Contacts

Contacts are the individuals that your company deals with. These individuals can exist within a customer's company, they can represent several companies, or they can even be independent freelancers. Once a contact exists in RentalPoint, it can be linked to several accounts including customers, venues, bookings, and technicians. The contact management area of the system manages all of these contacts and is where most actions for contacts can be facilitated.
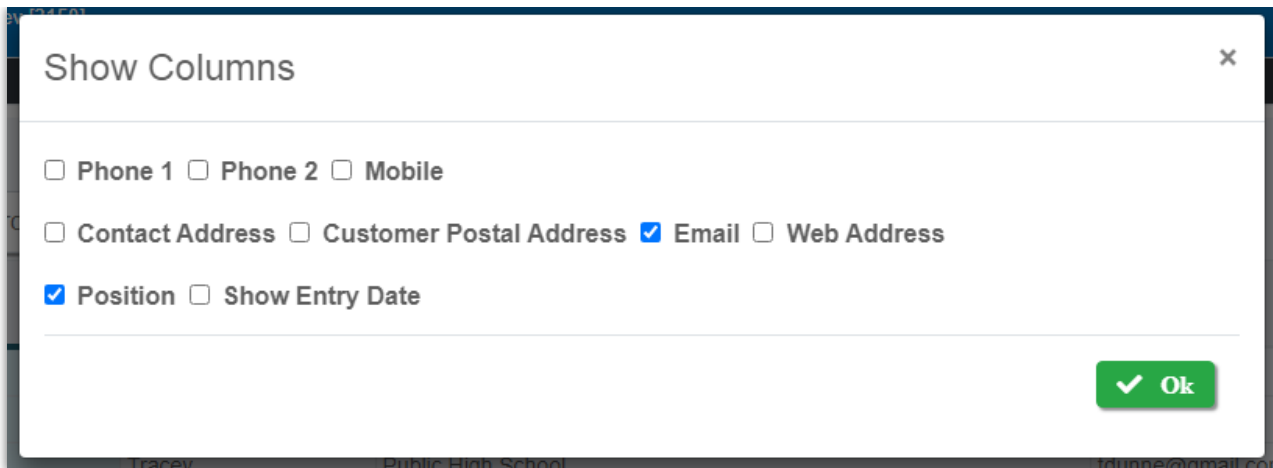
Contacts Control Panel

Fig 1.1 - reference the number on the screenshot against the index below for more detail

1. Access to the Contacts Action menu

2. Use to select columns to display on the grid

Show Columns

☐ Phone 1 ☐ Phone 2 ☐ Mobile

☐ Contact Address ☐ Customer Postal Address ☑ Email ☐ Web Address

☑ Position ☐ Show Entry Date

✔ Ok

3. Select Contact Scope allows for a more targeted view of contacts - use this in conjunction with 7 below to narrow the scope further.

'Current' will show all records edited/updated/added recently.
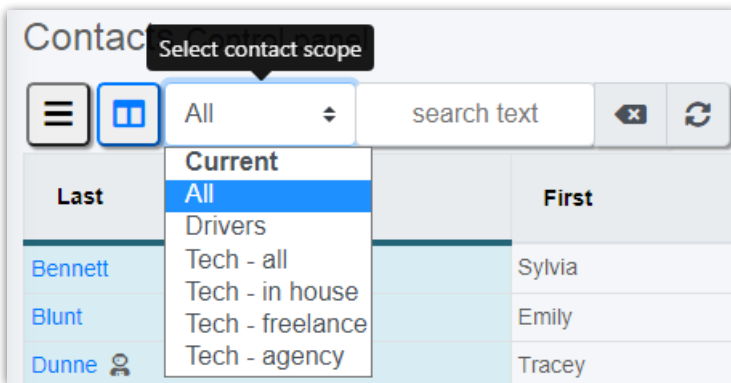
4. Enter search text to search for a specific contact or contacts for a particular company

5. Narrow the scope to a selected salesperson

6. Easily identify technician type and driver status via icons & colouring on the grid as (as set on the contracting tab for each technician):
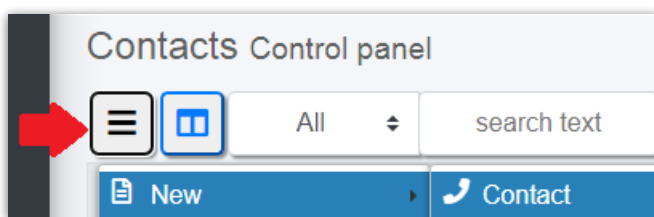
- In house technician
- Agency technician
- Freelance technician (displays in green)
- Truck driver
- Project Manager

7. Narrow the grid scope by setting the number of months to look back for updated contact records.
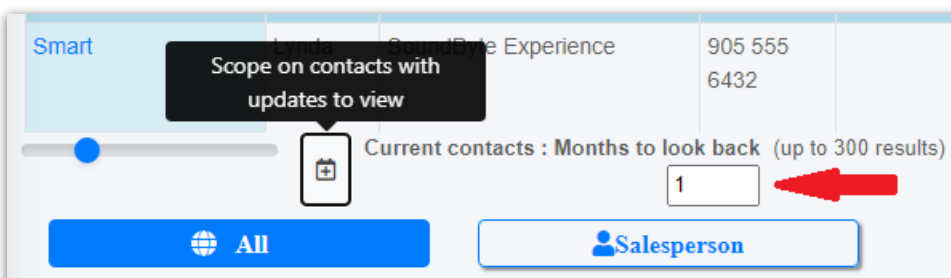
The Contact Record

Use the menu option to add a new contact OR double click on an existing contact on the grid to edit
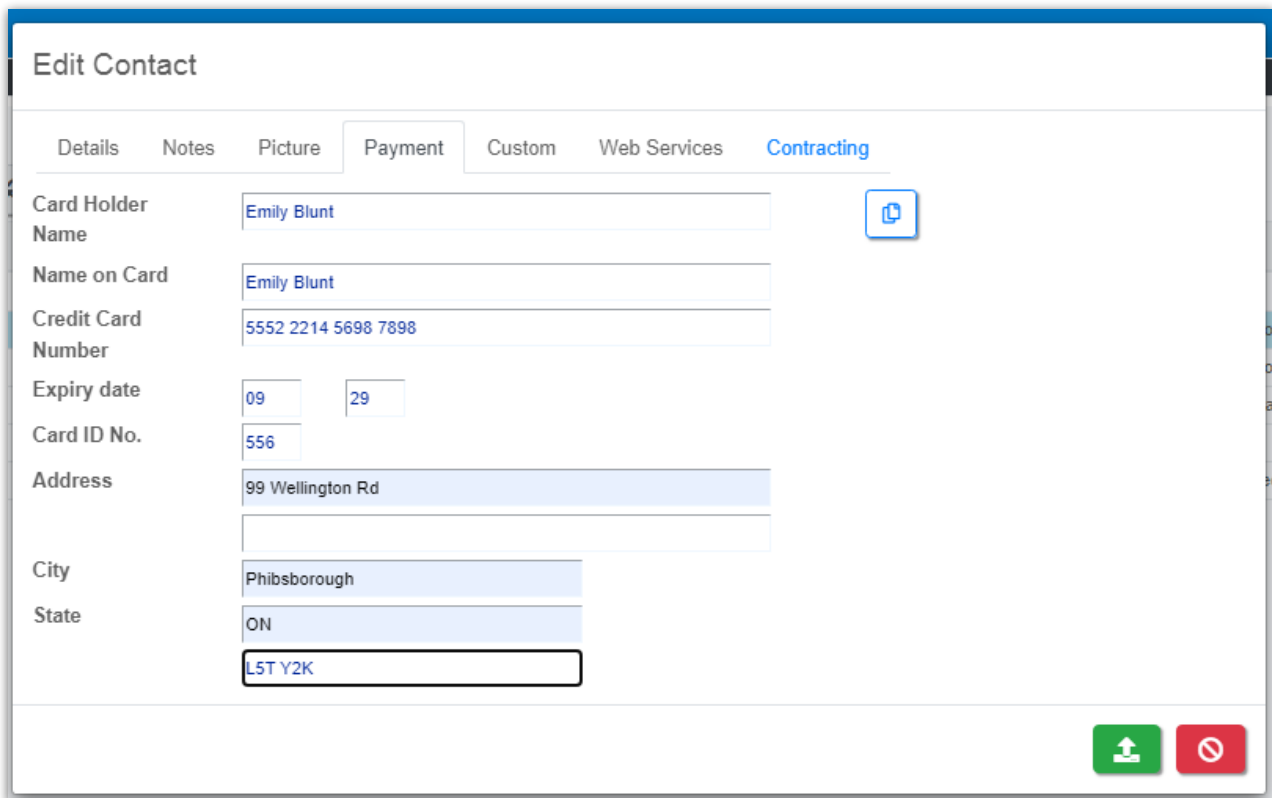

Details

Notes

Contains all notes pertaining to this specific contact.

Picture

Contains a picture of contact

Payment

Contains credit card information for the contact, encrypted when stored in the database

Custom

The Custom tab holds miscellaneous information that is not provided for in the standard fields. All fields are given specific names by the user through the Contacts Parameters option (currently only available in RentalPoint2) on the right click menu of the contacts.
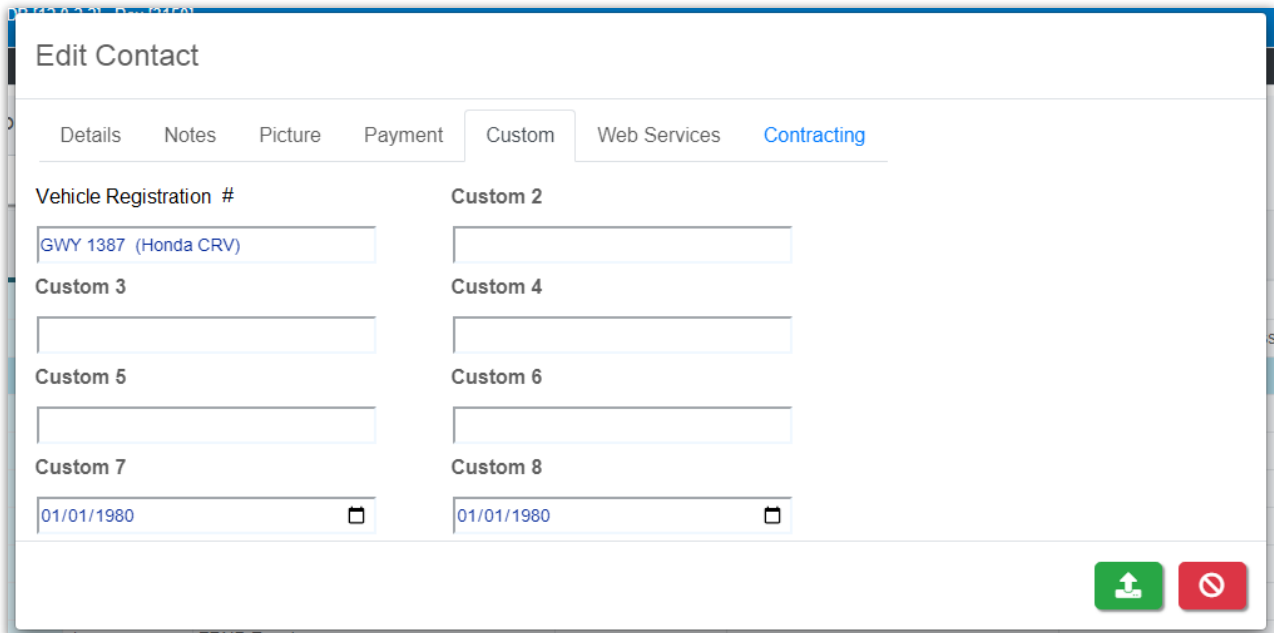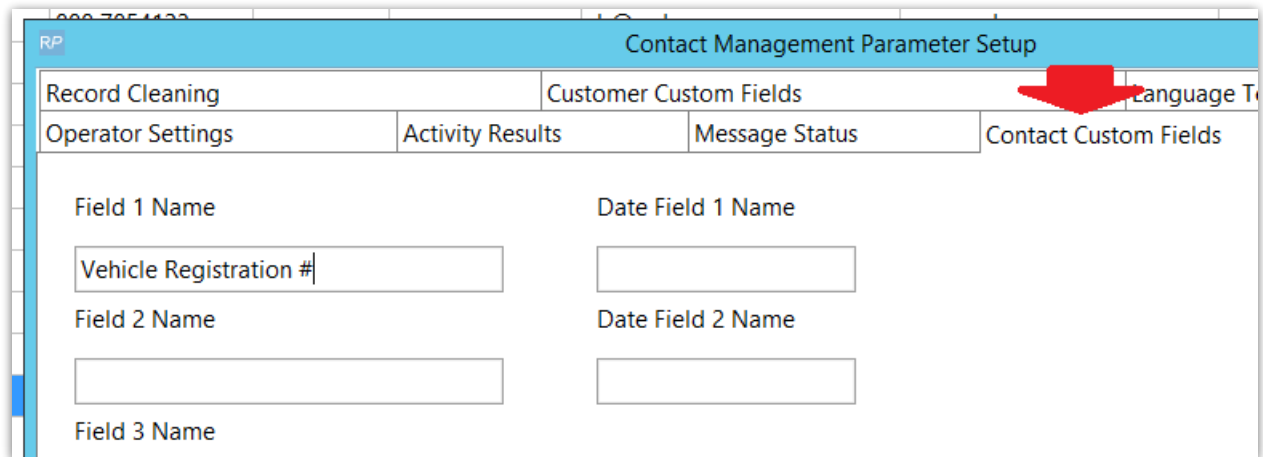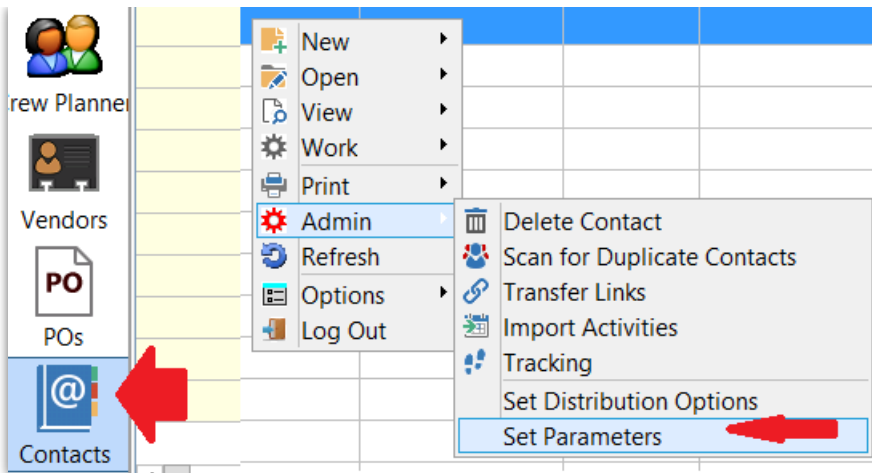
Web Services

Used in conjunction with *RentalPoint Technician Web Calendar*

Contracting

Used to identify contacts as *Technicians*

Activities

➕ Set Up New Activities

➕ Create Technician Activity

➕ Recurring Activity

➕ View/Modify Technician Activities

➕ Delete a Scheduled Activity

➕ Complete a Scheduled Activity

➕ Use Activities to Show Crew UnAvailability

➕ Operator Privileges Affecting Activities

➕ Parameters Affecting Activities