received for Agreement {RentalAgreementID}

Body: Dear Rental Location Admin,

The credit card payment of {PrepaymentAmount} for rental agreement {RentalAgreementID} has been received from {CompanyName}.

Confirmation to Customer

Subject: Rental Payment Confirmation for Agreement {RentalAgreementID}

Body: Dear {CompanyName},

Thank you for your credit card payment of {PrepaymentAmount} for rental agreement {RentalAgreementID}. Please feel free to call us with any questions or concerns prior to your rental start date/time.

Thank you for your business,
{LocationContactInformation}

Email Template Setup – Suggested Verbiage

Pay & Sign Verbiage

Request to Customer

Subject: Rental Payment & Signature Request for Agreement {RentalAgreementID}

Body: Dear {CompanyName},

Please click the "Pay Now" button to submit your signature, and credit card payment of {PrepaymentAmount}, for rental agreement {RentalAgreementID}.

Thank you for your business,
{LocationContactInformation}

Confirmation to Admin

Subject: Rental Payment & Signature Received for Agreement {RentalAgreementID}

Body: Dear Rental Location Admin,

The signature, and credit card payment of {PrepaymentAmount}, for rental agreement {RentalAgreementID} has been received from {CompanyName}.

Confirmation to Customer

Subject: Rental Payment & Signature Confirmation for Agreement {RentalAgreementID}

Body: Dear {CompanyName},

Thank you for submitting your signature and your credit card payment of {PrepaymentAmount} for rental agreement {RentalAgreementID}. Please feel free to call us with any questions or concerns prior to your rental start date/time.

Thank you for your business,
{LocationContactInformation}

Email Template Setup – Suggested Verbiage

Sign Only

Request to Customer

Subject: Rental Signature Request for Agreement {RentalAgreementID}

Body: Dear {CompanyName},

Please click on the blue button above that says "click to Sign" and take a moment to review our terms and conditions for rental agreement #{RentalAgreementID}, starting on {startDate}. If you agree to our terms and conditions please enter your signature user your mouse, or your finger if using a touchscreen device. Then click "Add Signature". You will receive a confirmation email once we have received your signed agreement.

Thank you for your business,
{LocationContactInformation}

Confirmation to Admin

Subject: Rental Signature Received for Agreement {RentalAgreementID}

Body: Dear Admin,

Signature received for Rental agreement {RentalAgreementID}.

Confirmation to Customer

Subject: Rental Signature Confirmation for Agreement {RentalAgreementID}

Body: Dear {CompanyName},


Thank you for submitting your signature for rental agreement {RentalAgreementID}. Please feel free to call us with any questions or concerns prior to your rental start date/time.

Thank you for your business,
{LocationContactInformation}

Email Template Setup – Online Agreement

When an email recipient receives the “Pay Online” or “Pay Online & Sign” message, the button provided takes the customer to a webpage to complete these tasks. The “Online Agreement” template is where integraRental users can edit what customers see in the space highlighted to the right. You may choose to use your same Terms and Conditions from Agreement Section 1 and/or 2, or a completely different set of verbiage. Recipients will be required to scroll through the entire Terms and Conditions section before the Cancel or Add Signature buttons are active.

Rental Agreement Terms & Conditions



Rock Solid Rental

Contact Information

1200 Rockingham Road, Davenport, IA, 52803
(563) 555-1212, tomr@integrasoft.com

LEASE AGREEMENT - TERMS AND CONDITIONS

Lessor, hereby agrees to lease to Lessee the equipment described on the face of this agreement or in attached schedules in accordance with the following agreement:

1. TITLE AND OWNERSHIP. The leased equipment shall at all times be and remain the sole and exclusive property of Lessor. Lessee shall have only the rights to use the equipment in accordance with the terms of this agreement. Lessor shall have the right to display notice of its ownership of the equipment by display of an identifying stencil, plate or other marking, and Lessee agrees that it will not remove or cover such markings without the written permission of Lessor. It is expressly intended and agreed that the equipment shall be personal property even though it may be affixed or attached to real estate. The equipment shall not be removed from the place of delivery or installation without the expressed written permission of Lessor.
2. INSPECTION. Lessee acknowledges that he has had an opportunity to personally inspect the equipment and finds it suitable for his needs and in good condition. Lessee understands its proper use. Lessee further acknowledges Lessee responsibility to inspect the equipment prior to its use and to notify Lessor of any defects.
3. REPLACEMENT OF MALFUNCTIONING EQUIPMENT. If the equipment becomes unsafe or in disrepair for any reason, Lessee agrees to discontinue its use and to notify Lessor. Lessor will repair or replace the equipment with similar equipment in good working order if available, and if the defect is the result of normal use. Lessor is not responsible for any incidental or consequential damages caused by delays or otherwise, and Lessee hereby waives any right or entitlement, thereto.
4. WARRANTIES. Lessor is not the manufacturer of the rented property nor the agent of the manufacturer, and no warranty against patent or latent defects in material workmanship or capacity is given, and Lessee expressly waives all such warranties of fitness which may be accorded by law or otherwise. There are no warranties of merchantability or fitness, either express or implied. There is no

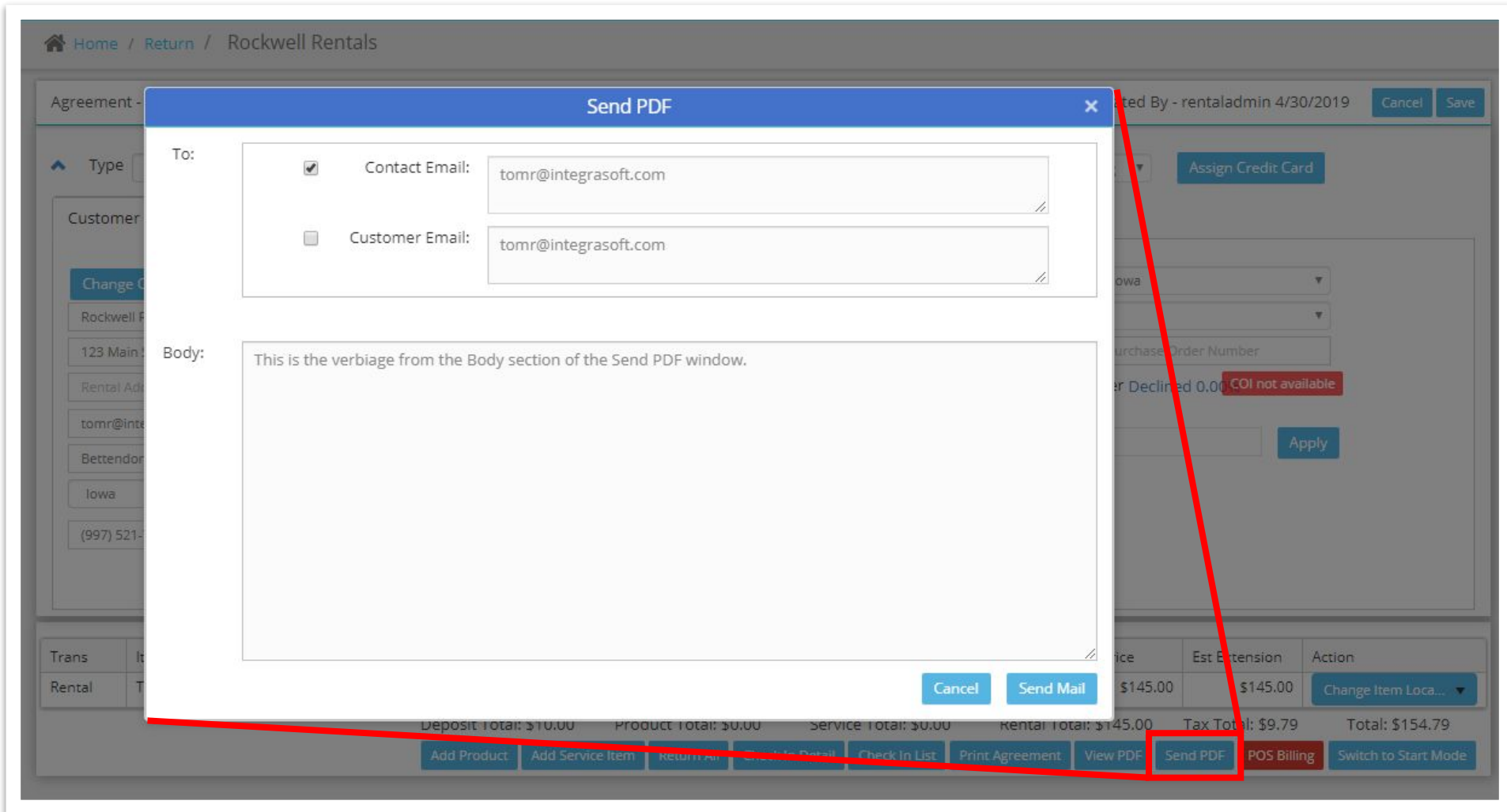
Please provide signature to agree to the terms and conditions above for this rental agreement.

Cancel

Add Signature

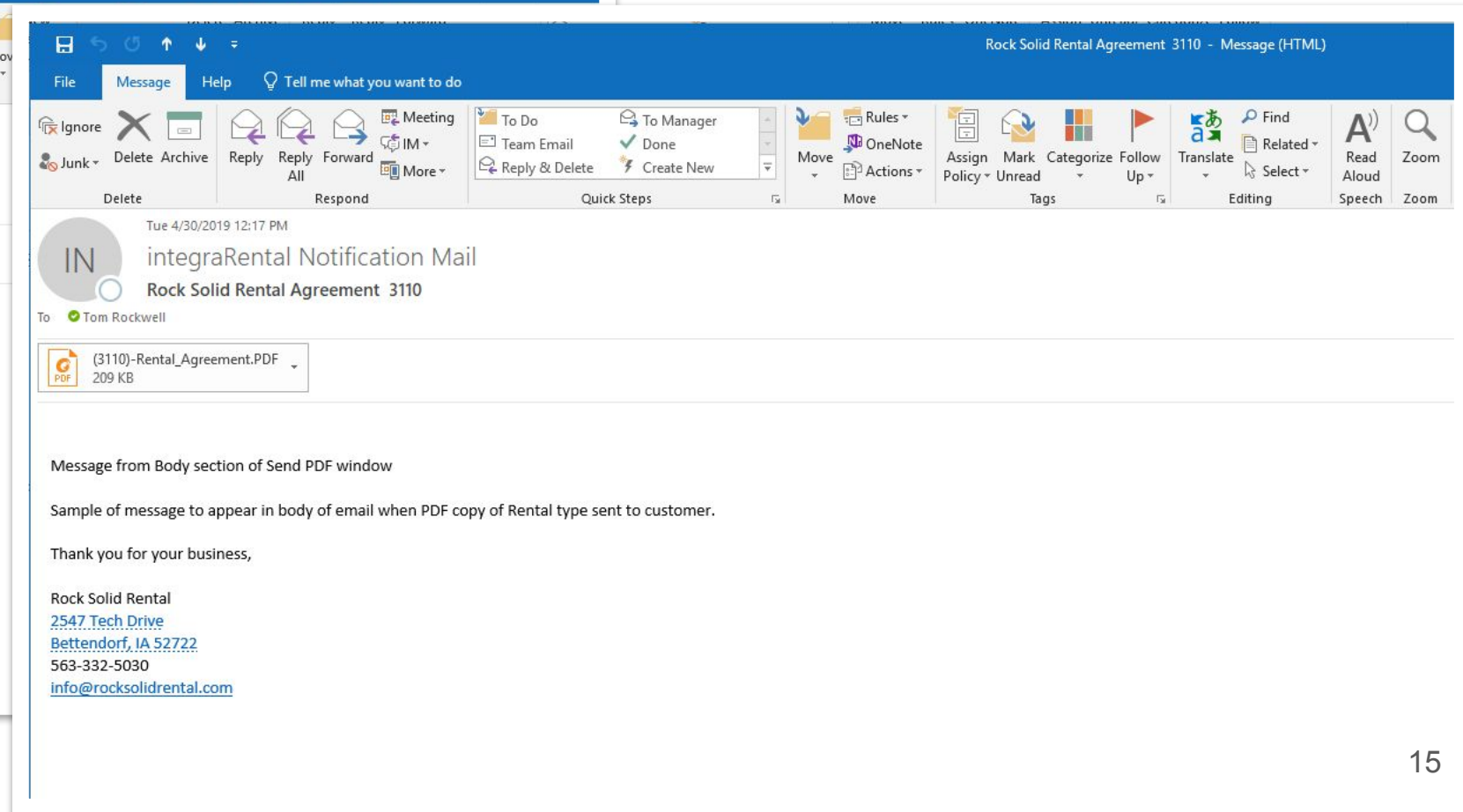
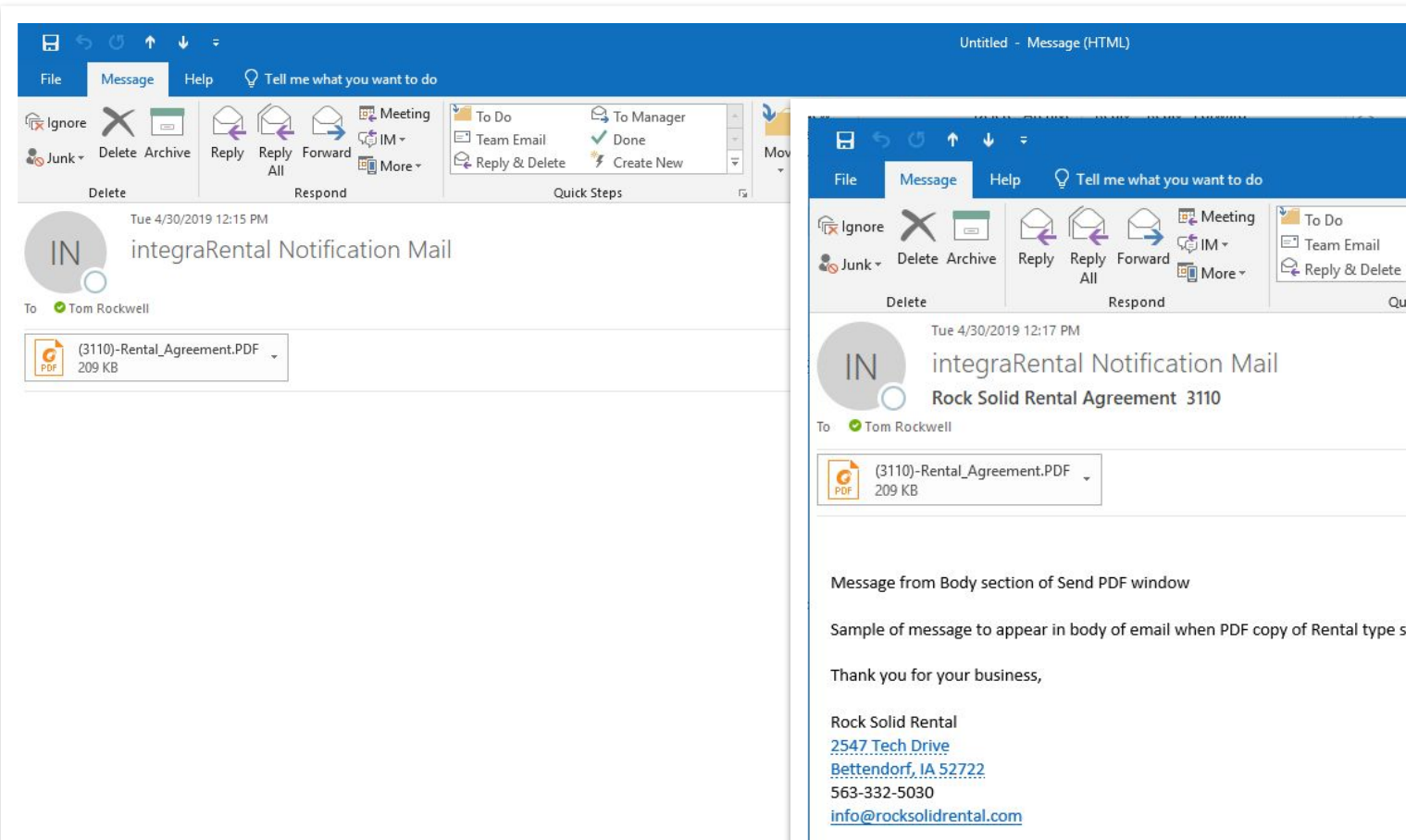
Send PDF option on Rental Agreement screen

The Send PDF option on the Rental Agreement screen allows you to send the customer a PDF copy of the rental agreement in the form of an email attachment. You can also send a default or customized subject and/or message in the body of the email. The following slides will assist you in setting this up.



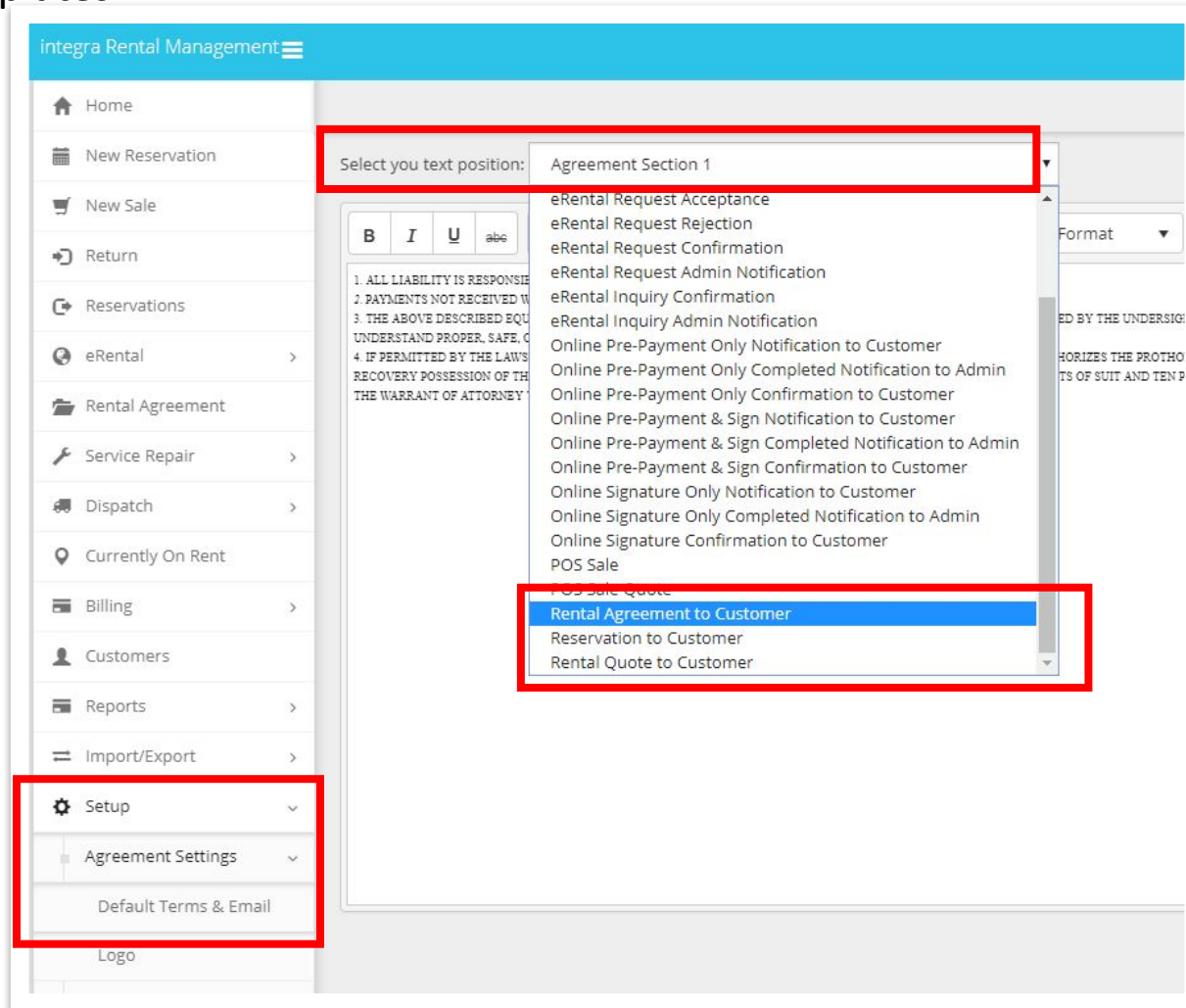
Send PDF – Email Template Setup

If you do NOT setup the email template associated with the Send PDF button on the Rental Agreement screen, the customer will receive an email with the Rental Agreement as an attachment, but with no email subject, and no email body. You have options to provide the Subject and Email Body verbiage that is the same for everyone, or that changes by automatically pulling in information such as the Rental Agreement number.



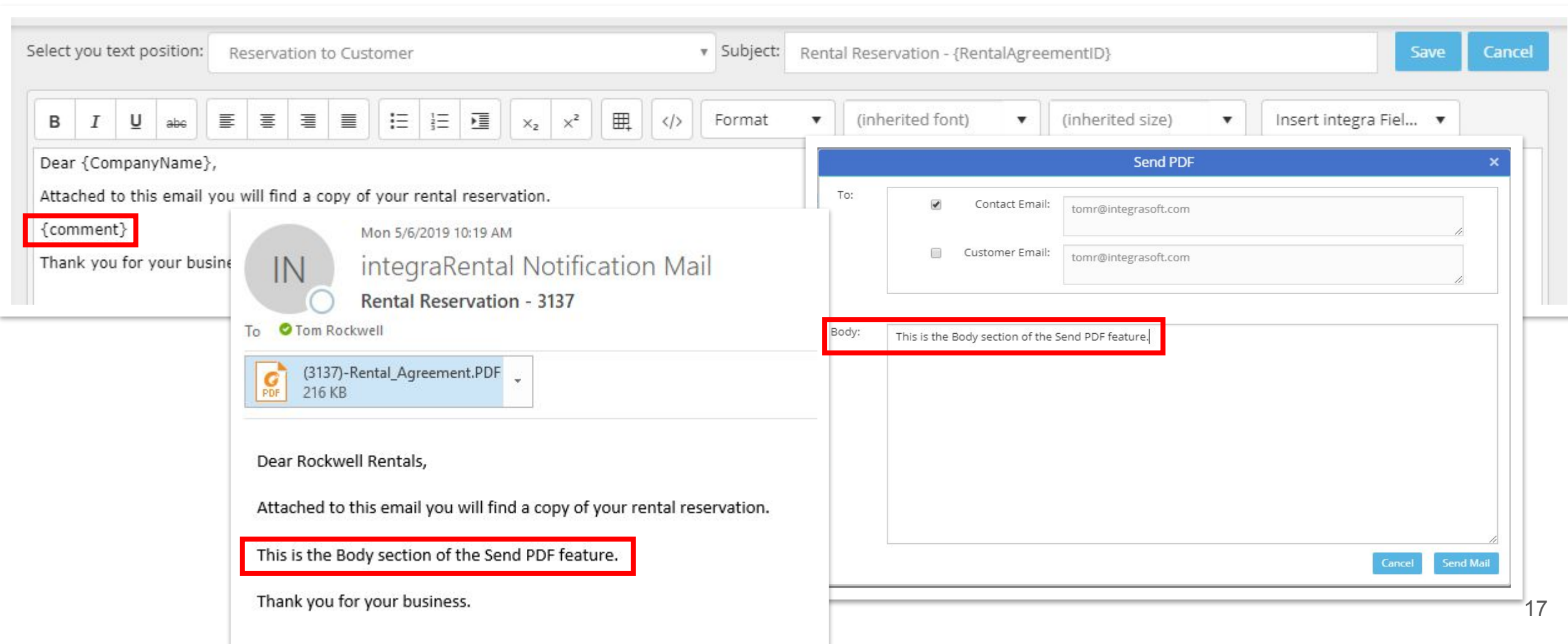
Send PDF – Setup Template by Type

There are three rental agreement types, Quote, Reservation and Rental, and you have the opportunity to setup a different email template for each one. You will find these three templates by going to Setup/Rental Agreement/Default Terms & Email from the menu. The page you are brought to will have a dropdown menu where you will find the three templates.



Send PDF – Include Body from Send PDF window

When you click Send PDF from the Rental Agreement screen you are presented with a window that allows you to choose or enter the email address(es) you want to send to, as well as a Body section to send a message for just this email. To make the verbiage entered in the Body section appear in the body of the email, you will need to add the integra Field named “comment” to your template, as pictured below.



The screenshot illustrates the process of sending a PDF with a custom body. It features three main components:

- Send PDF Window:** A modal window with a title bar "Send PDF" and a close button. It contains a "To:" field with two checked entries: "Contact Email: tomr@integrasoft.com" and "Customer Email: tomr@integrasoft.com". Below this is a "Body:" text area containing the text "This is the Body section of the Send PDF feature." and buttons for "Cancel" and "Send Mail".
- Text Editor:** A rich text editor with a toolbar (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, link icon, unlink icon, subscript, superscript, table, source code) and a "Format" dropdown. The subject line is "Rental Reservation - {RentalAgreementID}" and the text position is "Reservation to Customer".
- Email Preview:** A preview of the resulting email. The header includes the IntegraRental logo, the date "Mon 5/6/2019 10:19 AM", and the subject "integraRental Notification Mail - Rental Reservation - 3137". The recipient is "Tom Rockwell". An attachment "(3137)-Rental_Agreement.PDF" (216 KB) is shown. The body text reads: "Dear Rockwell Rentals, Attached to this email you will find a copy of your rental reservation. This is the Body section of the Send PDF feature. Thank you for your business." The phrase "This is the Body section of the Send PDF feature." is highlighted with a red box, matching the text in the Send PDF window.



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