

New Customer Generator Rental Information

Date/Time: _____

Name: _____ **Title:** _____

Address: _____

Phone: _____ **Email:** _____

Days Needed: _____ **What are you powering:** _____

Business or Residential: _____ **Delivery or Pick-Up:** _____

How many Amps: _____ (Amps: 100/200/300) How many volts: _____ (Volts: 120/240/480)

What Phase: _____ (Phase:1/2/3) **How far away is the generator from the power ie: extension
cords, box? _____

Do you need power Cables?

3 phase power cables ?

Spider box Cables ?

DO you need power distribution boxes?

Do you need fuel and delivery ?

Will you run equipment for 8 , 16 or 24 HoursPer day?

Description:

RENTAL EQUIPMENT PROTOCOL

Quote#: _____

Customer: _____

Date of Rental: _____

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- Create Quote in POR
 - Send Quote as PDF
 - Request E- Sign in POR/ Get Photo Of Driver license
 - Send Invoice (prepayment required unless Established Customer)
 - Once payment is made input payment amount in por and quickbooks
 - Once signed change quote status in por to Reserved
 - Create Pick list and assign for delivery
 - Send out equipment (change status to order in Por)
 - Deliver equipment at delivery time
 - at end of rental period create a new quote/contract in por or arrange to pick up
 - Once equipment is received or picked up change por status to received
 - Close POR if paid in full
 - Equipment check in checklist
 - Put Ready tag on equipment to show status (needs repair or ready for send out)
 - Assign to an account mgr
 - An auto email or text gets sent to the customer (call this number for support)

Accounting Process

Hiring and Training .