

STRAIGHTDOCS COMPLIANCE SERVICES

ASK ABOUT OUR 24-HOUR CERTIFICATE GUARANTEE

DEALER CHALLENGE

VERIFICATION

Many rental dealers collect certificates during the rental transaction but do not check for proper proof of coverage.

PREVENTION

Prevention is less costly and less risky than a solution after a problem arises.

PROTECTION

Risk management requires a comprehensive plan in order for a rental business to run smoothly. The best risk management plans maximize profit while limiting exposure to risk.

ARCHIVING & ORGANIZATION

Multi-location dealerships face unique challenges for filing documents in a secure and easily accessible location.

STRAIGHTDOCS

COMPLIANCE SERVICES SOLUTION

- Verifies the certificate of insurance is both current and valid.
- Contacts the insurance company on the dealer's behalf.
- Comprehensive plan for certificate management and sales tax exemption forms.
- Limits exposure to risk.
- StraightDocs Compliance Services was designed specifically for equipment dealers.
- StraightDocs Compliance Services helps dealers protect their assets and is fully endorsed by JT Bates Group, a firm with over 30 years' experience in the equipment industry.
- Certificates and sales tax exemption forms are stored in a secure database.
- Paperless archiving system is web-based and is a perfect solution for a multi-location dealership.



GET A QUOTE TODAY
TO FIND OUT HOW WE CAN HELP YOU
WITH YOUR RISK MANAGEMENT NEEDS

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Georgetown, TX 78626



STRAIGHTDOCS COMPLIANCE SERVICES

THE BEST COMPLIANCE SERVICES IN THE INDUSTRY

HOW StraightDocs CERTIFICATE MANAGEMENT WORKS:

- 1 The equipment dealer sends a customer list and hard or soft copies of the certificates of insurance.
- 2 JT Bates Group trains the dealer rental staff and then enters the certificate information into StraightDocs.
- 3 As new certificates of insurance are collected from renters, they are emailed to JT Bates Group for management.
- 4 JT Bates Group reviews the certificates of insurance for accuracy and validity, contacts the insurance carrier if needed, and enters the data.
- 5 Equipment dealer receives a monthly expiration report from JT Bates Group detailing the certificates of insurance set to expire over the next 30 days.
- 6 Equipment dealer indicates through the online StraightDocs portal which certificates need to be updated, and JT Bates Group contacts the carrier on behalf of the dealer.

COMPREHENSIVE MANAGEMENT OF:

- Certificates of Insurance
Vendor, Customer, Sub-Hauler
- Motor Carrier Permits
- Claims Tracking
- Sales Tax Exemption Forms



STRAIGHTDOCS COMPLIANCE SERVICES IS A PRODUCT OF JT BATES GROUP.

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