

# Contacts

Last Modified on 12/05/2023 10:02 am EDT

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

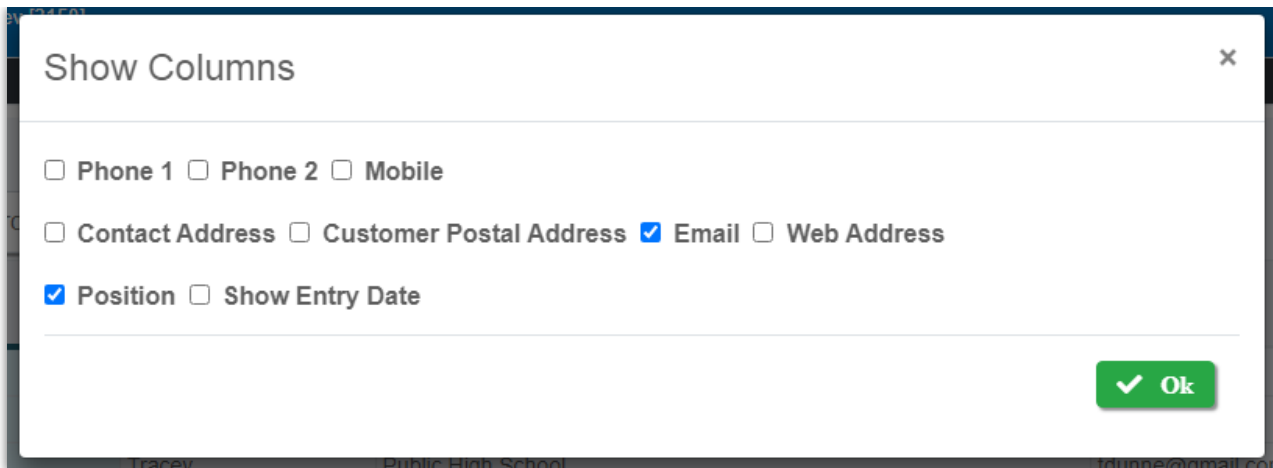
Fig 1.1 - reference the number on the screenshot against the index below for more detail

The screenshot shows the 'Contacts Control panel' interface. At the top left, there is a hamburger menu icon (1) and a column selection icon (2). To the right of these icons is a dropdown menu set to 'Current' (3) and a search text input field (4). Below the search bar is a table with columns: Last, First, Company Name, and Email. The table contains several rows of contact information, with the row for 'O'Reilly, Thomas' highlighted (6). Below the table, there is a pagination control showing '(up to 300 results)' (7) and a filter button labeled 'All' (5). A 'Salesperson' button is also visible.

1. Access to the Contacts Action menu

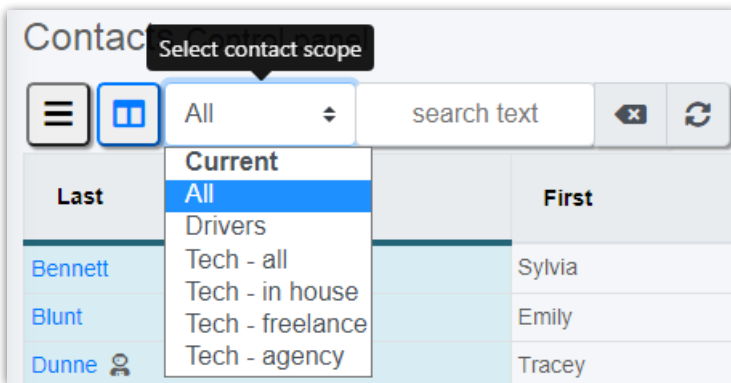
This close-up screenshot shows the 'Contacts Control panel' with a red arrow pointing to the hamburger menu icon (1). The menu is open, displaying a list of actions: New, Open, View, Admin, and Print. The 'New' action is expanded, showing sub-options: Contact, Customer contact, Customer, Activity, and Booking.

2. Use  to select columns to display on the grid



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.



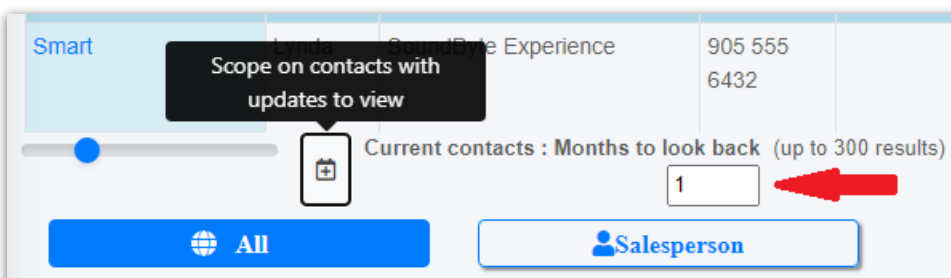
4. Enter search text to search for a specific contact or contacts for a particular company

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):

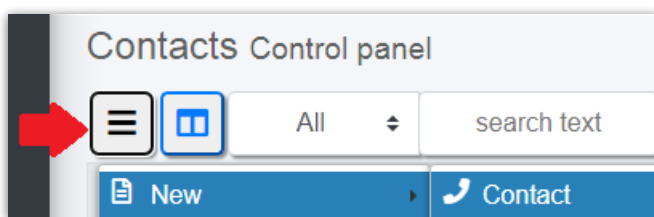
-  In house technician
-  Agency technician
-  Freelance technician (displays in green)
-  Truck driver
-  Project Manager

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

**Add Contact**

Details | Notes | Picture | Payment | Custom | Web Services | **Contracting**

<b>Contact</b>	<b>First Name</b>	<b>Middle</b>	<b>Last Name</b>	
	<input type="text" value="Tracey"/>	<input type="text"/>	<input type="text" value="Dunne"/>	
<b>Dept.</b>	<input type="text" value="Admin"/>	<b>Position</b>	<input type="text"/>	
<b>Drivers license</b>	<input type="text" value="F887766090"/>			
<b>Address</b>	<input type="text" value="8877 Cabbot Trail"/>			
	<input type="text" value="Ballydown"/>			
	<input type="text"/>	<b>State</b>	<input type="text"/>	
<b>Country</b>	<input type="text" value="Canada"/>	<input type="text"/>		
<b>Email</b>	<input type="text" value="tdunne@gmail.com"/>			
<b>Website</b>	<input type="text" value="www.myschoolsite.com"/>			
	<b>Country</b>	<b>Area</b>	<b>Number</b>	<b>Ext.</b>
<b>Phone 1</b>	<input type="text"/>	<input type="text" value="789"/>	<input type="text" value="5447663"/>	<input type="text"/>
<b>Phone 2</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Notes

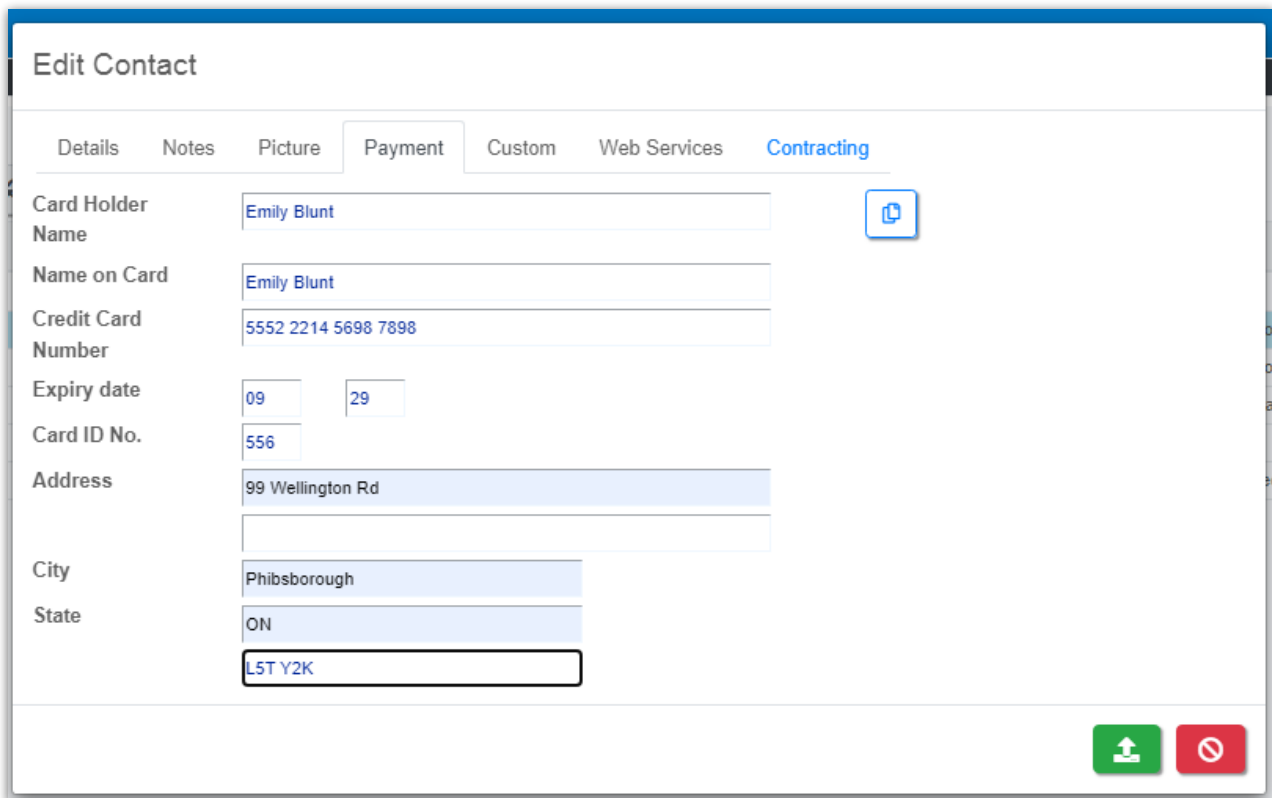
Contains all notes pertaining to this specific contact.

## Picture

Contains a picture of contact

## Payment

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



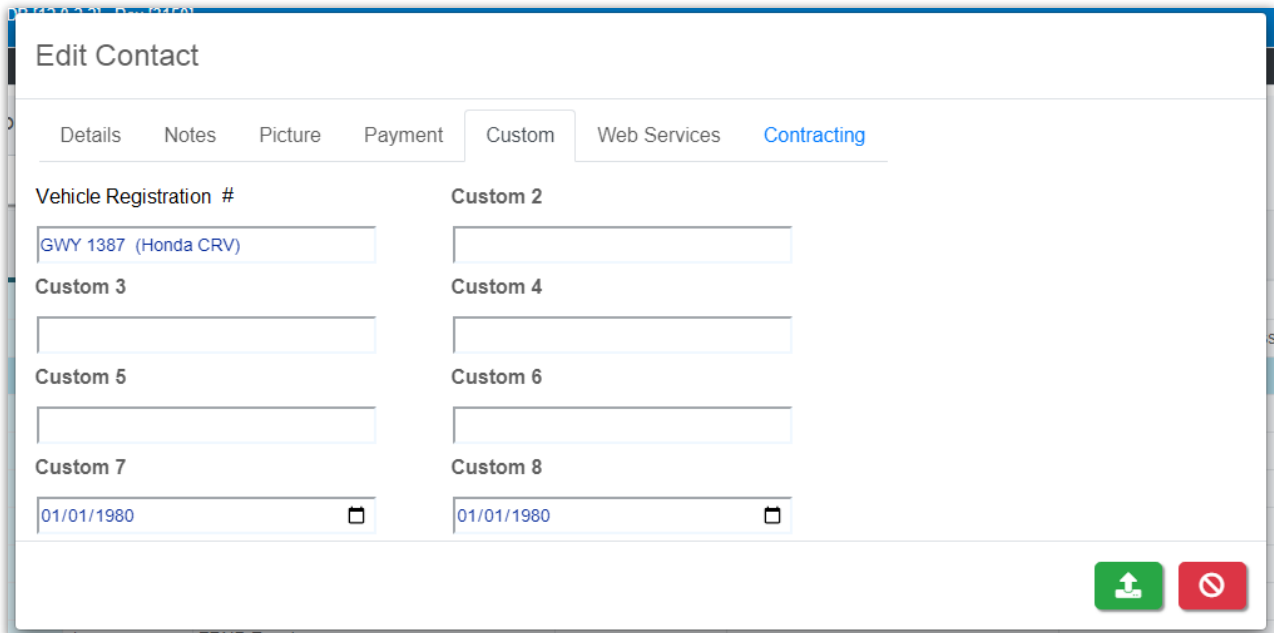
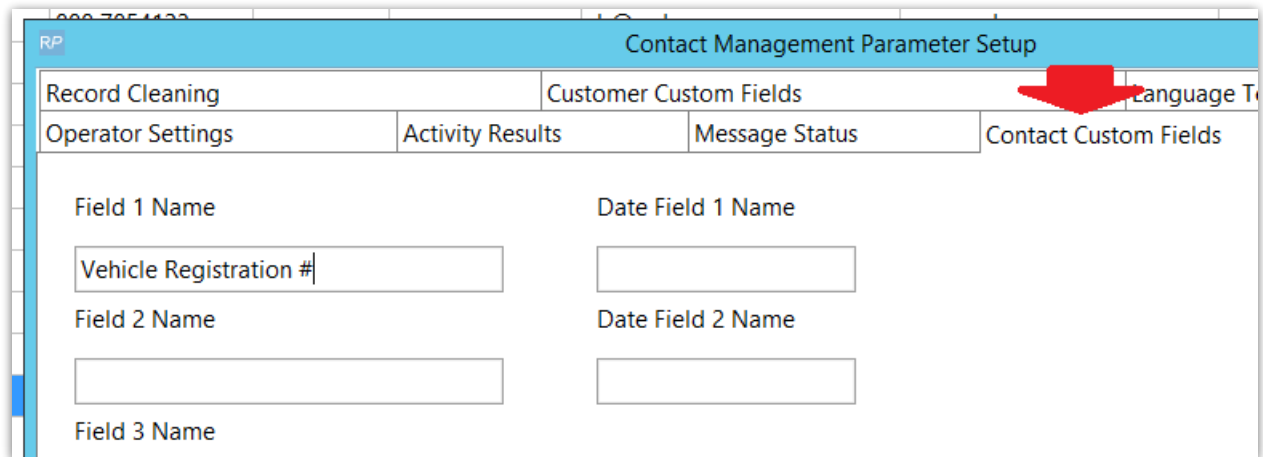
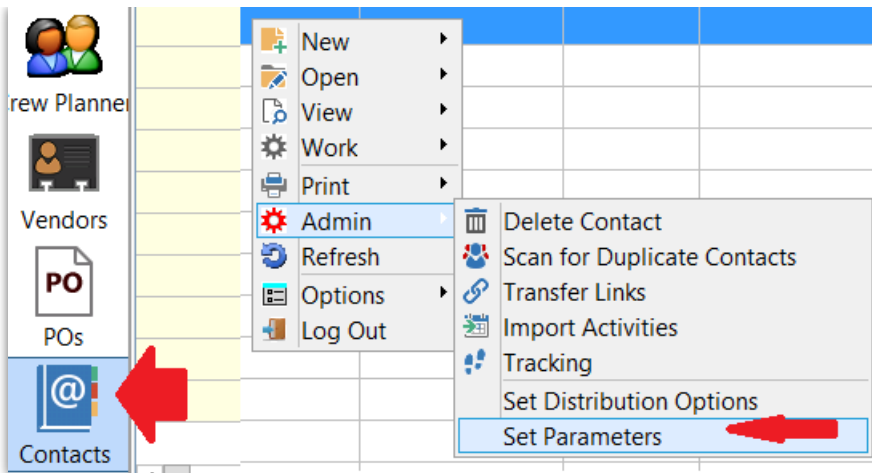
The screenshot shows the 'Edit Contact' form with the 'Payment' tab selected. The form contains the following fields:

Field	Value
Card Holder Name	Emily Blunt
Name on Card	Emily Blunt
Credit Card Number	5552 2214 5698 7898
Expiry date	09 / 29
Card ID No.	556
Address	99 Wellington Rd
City	Phibsborough
State	ON
	L5T Y2K

At the bottom right of the form, there are two buttons: a green button with an upward arrow and a red button with a prohibition sign.

## 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

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## 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
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