Customer Portal Overview

Cresco Equipment Rentals offers a web-based portal that allows you to access your Cresco account making it easy to manage what you have on rent, pay your bill, and run reports.

Below are the topics covered in this guide:

1. How to request an account if you do not have one already
2. Dashboard and Menu Bar Navigation
3. Paying Invoices
4. Printing and emailing payment confirmation
5. Creating and Using Reports
6. How to contact your Cresco sales representative should you have any questions

How to Create an Account

If you do not currently have an account, the first step is to become a credit customer with Cresco. Click this link to access the Credit Application. Once you have established a credit account with Cresco, you can request an account in a couple of ways.

Fill out the Customer portal request form found on our website under Customer / My account My Account – Cresco Equipment Rentals (crescorent.com). Alternatively, you can contact your Sales rep and request an account.
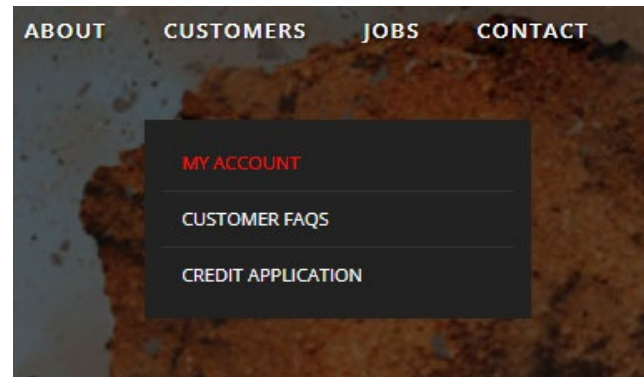
After your account has been created you will have access to manage your Cresco account from the web.

Customer Portal Dashboard Screen Layout

(next page with detailed explanation)

CRESCO EQUIPMENT RENTALS

Home   Rental and Sales Information ▾   Account Information ▾   Account Service ▾   Administration ▾

3
OPEN CONTRACTS

3
EQUIPMENT ON RENT

UNPAID INVOICES

Total	1,158,793.30 USD
Current	653.42 USD
30 Days	8,720.31 USD
60 Days	1,638.31 USD
90 Days	
120 Days	1,147,781.26 USD

ACCOUNT SERVICES

PAY INVOICES

Menu

Rental and Sales Information
Rental History By Type
Rental Amount By Month
Equipment On Rent
Customer On Rent Equipment
Equipment By Estimated Return
Open Rental Contracts
Completed Rental Transactions
Open Sales Orders
Pickup Requests
Equipment Availability

Account Information
Sales Invoices
Account Summary
Payment History
Invoices
Invoice Aging
Job Cost
Automated Monthly Billings
Open Rental Summary
My Contract Rates
Auto Email Reports

Account Service
Pay Invoices

Administration Functions
Switch Authorization Codes
Edit User Profile
Add Authorization

At the top of the screen, you will see five drop down links, these links offer quick access to the same links found on the right side of the portal.

Menu list to access different functions on right hand side of screen

Home   Rental and Sales Information ▾   Account Information ▾   Account Service ▾   Administration ▾

Menu

Rental and Sales Information
Rental History By Type
Rental Amount By Month
Equipment On Rent
Equipment By Estimated Return
Open Rental Contracts
Completed Rental Transactions
Open Sales Orders
Pickup Requests
Equipment Availability

In the two top boxes you can click to view open contracts or Equipment on Rent.

| 3 OPEN CONTRACTS | 3 EQUIPMENT ON RENT |

Account Information
Sales Invoices
Account Summary
Payment History
Invoices
Invoice Aging
Job Cost
Automated Monthly Billings
Open Rental Summary
My Contract Rates
Auto Email Reports

In the two bottom boxes you can view unpaid invoices or click on the Pay invoices button to pay invoices.

UNPAID INVOICES	
Total	1,149,442.94 USD
Current	1,660.18 USD
30 Days	
60 Days	0.02 USD

ACCOUNT SERVICES
PAY INVOICES

Account Service
Pay Invoices

Administration Functions
Switch Authorization Codes
Edit User Profile
Add Authorization

On the right side you will see a list of reports under Rental and Sales Information, these reports are real time and instant. You can search your rental history, equipment on rent, open contracts and much more.

Under the Account information you can view sales invoices, account summaries and more.

You can also setup automated reports that will email you (or several people) on a schedule you setup.

Menu

Rental and Sales Information
Rental History By Type
Rental Amount By Month
Equipment On Rent
Equipment By Estimated Return
Open Rental Contracts
Completed Rental Transactions
Open Sales Orders
Pickup Requests
Equipment Availability

Account Information
Sales Invoices
Account Summary
Payment History
Invoices
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Through the "Pay invoices" screen you can make a payment on any invoice using a credit card. Select the invoice(s) and click on the Make Online Payment button. Note: you can select and pay multiple invoices at one time.

Pay Invoices

From Date:

`01/01/2022`

To Date:

`05/16/2022`

Search By Contract#:

Search By PO#:

Job #:

All Jobs | Search |

| Filter | Download | Hide Search Options |

| Make Online Payment |

Invoice #	Date	Status	PO #	Job Information	Branch	Original Amount	Balance	Pay
5441538-0001	01/10/22	Partial Pay	TEST PO	Job #: TEST Location: Test	Livermore, CA (106)	5,437.50	5,436.50 ☐	5436.50
5441539-0001	01/10/22	Unpaid	TEST PO	Job #: TEST Location: Test	Livermore, CA (106)	5,437.50	5,437.50 ☐	5437.50

On the "Payment Detail" screen you will then be able to enter your credit card information.

Payment Detail

Please verify the invoice(s) and amount(s) that have been selected for payment. Proceed to Payment Information below.

Invoice #	Amount
5441538-0001	5,436.50

Total to be processed: $5,436.50

Billing Information

(All fields below are required)

First Name:

Last Name:

Billing Address:

Billing City:

Billing State:

Billing Postal Code:

All financial information is transmitted securely to the Wynne Systems gateway through a 128bit encrypted connection. Additionally, no financial information is stored locally on this site.

American Express

Visa, MasterCard, Discover

4 Digit Verification Number

3 Digit Verification Number

Name On Card:

Credit Card Type:

`Visa`

Credit Card number:

Expiration Date: (MM/YY)

Card Verification Number:

| Authorize Payment | Cancel Transaction |

Payment Receipt Printing and Emailing

Once your payment has been processed you are able to print or email a receipt.

Thank you for your payment.

Your payment has been posted to your account. To search for your payment, please use the Reference Number as your check number.

Please print and or email this receipt for your record.

Name On Card:	Jane Doe
Credit Card Type:	MasterCard
Credit Card number:	xxxx*765
Submitted Date:	03/20/18
Payment Amount:	$1.00
Reference Number:	6575397

Print Receipt   Email Receipt

Also, you can view the payment in the payment history screen by matching the reference number* to the check number column.

***In the payment history screen there is an additional number placed at the start of your reference number in the check # column.**

Payment History

Search By Check#:

From Date:
01/01/2022

To Date:
06/03/2022

Filter   Download   Schedule   Hide Search Options

Records 1 to 4

Date	Check#	Total
06/03/22	015870892	6.32

Auto Email Reports

Name:

Report Name

Recipients:

Email address/s

Recipients: *(Multiple addresses separated by semi-colon (;), comma (,) or space e.g.: johnd@mail.com;mk@mail.com)*

Status:

Active

Start Date:

05/16/2022

10   45   AM   Pacific Standard Time

You can set a start date and time, name the report so its relevant to you, and add as many email addresses that are needed.

Recurrence:

Daily

◉ Every 1 day(s)

○ Every Weekday

Here you can set the schedule on how often the report runs.

Expiration:

◉ Never

○ On

05/16/2022

Rental History By Type
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Equipment By Estimated Return
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Job Cost
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Open Rental Summary
Pay Invoices

Here is the list of available reports, these reports are canned and can not be changed.

Equipment On Rent

This was a brief overview of the customer portal, if you have any questions or would like more information, please reach out to your Sales representative. If you are not sure who your sales representative is visit our branch locator and find the store nearest you. Then click on the Location Details Link for that store.

Branch Locator - find your nearest store and sales representative

My Account - log into customer portal

Credit Application - apply for a Cresco credit account