

<b>Allied Rental Company</b>					
Rental Work Breakdown Structure					
<b>0</b>	<b>Initiation</b>				
	<b>0.1</b>	<b>New Customer Generator Rental Information</b>			
		<b>0.1.1</b>	<b>Create rental quote and record intake form</b>		
			0.1.2.0	Date/Time	
			0.1.2.1	Customer Name/Company Name	
			0.1.2.2	Onsite Address	
			0.1.2.3	Contact Number	
			0.1.2.4	Email	
			0.1.2.5	Rental Duration	
			0.1.2.6	Delivery or Pick-Up	
			0.1.2.7	What are you powering	
			0.1.2.8	Business or Residential	
			0.1.2.9	How many Amps (Amps: 100/200/300)	
			0.1.3.0	How many volts:(Volts: 120/240/480)	
			0.1.3.1	What Phase: (Phase:1/2/3)	
			0.1.3.2	How far away is the generator from the power ie: extension cords, box?	
			0.1.3.3	Will you need spider box cables, how many / length in feet:	
			0.1.3.4	Will you need a 3 phase power Distribution Panel	
			0.1.3.5	Will you need fuel to be delivered, how often	
			0.1.3.6	How many hours per day will equipment be ran, 8, 16 or 24?	
			0.1.3.7	Other details / job description	
		<b>0.2</b>	<b>Rental Equipment Protocol Checklist</b>		
			<b>0.2.1</b>	<b>Equip Send Out Protocol</b>	
				0.2.3.1	Create / Send Quote in POR for payment and signature unless customer is on account
				0.2.3.2	Send customer account application in Docusign
				0.2.3.3	Send Completed Customer application to Credit check vendor
				0.2.3.4	Create Customer file ( hubspot and POR )
				0.2.3.5	Get Copy of Driver license on file.
				0.2.3.6	Get there insurance coverage for rental IF they ask to wave the damage waiver (15% insurance fee)
				0.2.3.7	Add a deal into HubSpot.
				0.2.3.8	Once payment is made input payment amount in POR and QuickBooks / Stripe
				0.2.3.9	Once signed / paid change quote status in POR to Reserved
				0.3.2.1	Identify which machine will support the power requirement, that voltage is set properly on machine ( do not change voltage while machine is running )
				0.3.2.2	Upload PickList in Allied Rental Chat to be placed for check in/out folder
				0.3.2.3	Assign and Confirm Delivery driver.
				0.3.2.4	Delivery tech to complete PickList check out process before equipment leaves the shop
				0.3.2.5	Deliver equipment at specified delivery time and date
				0.3.2.6	Once equipment is received / picked up complete check in on PickList change POR status to received
				0.3.2.7	After contract is signed need to collect payment or deposit
				0.3.2.8	Prior to the contract being signed, review the contract with the customer to ensure that all charges they are agreeing to are correct.(Line items)
				0.3.2.9	Confirm someone will be connecting equipment. (Electrician)
				0.4.2.0	After delivery of equipment, check with customers to see if needs were met.
		<b>0.3</b>	<b>Closing out Rental in POR</b>		
			<b>0.3.1</b>	<b>check in / Check out</b>	

			0.3.2.1	Send invoice to customer if on account / if paid in full close out in POR			
			0.3.2.2	Send any additional receipts to Jess with SN# of applicable machine			
			0.3.2.3	Put ready tag on equipment to show status either needs repair or ready to be rented			
			0.3.2.4	Update equipment inventory status in POR if item needs repair or is ready to rent			
			0.3.2.5	Update rental Spiff for each Generator rented - (pay out and the part to add to the the weekly pay out)			
			0.3.2.6	Confirm machine is ready via Linx Up (Preferably copeland location secondary Eastman location)			
			0.3.2.7	If prolonged rental do periodic check-ins with customers to assure the customer is satisfied with rental equipment.			
			0.3.2.8	Verify a need for future rentals if there is, set up future rentals to ensure we can exceed their expectations especially if they have events planned throughout the year.			
			0.3.2.9	If contract is extended, notify Allied Rental personel of change to contract.			
			0.3.3.1	Once rental is expired and no longer needed, the salesperson confirms rental is complete and schedules pick up.			
			0.3.3.2	Confirm equipment is returned and checked back into inventory.			
			0.3.3.3	Close out sale and collect all payments in Point of Rental.			