EFI Account Online Access —

Using today's technology to manage your equipment needs with speed and efficiency.

Online access is quick, easy and versatile to use. It provides account customers with real time access to:

- *Calling equipment off rent*
- *Calculating overall job costs*
- *Managing equipment on rent*
- *Viewing/Printing reports*
- *Viewing/Printing invoices*

To find out more about Online Access:

- Visit **efitn.com, 'My Account' page**
- E-mail **admincp@equipmentfindersinc.com**
- Call **615-780-2060** to talk with our Administrator

'The Brands You Know,

The Service You Have Come to Trust'

Requesting Access

To request access please send the following info:

- **Full Name**
- **Company Name**
- **Email**
- **Address**
- **Phone number**
- **Job Title**

to admincp@equipmentfindersinc.com.

- All information will be verified, then you will receive an 'Authorization Code' and 'Verification Code' .

- These codes allow you to create your unique user profile.

- A request should be sent for each separate user who would like access

- Response time is 24-48 hours

- Follow instructions on page 4 to set-up user profile.

Reports Available

Report Title	Report Description	Drill Down Options
Open Rental Summary	Displays all open contracts and the equipment on each contract. Filters available: job #.	Allows drill down to actual invoice for viewing and printing.
Equipment on Rent	Shows equipment on rent to customer, listed by newest contract number at the top. **Allows you to 'Call' equipment off rent.** Filters available: equipment #, contract #, or PO#.	Allows drill down to actual rental contract for viewing and printing.
Rental Termination Requests	Shows equipment termination requests. Defaults to show 'OPEN' ones. Filters available: All, Open, Confirmed and Canceled	Allows drill down to see request info.
Account Summary	Provides an overview of account details, including aging and totals owed.	N/A
Job Cost	Displays all the contracts and a total associated with each specific job. Filters available: date. Group by: contract #, job #, project #, or PO#.	N/A
Payment History	Shows all payments for current year, listed by check number and date. Filters available: check #.	Allows drill down to actual invoices paid from check # & when applied.
Invoices	View all invoices. Filters available: date, contract #, PO #, open/paid/both, ROA's or late charges.	Allows drill down to actual invoices for viewing and printing.
Invoice Aging	View all unpaid invoices within each aging category. Filters available: ROA's, late charges.	Allows drill down to actual invoices for viewing and printing.
Sales Invoices	Shows all sales invoices for purchases of equipment, parts and merchandise. Filters available: date, contract #, or PO#.	Allows drill down to actual sales invoices for viewing and printing.
Rental History by Type of Equipment	Displays all equipment rented by a customer, by equipment type. Filters available: date, equipment type, or rental amount.	N/A
Rental Amount per Month	Provides summary of total dollars rented by month for current year. Filters available: date.	N/A
Completed Rental Transactions	Shows all returned, exchanged, and cycle billed invoices. Filters available: date, contract #, PO #.	Allows drill down to actual transactions for viewing and printing.

INSTRUCTIONS—EFI CUSTOMER PORTAL

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Creating a User Profile

Once you receive your Welcome Email, you will have the 'Authorization Code' and 'Verification Code' you need to create a 'User Profile'.

1. Go to EFI's website, efitn.com.

2. Click on the My Account link.

3. At the 'My Account' page, click on the First Time user link.

4. At the New User Set-up page, turn the CAPS LOCK on.

5. Enter the **Authorization Code** and **Verification Code** sent to you in their appropriate fields.

    NOTE: It must read exactly as sent to you. (copy and paste will work) Exp: O8CQ1FCEM0/TKXZPT9CIK

6. Click on the **Next** button.

    a. If an error message displays, click the Reset button and enter it again. Verifying it is exactly as sent to you- all caps, take special note of zero's and O's. If they still don't work, contact our admin at admincp@equipmentfindersinc.com.

7. Turn CAPS LOCK off.

8. At the New User Set-up (profile) page, complete the User Profile form.

    a. The email address entered will become your 'User ID'.

    b. Create a unique password (needs to be six letters/numbers). *NOTE: Passwords are case sensitive*.

9. Make sure to complete all required fields, marked by an *. Once finished, click on **Submit**.

10. The message 'Your profile has been successfully created.', displays. Click on **Log In**.

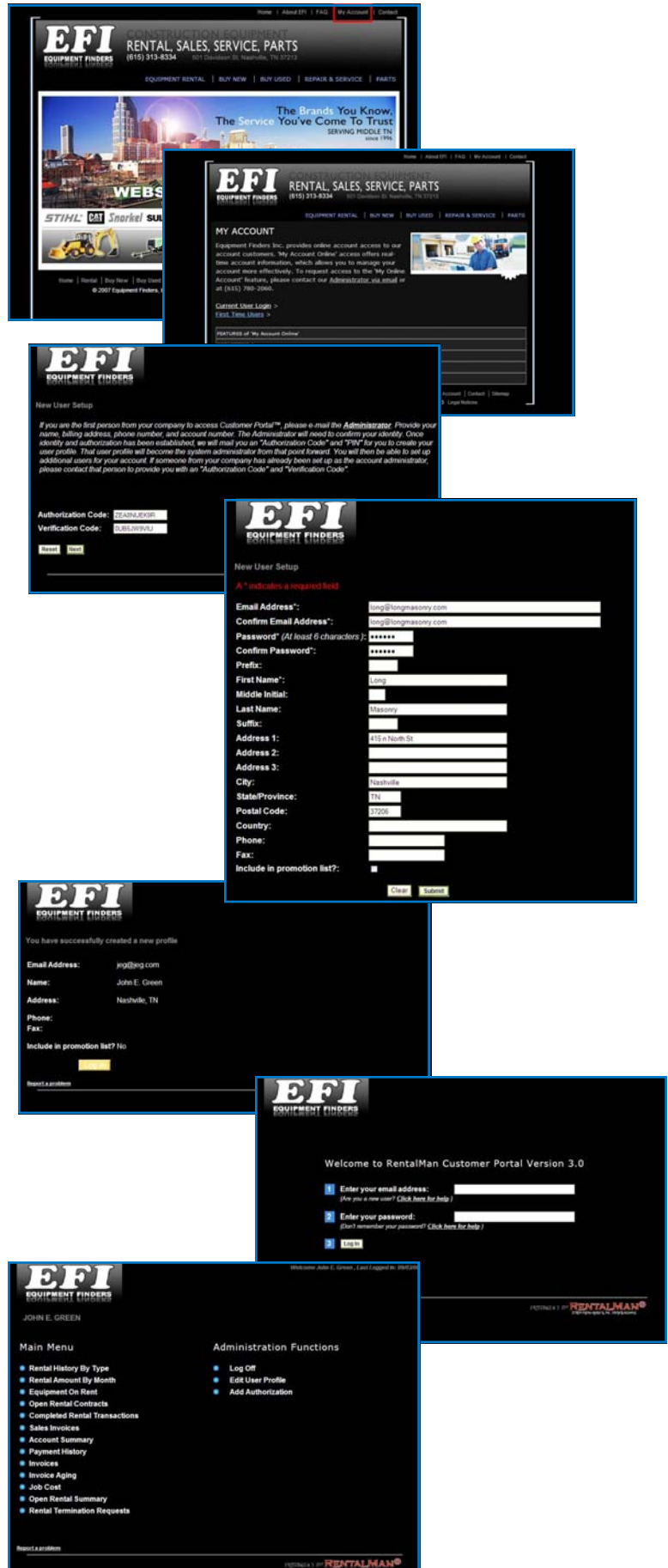11. At the 'Log In' screen, enter your **User ID** and **Password**.

12. Click on **Log In**.

13. The main menu displays.

14. From the main menu you can:

    a. View reports by clicking on the report name.

    b. Edit your User profile.

    c. Log Off.

   *NOTE: See 'Reports Available' table on page 2 for more information on the report options available.*

General Log In Information

Once you have created your user profile use the Current User Login link to log in.

1. At the 'My Account' page, click on the Current User Login link.

2. At the 'Log In' screen, type in your User ID in *field 1*.
   NOTE: *User ID is your email address.*

3. **TAB** to *field 2*, type in your password.

4. Click the **Log in** button.

5. The main menu displays.

6. From the main menu you can:

   a. View reports by clicking on the report name.

   b. Edit your User profile.

   c. Log Off.

   NOTE: See 'Reports Available' table on page 2 for more information on the report options available.
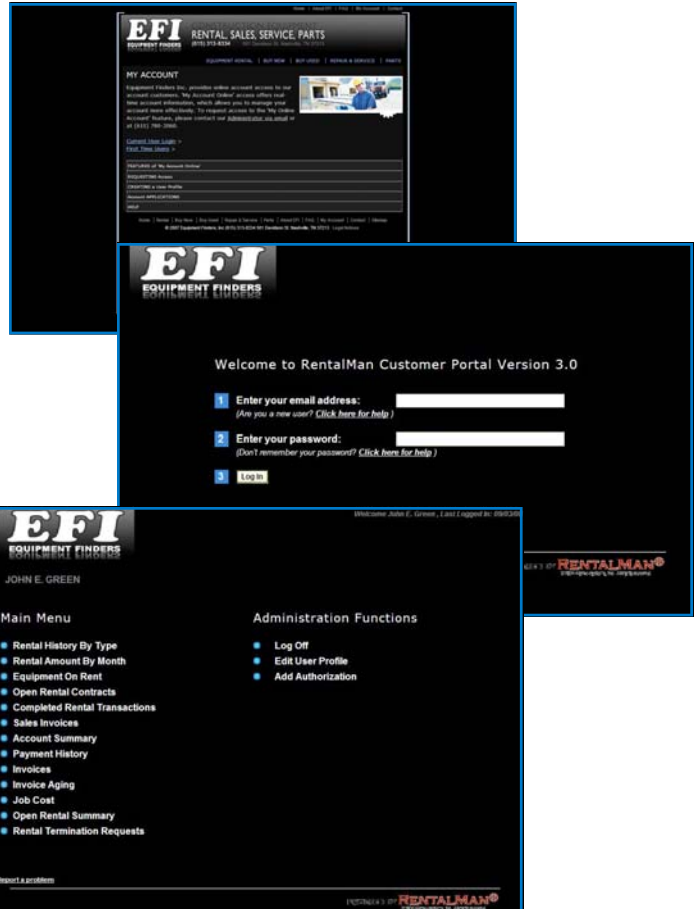
Forgotten Password

If you forget your password, complete the following steps:

1. At the Log in screen, click the Click here for help link, under the *password* field.

2. At the 'Reset Password' screen, type in your email address.

3. Press **Submit**.

4. The portal displays a message stating your new password has been sent to the email entered.

5. Go to your email, open the message (from admincp@equipmentfindersinc.com).

6. Your new password will be included.

   NOTE: You should reset your password as soon as possible.

7. Log in using your new password, then follow the steps in the Editing User Profile section to change your password.
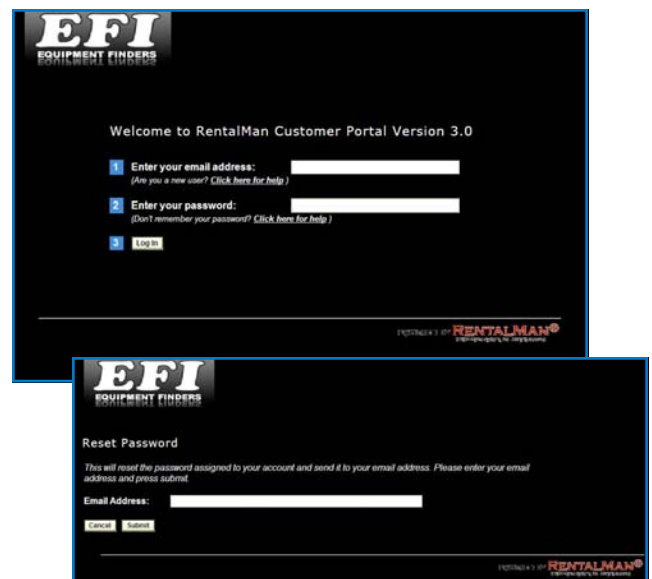
Editing a User Profile

If you need to edit your User Profile, complete the following steps:

1. At the main menu, click on **Edit User Profile**.

2. At the 'Update User Profile' screen, you can:

   a. Change your password—*the password must be 6 characters/numbers long*.

   b. Update or change all other fields, as needed.

3. Once all changes have been made, click **Submit**.

4. The portal displays a 'successful' change message.

5. Click **Main Menu** to return to the main menu.

Viewing/Printing Reports

VIEWING

1. To view a report, click on the **report name**.

2. Based on the default format of the report, the screen may show:

   a. The actual report information

   b. The search/filter options available for the report

   c. Or both

3. Use the **search/filter** options and **date range** fields that are available to narrow the report.

4. Click **Display,** to view results.

PRINTING

1. To print a report, use the browser print function.

2. The customer portal prints the report at your default printer.

Drilling Down within Reports

Within the available reports, links are provided to drill down to see more detailed information, such as; detailed information for a contract or invoice; to which invoices a check was applied to.

1. Open a report, such as Equipment On Rent. In the Contract column, all contract #'s are underlined. Anything underlined is a link to more detailed information.

2. Click on a **link** to see the information available. (see example below)

FROM REPORT

TO GENERAL INFORMATIONAL VIEW

TO PRINTABLE PDF OF CONTRACT, INVOICE, ETC...

Exporting Reports to Excel

A majority of the reports available are downloadable to Excel.

1. Open a report, such as Equipment On Rent.

2. Click on the **Download** button.

3. The File Download box displays;

    a. To simply open the report, click **Open**.

    b. To save the report to your computer, click **Save**.

4. When the report is opened, all records display (even if there was more than one page of the report). The report will need to be formatted to view information more easily. Use general Excel features to format as needed.

To 'Call' equipment off rent complete the following steps:

1. **Log In** to 'My Account Online'.

2. At the Main Menu, click on the **Equipment on Rent** report.

3. Find the piece(s) of equipment(that needs to be called off rent. The equipment is listed with the most recent contracts at the top. *NOTE: Each piece of equipment is listed separately on the report.*

4. Click on the Please stop rental link in the *Description* field for that piece of equipment.

5. The 'Rental Termination Requests' screen displays.

6. The Job Location line is the address where the equipment was delivered, verify this is correct. If NOT, enter the correct address in the *Address 1/2, City* fields.

7. Verify the **phone number** and **contact information** are correct. Enter corrections as needed.

8. Verify that the **equipment** selected is correct.

   NOTE: *If there are multiple pieces of equipment on the contract, all pieces of equipment display on the Rental Termination Request screen.*

9. All the pieces with a **Checkmark** in the box will be 'called off'. **Uncheck** any piece that should remain on rent.

10. Enter any **special instructions, contact information or comments** that our staff needs to be aware of when picking up this equipment.

11. Verify that the **correct information** is displaying.

12. Once all information is verified and is correct, click on the **Submit** button.

13. The portal displays the 'Rental Termination Request' screen. The portal gives you a termination request number.   *NOTE: the message in red—this is not a confirmed request at this point.*

14. The portal creates an email and sends it to our rental coordinators.

15. A pickup ticket will be created, then the termination request will be confirmed within the portal and a confirmation email sent to your email account with your pickup ticket #. *This number is your confirmation of the rental termination request.*
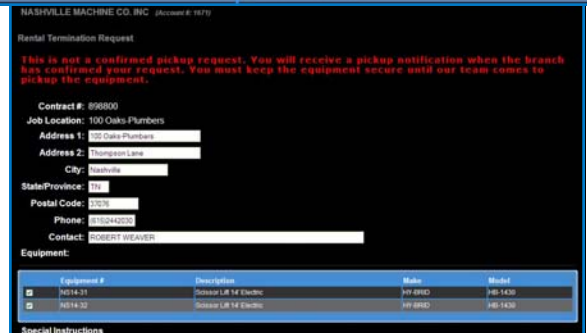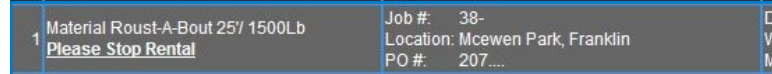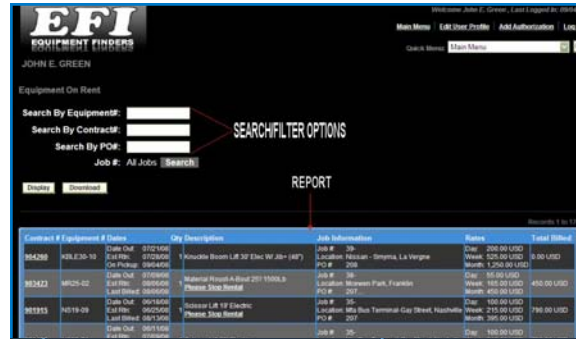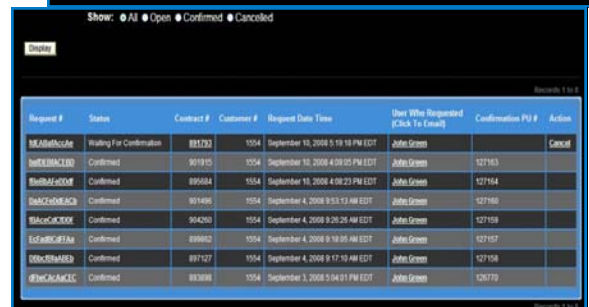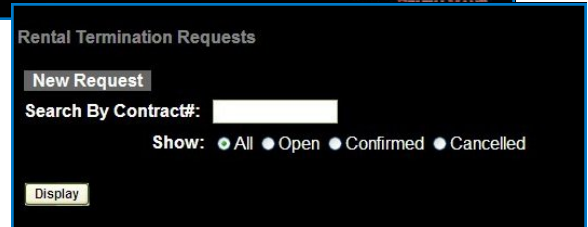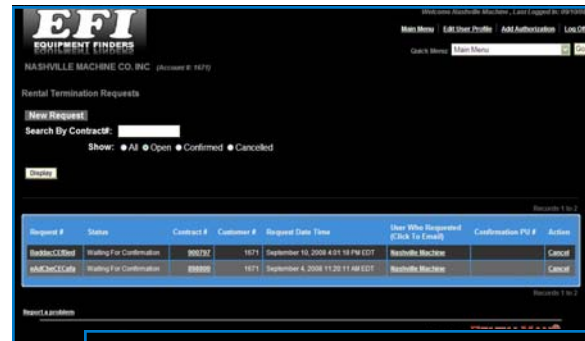
Viewing Rental Termination Requests

1. To view the status on any Rental terminations, click on the **Rental Terminations Request** option on the Main Menu.

2. The portal defaults to display 'Open' rental termination requests.

3. Select a 'show' option to view more than just 'open' termination requests, click on **Display** to view new selections.

SHOW OPTION	DESCRIPTION/FUNCTION
All	• Shows Open, Confirmed, and Cancelled terminations.
Open— (Waiting for confirmation)	• Shows all Open termination requests. Status shows as 'Waiting for Confirmation'. • '*Open' termination requests can be cancel online. See 'Canceling Rental Terms' section on page 10.*
Confirmed	• Shows all Confirmed (completed) termination requests. • *The Pickup # is located in the Confirmation PU # column.* This is your confirmation #.
Cancelled	• Shows all Cancelled termination requests.

4. The 'status' column displays the status of each rental termination request.

5. To see detailed information on the request, click on the Request # link in the Request # column.

6. The portal displays the detailed information for the selected rental termination.

Canceling a Rental Termination Request

1. To cancel a Rental termination request, click on the **Rental Terminations Request** option on the Main Menu.

2. The portal defaults to display 'Open' rental termination requests.

3. If a request is still 'Open (Waiting on Conf)', then it can be cancelled.

4. Click on the Cancel link in the Action column.

5. The portal displays the detailed rental term request, with a Cancel Request button. Click the **Cancel Request** button to cancel the rental term request.

6. The request is confirmed canceled, an email is sent to EFI's Rental Coordinators and to your email for verification.

7. The cancellation will now be viewable at the Rental Termination Request screen under the 'Cancelled' view.

   NOTE: If a rental term request needs to be cancelled, and you are unable to get to a computer, please call us @ 615-313-8334 and we will cancel it for you.