

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

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

Search									
? Equipment Sort by: VFM									
	Company	Equipment	Capacity	Rating	Hourly (Wet)	Hourly (Dry)	Weekly	Floatage	Additional
Select	Bundie Buliders	BigExcavator		2	100.00	50.00	800.00	200.00	0.00
Select	Bundie Buliders	big buckets		5	300.00	100.00	0.00	0.00	0.00
Select	angetest170815b	C2Ange15b	6 Tonnes	0	500.00	350.00	1000.00	200.00	150.00
Select	angetest170815a	C2Ange15	2.8 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).

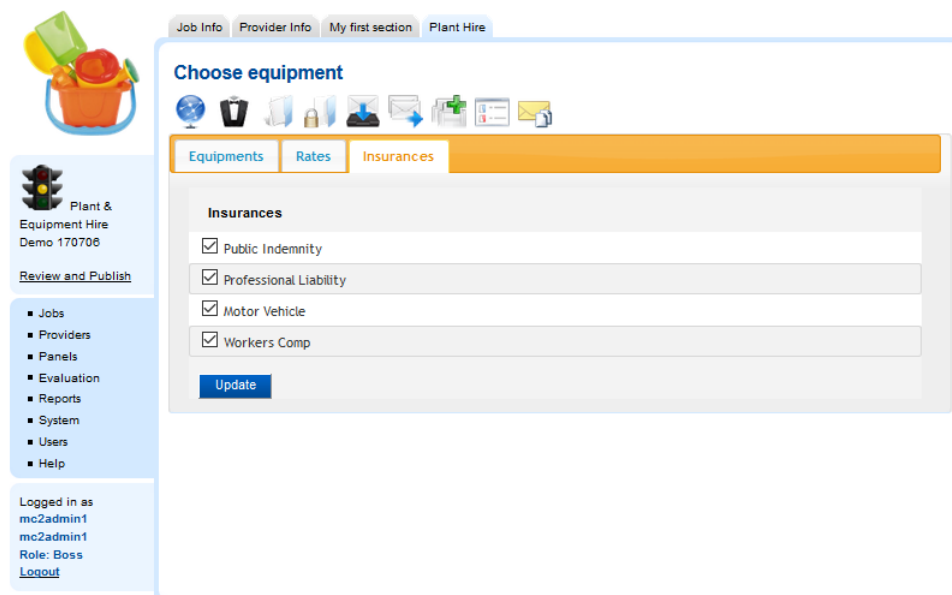


Figure 2 Job Manager's perspective in 360Pro: Selecting Insurance items in 360Pro (Providers will be able to enter insurance details for the items selected)

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

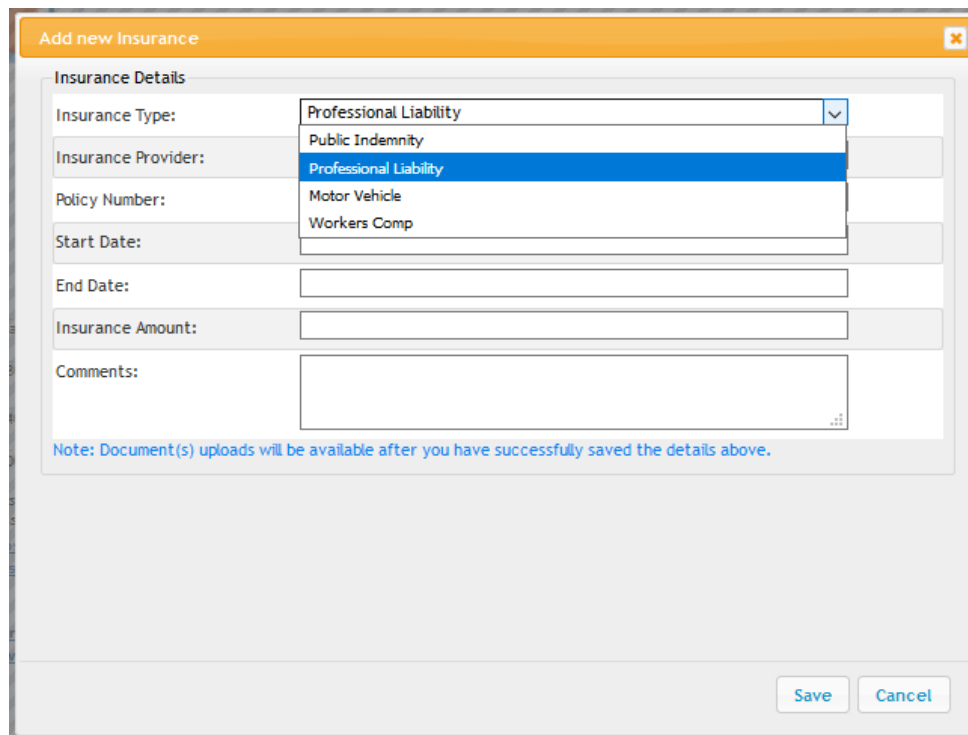


Figure 3 Provider Perspective: Provider add their details and Clicks 'Save' in order to attach a file(s)

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.