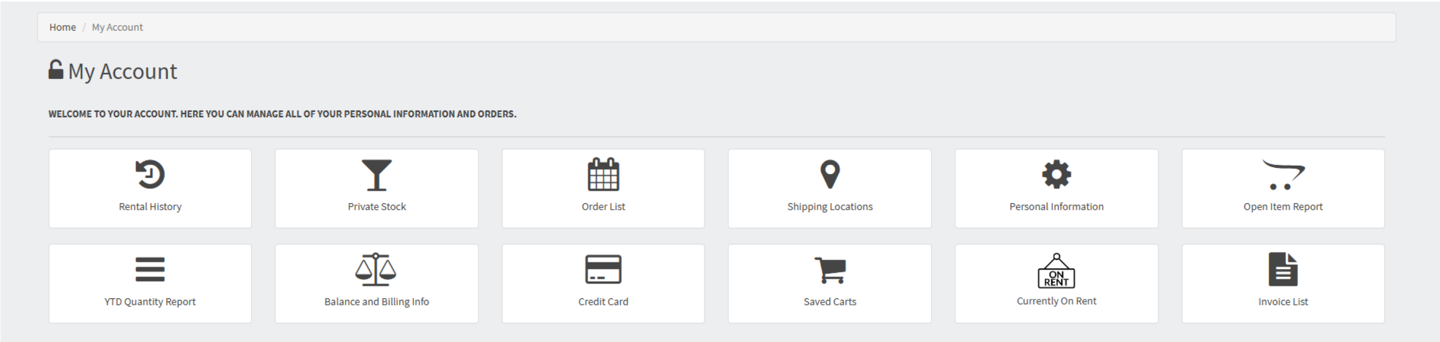
My Account - Widgets

This document explains the widgets available once a user is logged into your eRental website. Depending on your ecom site's configuration you may not see some of the widgets. If you believe to be missing a widget, or would like to remove one, please submit a support ticket.

For information on the setting up customers with logins for My Account, refer to this document: Setting Up My Account Logins

The widgets below are available for customers depending on your ecom site's configuration. My Account information can either be sourced from integraERP or integraRental. When using both ERP and Rental software, you should see all of the following widgets unless we have agreed to configure the site to hide certain widgets. *Note: when using QuickBooks instead of integraERP, users will* ***not see*** *the Private Stock, Open Item Report, YTD Quantity Report, nor the Saved Carts widgets.*



Widget Summary

Scroll down further in this PDF to view detailed information about each widget and their functions.

Rental History – Shows rental agreement history by agreement number and includes type, location, job info, start/end date, status, total, and the ability to open a pdf of the agreement. *See page 2 for more information.*

Private Stock – Shows private stock for the logged in user as you have this set up in integraERP. *See page 2 for more information.*

Order List – Shows point of sale transactions, PO # (if applicable), order date, amount, status, and the ability to view a pdf of the transaction. *See page 3 for more information.*

Shipping Locations – Shows all of the Ship to locations from integraRental, unless the user is restricted to only view the default ship to location from the eRental tab in the contact of the customer account. *See page 3 for more information.*

Personal Information – Shows current username and allows user to change their username, email, and password. This will update in integraRental when updated. *See page 4 for more information.*

Open Item Report – Shows order numbers generated from integraERP and the status, type, date, PO number, unit of measurement, and price. *See page 4 for more information.*

YTD Quantity Report – Shows a dropdown where user can select a year and displays ERP product image, if present, ERP item number, descriptions, quantity, and unit of measurement for that year. List is exportable as a .csv file. *See page 4 for more information.*

Balance and Billing Info – Shows current balance, billing address and phone number. When connected to CENPOS and , integra can flip a setting which will add a third module called Invoices, that shows invoice numbers, due dates, dates, amount due, and the ability for users to view the invoice as a pdf. *See page 5 for more information.*

> **Pay Invoices** – There is a link at the top right of the site and a button within Balance & Billing Info widget that allows customers to pay invoices via credit card online. This functionality can be turned on or off. *See page 5 for more information.*

Credit Card – Shows tokenized credit cards and offers the ability to edit expiration date or delete them. Users can also add new credit cards. *See page 6 for more information.*

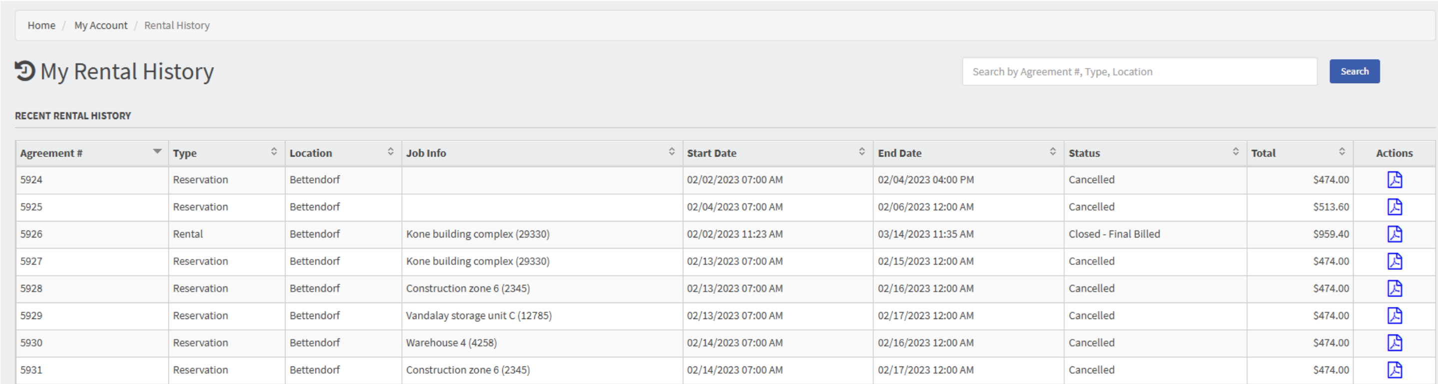
Currently on Rent – Shows asset description, item #, serial #, make/model/year, qty, rental agreement number, start/end date, job site, ship-to address, PO number, and rental status information. Provides the ability for a customer to request call off rent (sends an email to notify you of the request. *See page 7 for more information.*

Saved Carts – This widget will only show when a user is logged into a selling site. Users can save shopping carts (not rental carts) with items to reorder or pick up where they left off. *See page 7 for more information.*

Invoice List – shows all of the invoices generated and allows customers to view invoices, or email one or multiple invoices which are combined into a single pdf. *See page 8 for more information.*

Rental History Widget

This widget will show all of the rental history on an account including Agreement number, Type, Location, Start/End Date, Status, Total, and an icon a user can click to view the pdf of the agreement. Users can search by any of the fields to filter the results. Each column can be sorted alphanumerically.


Home / My Account / Rental History

My Rental History

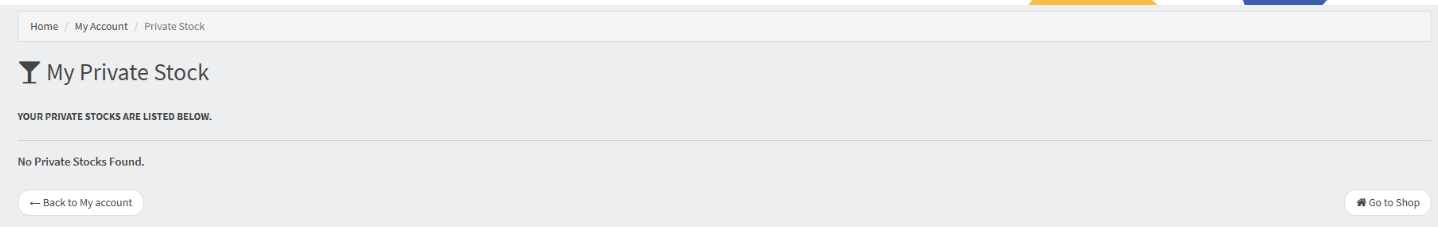
Search by Agreement #, Type, Location | Search

RECENT RENTAL HISTORY

Agreement #	Type	Location	Job Info	Start Date	End Date	Status	Total	Actions
5924	Reservation	Bettendorf		02/02/2023 07:00 AM	02/04/2023 04:00 PM	Cancelled	$474.00	
5925	Reservation	Bettendorf		02/04/2023 07:00 AM	02/06/2023 12:00 AM	Cancelled	$513.60	
5926	Rental	Bettendorf	Kone building complex (29330)	02/02/2023 11:23 AM	03/14/2023 11:35 AM	Closed - Final Billed	$959.40	
5927	Reservation	Bettendorf	Kone building complex (29330)	02/13/2023 07:00 AM	02/15/2023 12:00 AM	Cancelled	$474.00	
5928	Reservation	Bettendorf	Construction zone 6 (2345)	02/13/2023 07:00 AM	02/16/2023 12:00 AM	Cancelled	$474.00	
5929	Reservation	Bettendorf	Vandalay storage unit C (12785)	02/13/2023 07:00 AM	02/17/2023 12:00 AM	Cancelled	$474.00	
5930	Reservation	Bettendorf	Warehouse 4 (4258)	02/14/2023 07:00 AM	02/16/2023 12:00 AM	Cancelled	$474.00	
5931	Reservation	Bettendorf	Construction zone 6 (2345)	02/14/2023 07:00 AM	02/17/2023 12:00 AM	Cancelled	$474.00	

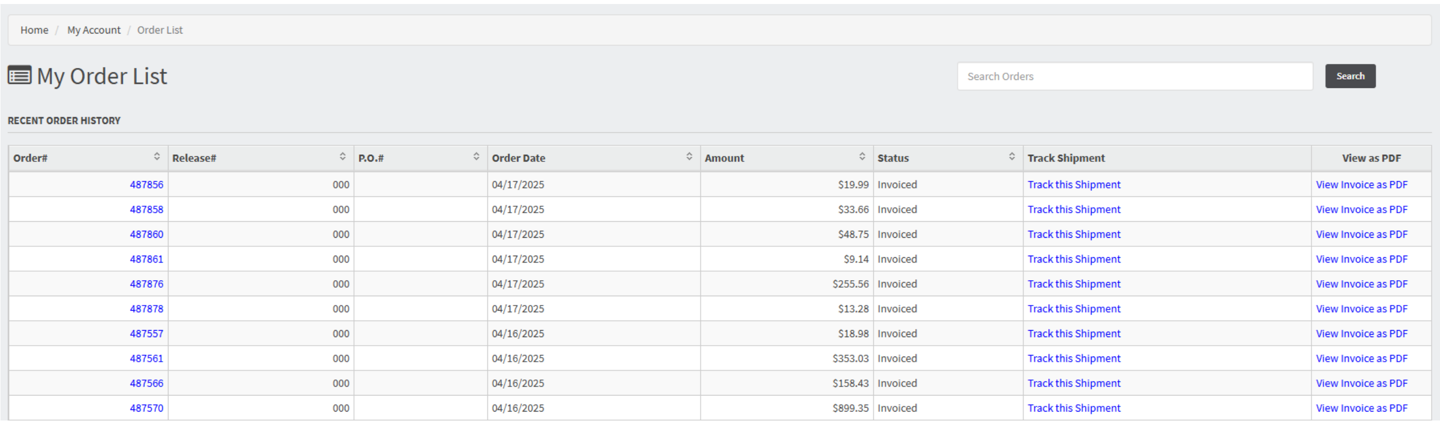
Private Stock

This widget will show items tagged as private stock in ERP. If there are no private stock items associated with the My Account login/customer, they will see this screen as below. If you would like to remove the Private Stock widget from My Account due to not using it in ERP for your customers, please submit a support ticket with the request.



Order List

This widget will show all of the point of sale orders including order number, release number, PO number, order date, amount, status, tracking (if tracking number exists in ERP otherwise link won't work), and the ability to view the invoice as a pdf. Orders may be searched to filter; columns can be sorted alphanumerically. integraSoft can hide the track shipment column if you are not putting in tracking numbers into ERP. Please submit a support ticket to remove/add this column.


Home / My Account / Order List

My Order List

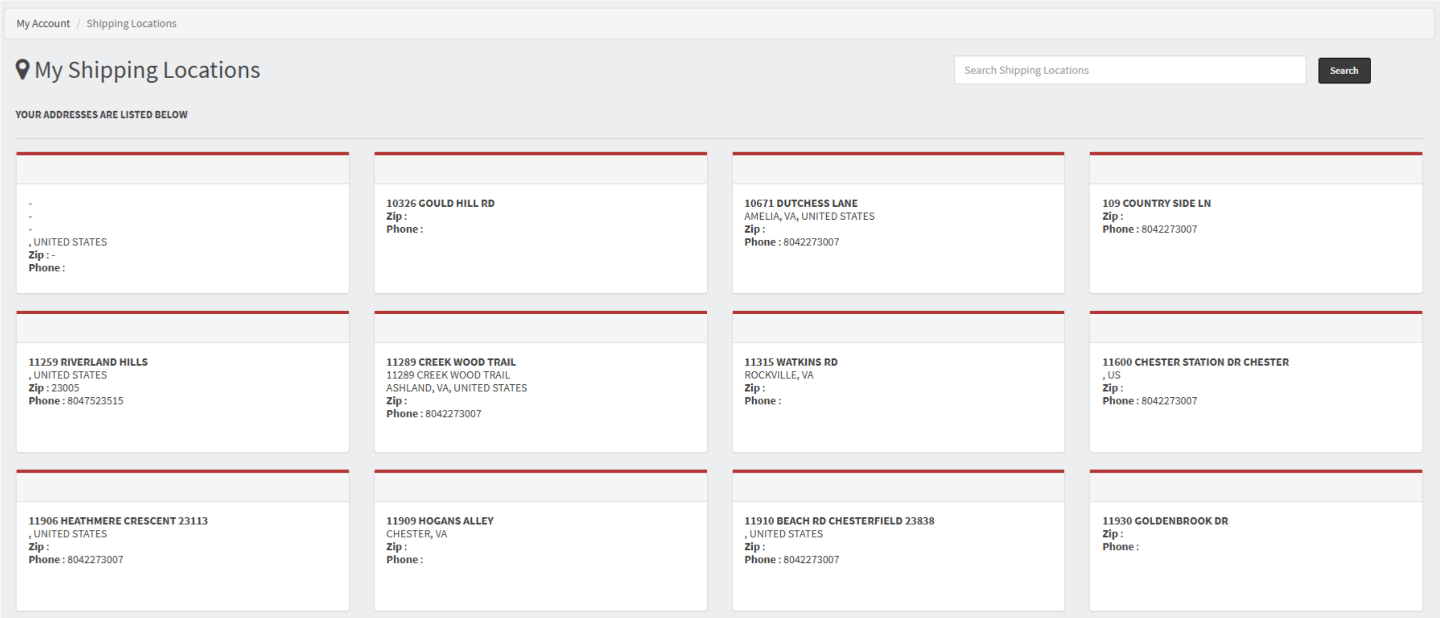
Search Orders | Search

RECENT ORDER HISTORY

Order#	Release#	P.O.#	Order Date	Amount	Status	Track Shipment	View as PDF
487856	000		04/17/2025	$19.99	Invoiced	Track this Shipment	View Invoice as PDF
487858	000		04/17/2025	$33.66	Invoiced	Track this Shipment	View Invoice as PDF
487860	000		04/17/2025	$48.75	Invoiced	Track this Shipment	View Invoice as PDF
487861	000		04/17/2025	$9.14	Invoiced	Track this Shipment	View Invoice as PDF
487876	000		04/17/2025	$255.56	Invoiced	Track this Shipment	View Invoice as PDF
487878	000		04/17/2025	$13.28	Invoiced	Track this Shipment	View Invoice as PDF
487557	000		04/16/2025	$18.98	Invoiced	Track this Shipment	View Invoice as PDF
487561	000		04/16/2025	$353.03	Invoiced	Track this Shipment	View Invoice as PDF
487566	000		04/16/2025	$158.43	Invoiced	Track this Shipment	View Invoice as PDF
487570	000		04/16/2025	$899.35	Invoiced	Track this Shipment	View Invoice as PDF

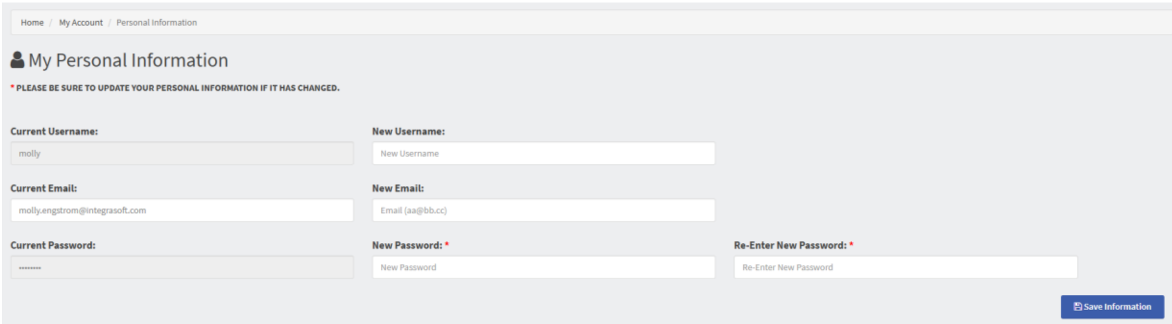
Shipping Locations

This widget will show all of the Ship To locations in integraRental and/or integraERP. Shipping locations are filterable via search function.



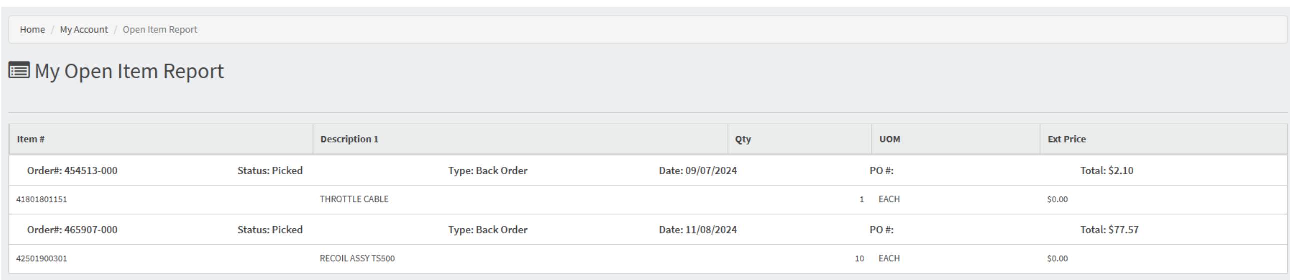
Personal Information

This widget will a user's personal information including username and email address. Users can create a new username, update their email address, or change their password on this screen by typing out the desired changes and clicking the save information button.



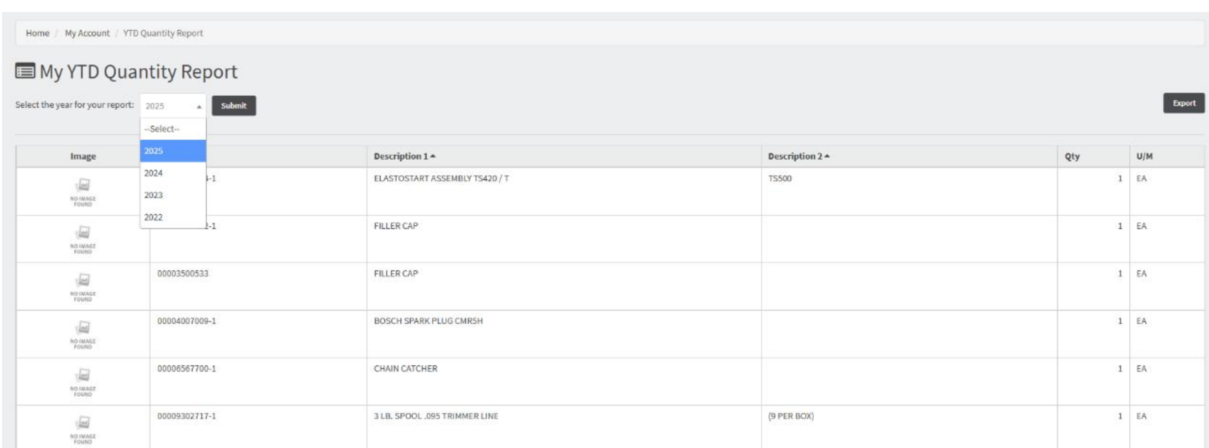
Open Item Report

This widget will show your customers open items from ERP orders and their statuses, description, quantity, unit of measurement (UOM), and price.



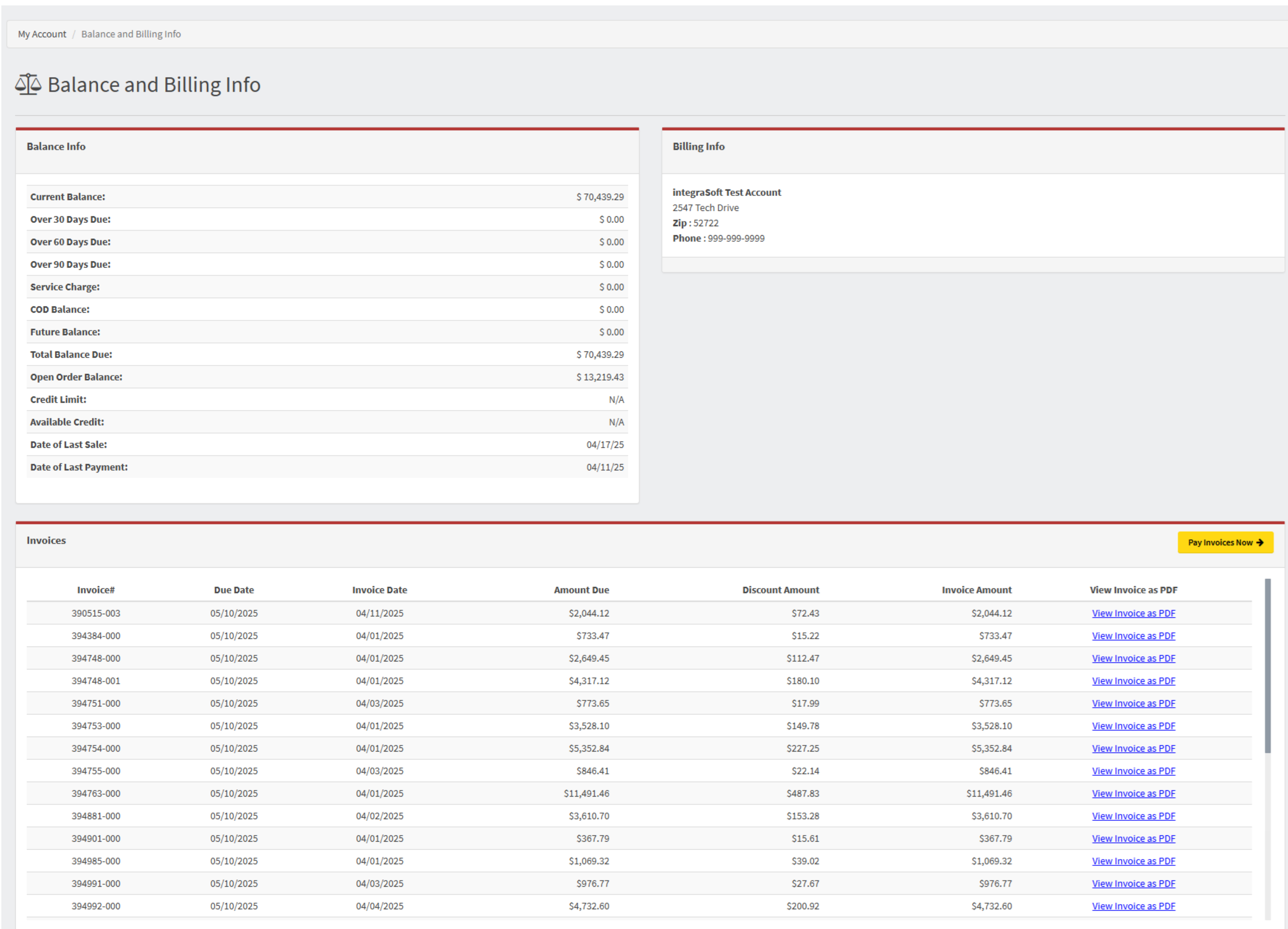
YTD Quantity Report

This widget will empower your customers to view all Point of Sale items ordered/sold by year. If there are images uploaded on the ecom site and associated with ERP products, the image will show. If you don't want the image column to show, please submit a support ticket and we can hide that column. View shows product number, descriptions, quantity, and unit of measurement. The YTD list is exportable by year.



Balance & Billing Info

When integraRental is connected to QuickBooks, this widget will show the customer's current balance and billing info. When integraRental is connected to integraERP, customers will see current balance, an aging report, service charges, total balances due, open order balances, credit limits, available credit, and dates of last sale and payment. For both QuickBooks and integraERP configurations, a list of invoices will be shown including invoice number, due date, amount due, discount amount, invoice amount, and a link to view the invoice as a pdf. There is also a button enabling users to pay invoices online.


My Account / Balance and Billing Info

Balance and Billing Info

Balance Info

Current Balance:	$ 70,439.29
Over 30 Days Due:	$ 0.00
Over 60 Days Due:	$ 0.00
Over 90 Days Due:	$ 0.00
Service Charge:	$ 0.00
COD Balance:	$ 0.00
Future Balance:	$ 0.00
Total Balance Due:	$ 70,439.29
Open Order Balance:	$ 13,219.43
Credit Limit:	N/A
Available Credit:	N/A
Date of Last Sale:	04/17/25
Date of Last Payment:	04/11/25

Billing Info

integraSoft Test Account
2547 Tech Drive
Zip : 52722
Phone : 999-999-9999

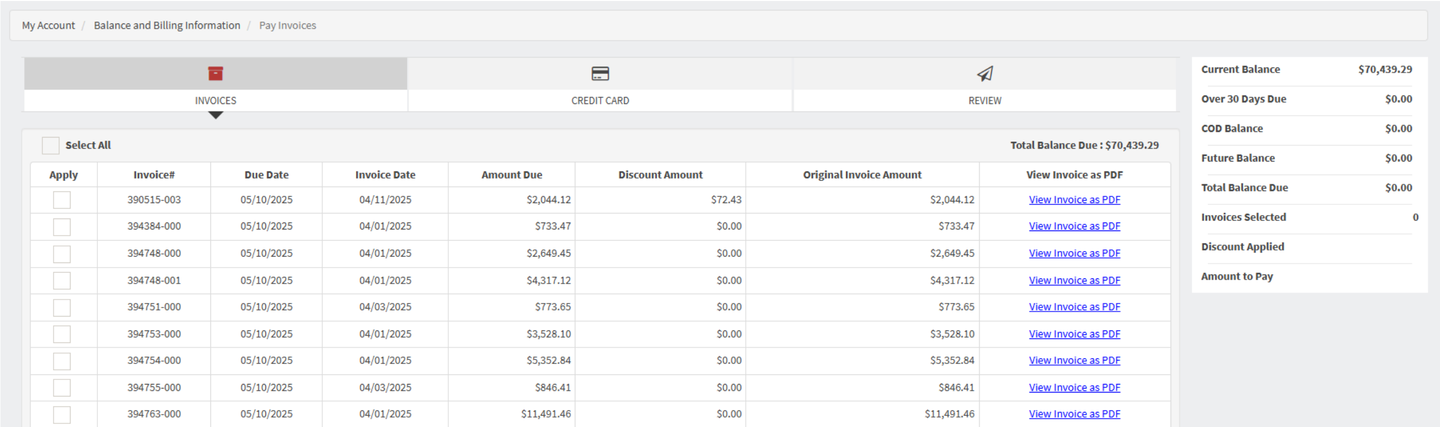
Invoices

Pay Invoices Now

Invoice#	Due Date	Invoice Date	Amount Due	Discount Amount	Invoice Amount	View Invoice as PDF
390515-003	05/10/2025	04/11/2025	$2,044.12	$72.43	$2,044.12	View Invoice as PDF
394384-000	05/10/2025	04/01/2025	$733.47	$15.22	$733.47	View Invoice as PDF
394748-000	05/10/2025	04/01/2025	$2,649.45	$112.47	$2,649.45	View Invoice as PDF
394748-001	05/10/2025	04/01/2025	$4,317.12	$180.10	$4,317.12	View Invoice as PDF
394751-000	05/10/2025	04/03/2025	$773.65	$17.99	$773.65	View Invoice as PDF
394753-000	05/10/2025	04/01/2025	$3,528.10	$149.78	$3,528.10	View Invoice as PDF
394754-000	05/10/2025	04/01/2025	$5,352.84	$227.25	$5,352.84	View Invoice as PDF
394755-000	05/10/2025	04/03/2025	$846.41	$22.14	$846.41	View Invoice as PDF
394763-000	05/10/2025	04/01/2025	$11,491.46	$487.83	$11,491.46	View Invoice as PDF
394881-000	05/10/2025	04/02/2025	$3,610.70	$153.28	$3,610.70	View Invoice as PDF
394901-000	05/10/2025	04/01/2025	$367.79	$15.61	$367.79	View Invoice as PDF
394985-000	05/10/2025	04/01/2025	$1,069.32	$39.02	$1,069.32	View Invoice as PDF
394991-000	05/10/2025	04/03/2025	$976.77	$27.67	$976.77	View Invoice as PDF
394992-000	05/10/2025	04/04/2025	$4,732.60	$200.92	$4,732.60	View Invoice as PDF

Pay Invoices Now

When a My Account user clicks the Pay Invoices Now button inside the Balance & Billing Info Widget or when clicking the Pay Invoices Now link in the top right of the website when logged in, they will see this page. Users can view and select one or more invoices to proceed through checkout and pay the invoice with a credit card online.

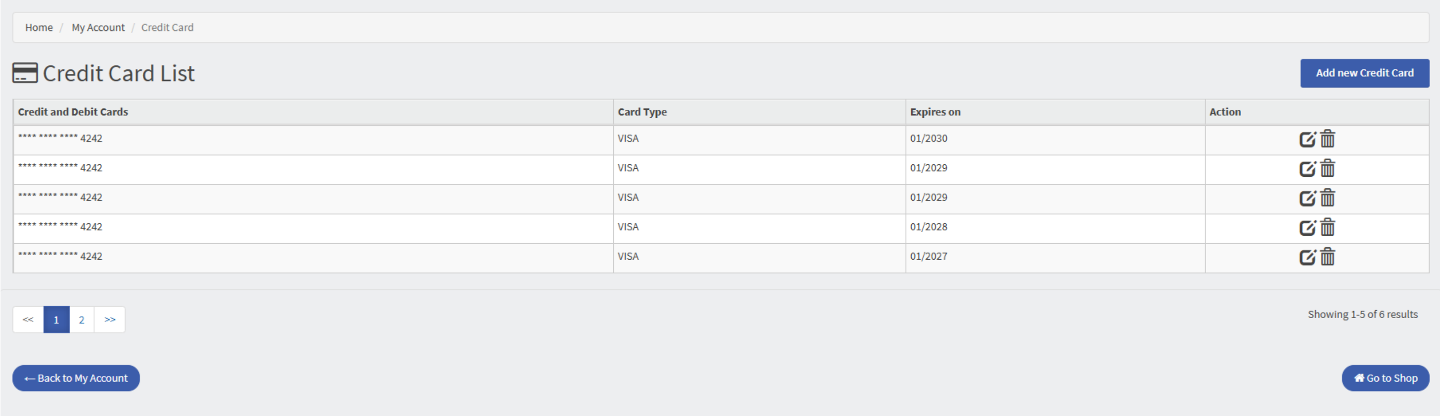


Apply	Invoice#	Due Date	Invoice Date	Amount Due	Discount Amount	Original Invoice Amount	View Invoice as PDF
	390515-003	05/10/2025	04/11/2025	$2,044.12	$72.43	$2,044.12	View Invoice as PDF
	394384-000	05/10/2025	04/01/2025	$733.47	$0.00	$733.47	View Invoice as PDF
	394748-000	05/10/2025	04/01/2025	$2,649.45	$0.00	$2,649.45	View Invoice as PDF
	394748-001	05/10/2025	04/01/2025	$4,317.12	$0.00	$4,317.12	View Invoice as PDF
	394751-000	05/10/2025	04/03/2025	$773.65	$0.00	$773.65	View Invoice as PDF
	394753-000	05/10/2025	04/01/2025	$3,528.10	$0.00	$3,528.10	View Invoice as PDF
	394754-000	05/10/2025	04/01/2025	$5,352.84	$0.00	$5,352.84	View Invoice as PDF
	394755-000	05/10/2025	04/03/2025	$846.41	$0.00	$846.41	View Invoice as PDF
	394763-000	05/10/2025	04/01/2025	$11,491.46	$0.00	$11,491.46	View Invoice as PDF

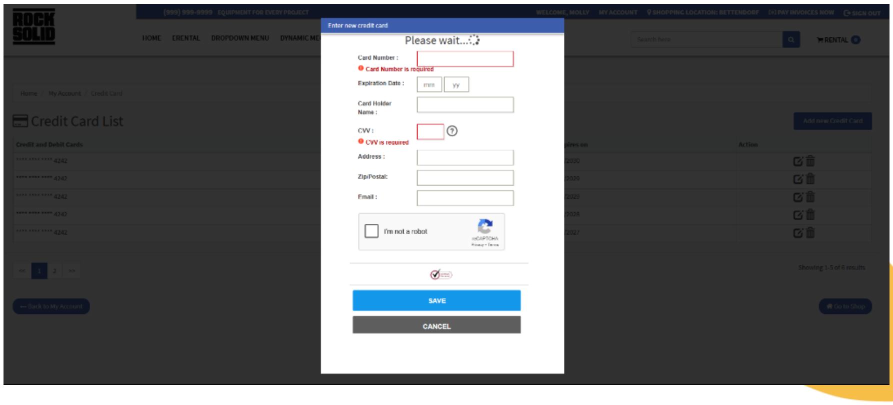
Current Balance	$70,439.29
Over 30 Days Due	$0.00
COD Balance	$0.00
Future Balance	$0.00
Total Balance Due	$0.00
Invoices Selected	0
Discount Applied	
Amount to Pay	

Credit Card

Users can view the credit/debit cards that are saved to their account in integraRental and/or integraERP. They can update card expiration dates, delete cards and add new cards. You must be set up with CENPOS or another credit card system to use this feature.

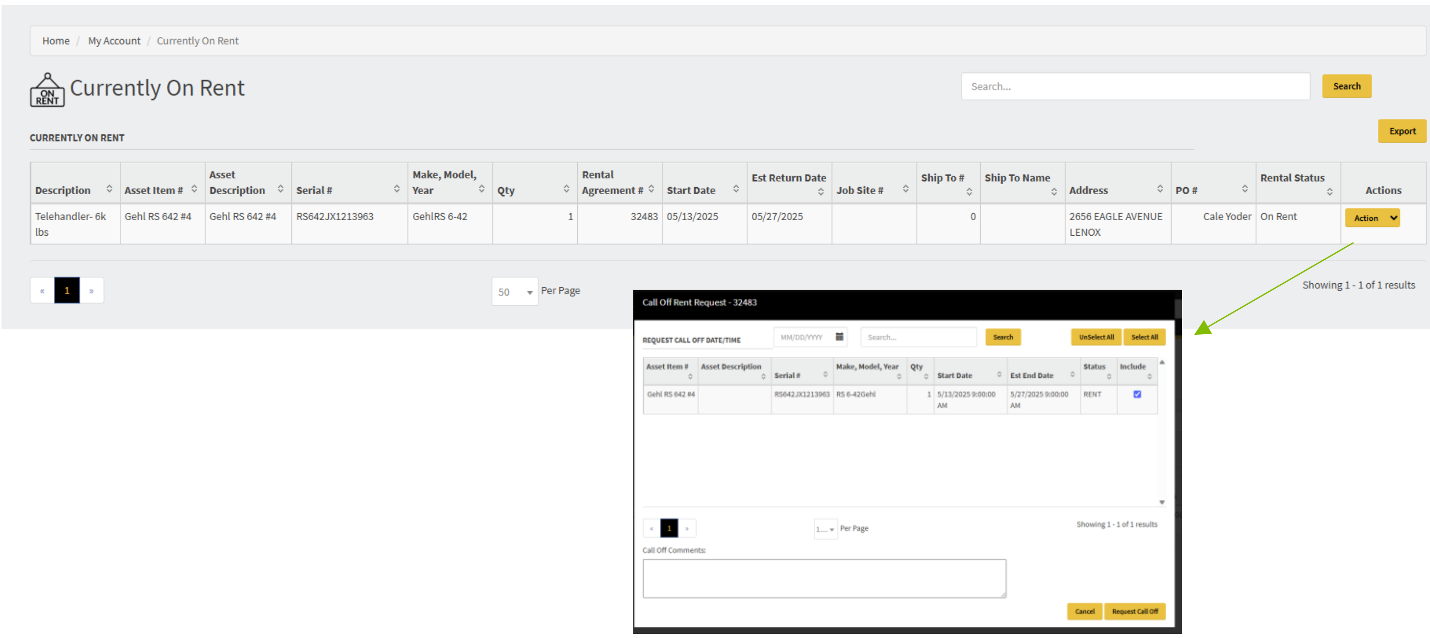


Credit and Debit Cards	Card Type	Expires on	Action
**** **** **** 4242	VISA	01/2030	
**** **** **** 4242	VISA	01/2029	
**** **** **** 4242	VISA	01/2029	
**** **** **** 4242	VISA	01/2028	
**** **** **** 4242	VISA	01/2027	



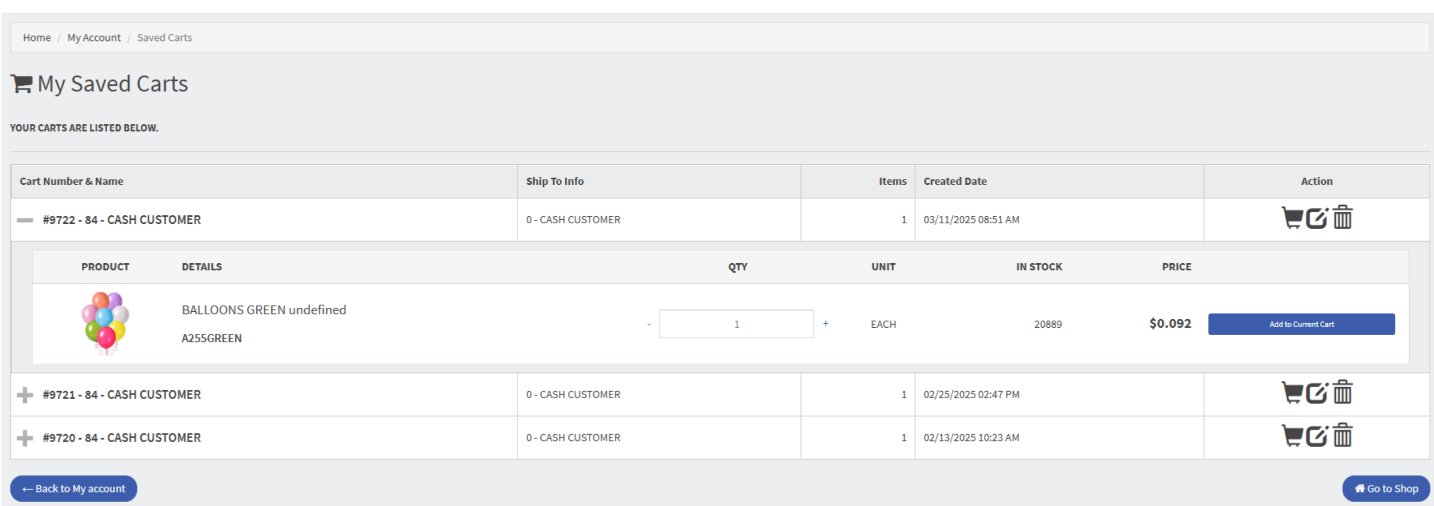
Currently On Rent

When your ecom site is connected to integraRental, the Currently on Rent widget will show a high level view of all assets currently rented by the customer including description, asset item number/description, serial number, make/model/year, quantity, rental agreement number, start date, estimated return date, job site number/address (if applicable), the ship to number and address as well as the PO number and rental status. The actions dropdown on a rental's row will allow a customer to request a call off. This popup will allow your customer to fill out some information and it will be emailed to you. It will not automatically call an asset off rent.



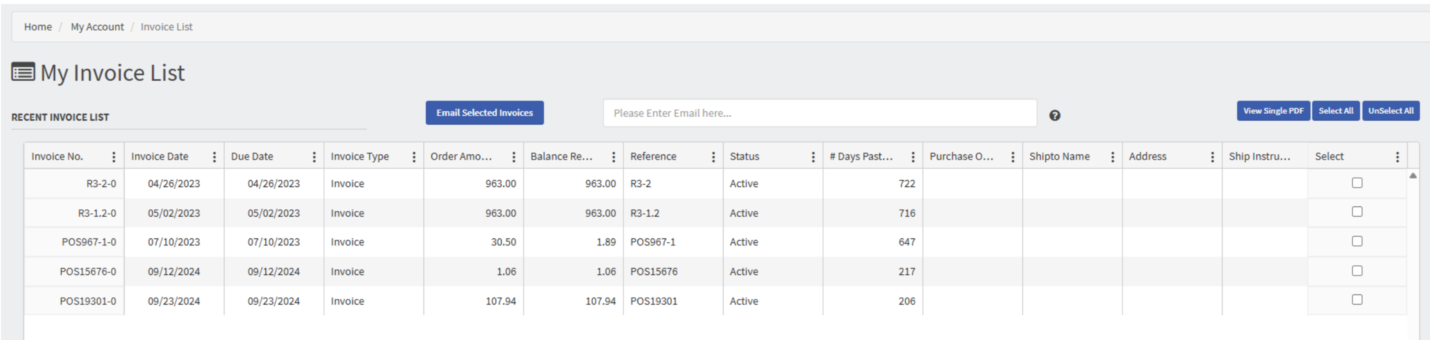
Saved Carts

When your ECOM site is connected to integraERP, users can view carts they have saved for future purchases in this widget. They can click the plus icon to open the cart to view what products have been saved to the cart, quantity, units of measurement, how many are currently in stock, the price, and can add to current cart or load the saved cart and continue shopping. Users can also edit or delete carts.



Invoice List

Users can view invoices at a glance from the Invoice List widget. Here they can view invoices individually as PDFs or view multiple invoices as a single pdf. Users can email one or multiple invoices on a single pdf to any email address.


Home / My Account / Invoice List

My Invoice List

RECENT INVOICE LIST

Email Selected Invoices

Please Enter Email here...

View Single PDF | Select All | UnSelect All

Invoice No.	Invoice Date	Due Date	Invoice Type	Order Amo...	Balance Re...	Reference	Status	# Days Past...	Purchase O...	Shipto Name	Address	Ship Instru...	Select
R3-2-0	04/26/2023	04/26/2023	Invoice	963.00	963.00	R3-2	Active	722					
R3-1.2-0	05/02/2023	05/02/2023	Invoice	963.00	963.00	R3-1.2	Active	716					
POS967-1-0	07/10/2023	07/10/2023	Invoice	30.50	1.89	POS967-1	Active	647					
POS15676-0	09/12/2024	09/12/2024	Invoice	1.06	1.06	POS15676	Active	217					
POS19301-0	09/23/2024	09/23/2024	Invoice	107.94	107.94	POS19301	Active	206					