

# User Guide – Managing Insurance

The PlantHire Admin User sets Insurance Types via Reference Data.

## Flags

To automatically display flags where a company and/or equipment insurance item is either:

- approaching expiry, or
- expired

Enter in the number of *Days Before Expiry* under **Expiry Reminders** in System Settings; this will serve two purposes:

- 1. if you have **Expiry Reminders** checked (i.e. switched on) for *Send for Insurance* you'll be sent an advisory email the number of days before expiry and the alert will be displayed on the home screen, and
- 2. the company and/or equipment insurance item will have an alert icon displayed beside its name when conducting an equipment search (see **Alerts** below).

## **Managing Insurance**

Insurance details plus certificates of currency attachments can be added to a company and/or a piece of equipment on the Company's behalf:

#### For Company Insurance

- 1. Go to Assets
- 2. Select Companies
- 3. Select the company name
- 4. Click on Manage Insurance
- 5. Click Add (or click on an existing Insurance type to edit the details)
- 6. View/Attach a file via the Show Documents button
- 7. Click Update

#### For Equipment Insurance

- 1. Go to Assets
- 2. Select Equipment
- 3. Select the Equipment item name
- 4. Click on Manage Insurance
- 5. Click Add (or click on an existing Insurance type to edit the details)
- 6. View/Attach a file via the Show Documents button
- 7. Click Update

#### Alerts

Company and Equipment insurance items recorded in PlantHire will display a red and yellow warning icon beside their respective names in the Equipment search table when creating a Job Line Item. If the

1 | Page

Plant Hire is proudly supported by simplylogical.net as part of the vfmtest.com suite. Copyright © 2018, Sharrowlane Pty Ltd t/a simplylogical.net - All rights reserved.



insurance item is coming up for expiry or it has expired; a yellow exclamation mark and/or a red circle will be displayed, respectively.

| Se<br>? | earch<br>Equipmo | ent Sort by: VF        | M v                             |               |        |                 |                 |         |          |            |
|---------|------------------|------------------------|---------------------------------|---------------|--------|-----------------|-----------------|---------|----------|------------|
|         |                  | Company                | Equipment                       | Capacity      | Rating | Hourly<br>(Wet) | Hourly<br>(Dry) | Weekly  | Floatage | Additional |
|         | <u>Select</u>    | ा Bundie<br>Buliders ♀ | BigExcavator                    |               | 2      | 100.00          | 50.00           | 800.00  | 200.00   | 0.00       |
|         | <u>Select</u>    | □ Bundie<br>Buliders ╺ | <ul> <li>big buckets</li> </ul> |               | 5      | 300.00          | 100.00          | 0.00    | 0.00     | 0.00       |
|         | <u>Select</u>    | angetest170815b        | C2Ange15b                       | 6 Tonnes      | 0      | 500.00          | 350.00          | 1000.00 | 200.00   | 150.00     |
|         | <u>Select</u>    | angetest170815a        | C2Ange15                        | 2.8<br>Tonnes | 0      | 250.00          | 200.00          | 800.00  | 150.00   | 0.00       |

Figure 1 Expiry icons in Equipment search table

### Synchronising Insurance from 360Pro

For *360Pro-Adcom* account holders, the Insurance Types specified in your PlantHire account's Reference Data will automatically be listed in 360Pro. Job Managers in 360Pro can select which insurance items they want Providers to choose from by selecting the insurance type on the PlantHire tab (see image below) before publishing their Plant and Equipment Hire tender (job).

|   | Job Info Provider Info My first section Plant Hire |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|
|   | Choose equipment                                   |  |  |  |  |  |  |
| *   | Equipments Rates Insurances                        |  |  |  |  |  |  |
| Plant &<br>Equipment Hire                                       | Insurances   |  |  |  |  |  |  |
| Demo 170706   | Public Indemnity                                   |  |  |  |  |  |  |
| Review and Publish  | Professional Liability                             |  |  |  |  |  |  |
| <ul> <li>Jobs</li> </ul>  | Motor Vehicle                                      |  |  |  |  |  |  |
| Providers   | Workers Comp                                       |  |  |  |  |  |  |
| <ul> <li>Panels</li> <li>Evaluation</li> <li>Reports</li> </ul> | Update   |  |  |  |  |  |  |
| System  |  |  |  |  |  |  |  |
| <ul> <li>Users</li> <li>Help</li> </ul>                         |  |  |  |  |  |  |  |
| Logged in as<br>mc2admin1<br>mc2admin1<br>Role: Boss<br>Logout  |  |  |  |  |  |  |  |

Figure 2 Job Manager's perspective in 360Pro: Selecting Insurance items in 360Pro (Providers will be able to enter insurance details for the items selected)



Providers can supply their Company and Equipment Insurance details via 360Pro when responding to a Plant and Equipment Hire job.

| Insurance Details         |  |
|---------------------------|--|
| Insurance Type:           | Professional Liability 🗸   |
| Insurance Provider:       | Public Indemnity   |
| Policy Number:            | Motor Vehicle  |
| Start Date:               | Workers Comp   |
| End Date:                 |  |
| Insurance Amount:         |  |
| Comments:                 |  |
| Note: Document(s) uploads | will be available after you have successfully saved the details above. |
|                           |  |
|                           |  |

Figure 3 Provider Perspective: Provider add their details and Clicks 'Save' in order to attach a file(s)

The Insurance details and attachments submitted by the Provider will be transferred to PlantHire at the time of Synchronisation. Any insurance item included in the Synchronisation step will be available to edit by PlantHire Administrative and/or Manager Users following the steps on page 1 of this Guide.

## Reporting

The Insurance Report in PlantHire will export a copy of Company and Equipment Insurance details into Excel.