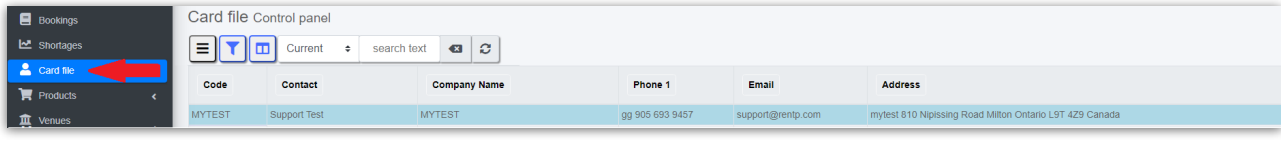


Card File Control Panel

Last Modified on 12/05/2023 2:17 pm EDT

Customer/Vendor account maintenance and financials



Customer/Vendor Grid

The Card file contains a list of the customers and vendors that your company does business with. Information stored includes contact, address, phone, notes, financial and account information. Access to sections of the information can be restricted to individual users via Operator Privileges where necessary. Identify vendors using the checkbox on the main screen

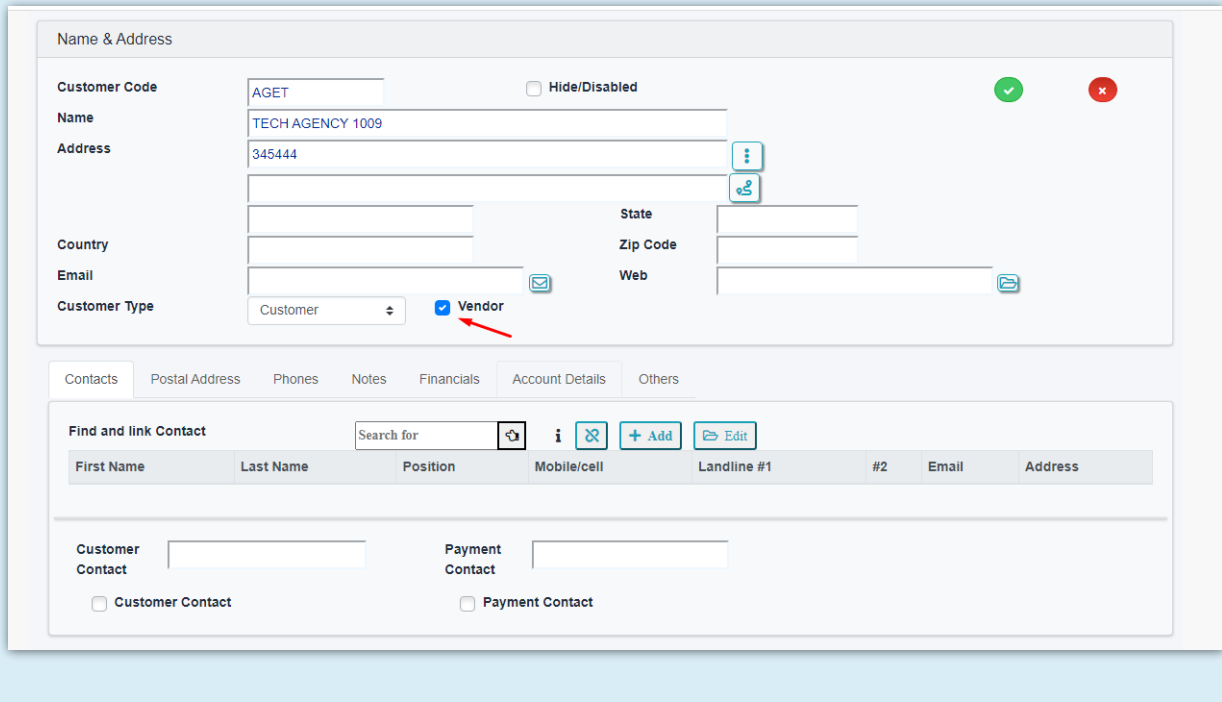
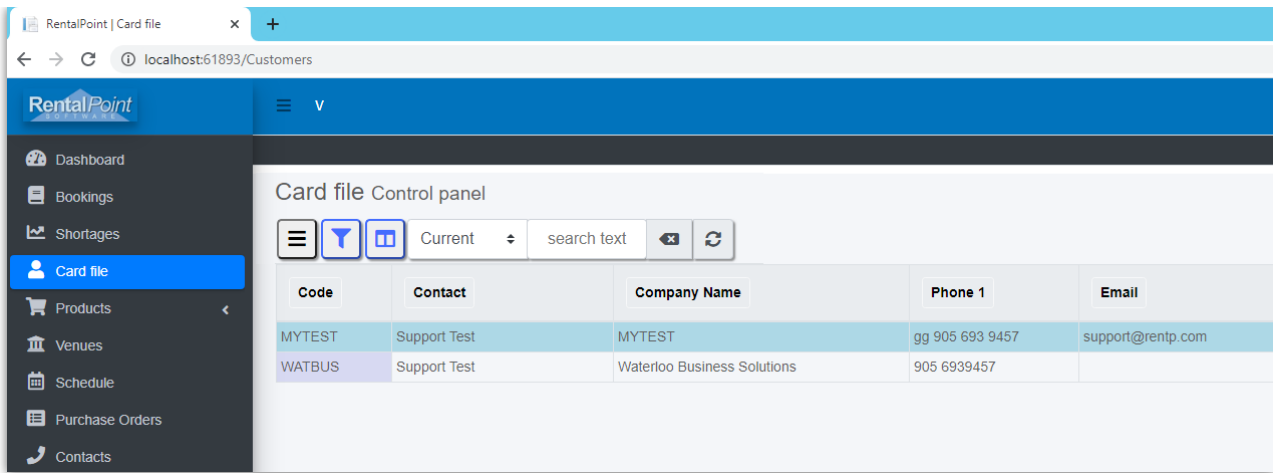


Fig 1.1




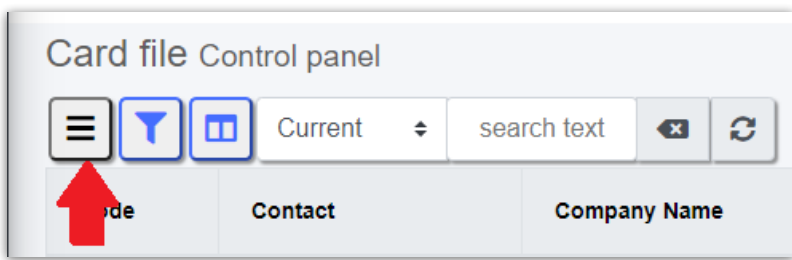
Use the  icon OR right click on the card file grid to access the menu options (Fig 1.2 below)

Fig 1.2




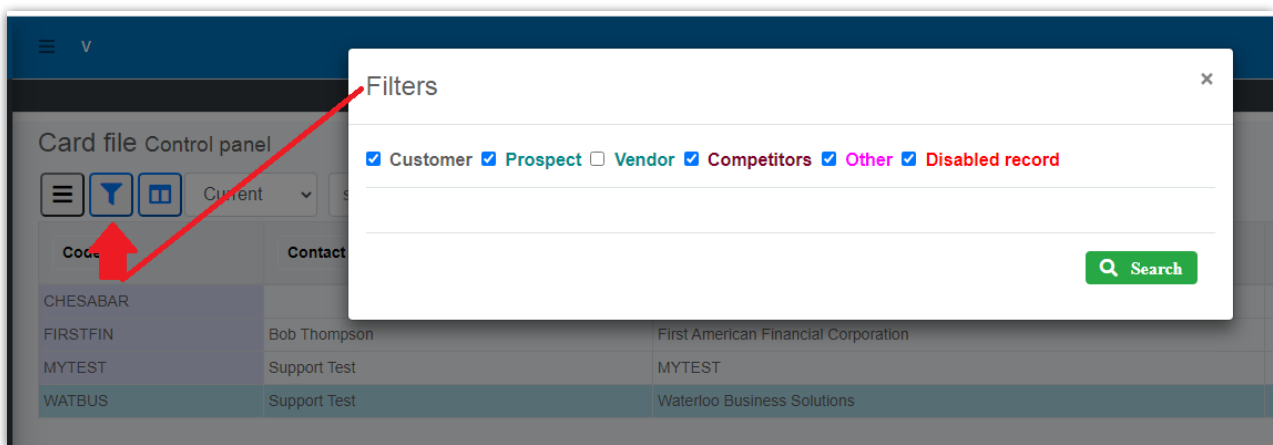
Use the  icon (fig 1.3 below) to control the types of record that show up on the grid (Fig 1.3 below)

Fig 1.3




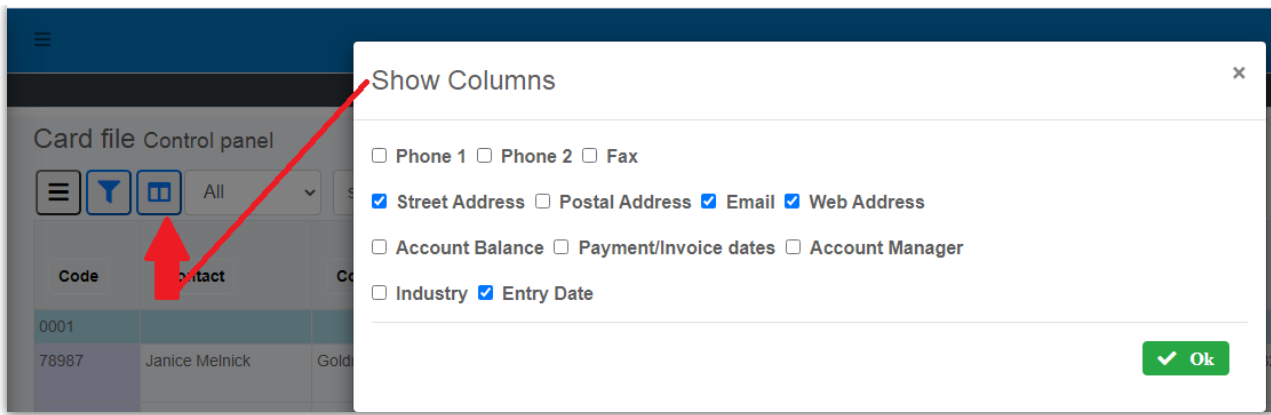
Use the  icon (see fig 1.4 below) to select the information that will display on the grid for each customer record (Fig 1.4 below)

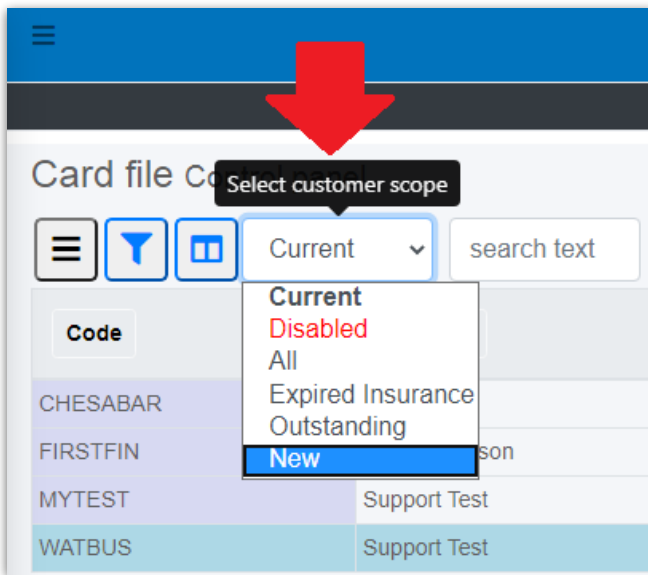
Fig 1.4



Select the scope of the display from the drop down menu (Fig 1.5 below)

- Current = display active customers only
- Disabled = display disabled customer only
- All = display all customer records
- Expired Insurance = display only those records with expired insurance
- Outstanding = display only those records with an outstanding balance
- New = display new customers only

Fig 1.5




Search text (Fig 1.6) will search multiple fields for the text entered, all records that contain the search criteria will be returned to the grid (delete the search text to reset to unlimited search)


Fig 1.6

Card file Control panel

mytest

Code	Contact	Company Name	Email	Address
BCUST	asdfasdf asdfasdf	B Company	mytest	B Company test test test TEST test
MYTEST	Support Test	MYTEST	support@rentp.com	mytest 970 Nipissing Road Milton Ontario L9T 4Z9 Canada
NEWCUST	mytest MYTEST	NEWCUST	support@rentp.com	NEWCUST TEST TEST TEST TEST

Use the  icon to clear the search box (Fig 1.6 above)

Use the  icon to refresh the grid (Fig 1.6 above)

New Customer/Vendor


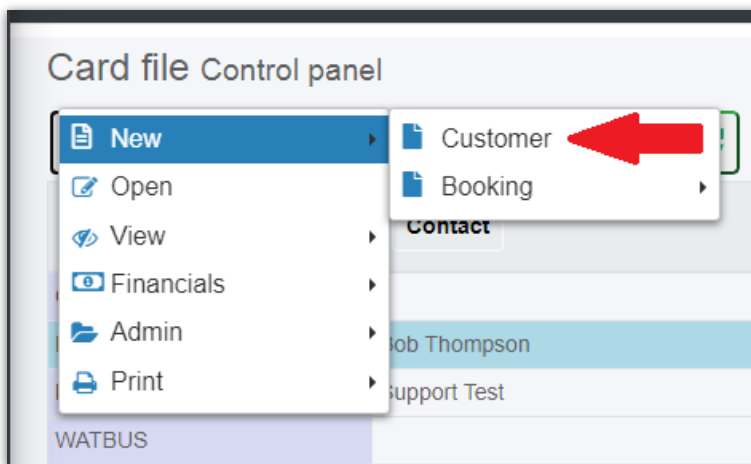
From the **Customer Grid**, set up a new customer using the  customer menu option (see fig 1.1 below)

Fig 1.1



Once you've entered the customer name and address, click through the additional tabs at the bottom of the form to complete customer setup (see Fig 1.2 below).

Fig 1.2

Customer Code: WATBUS Hide/Disabled

Name: Waterloo Business Solutions
2255 Dundas Street West

Country: Canada State: Ontario Post code: L5K 1R6

Customer Type: Customer Vendor

Contacts | Postal Address | Phones | Financials | Account Details | Notes

Find and link Contact Search text + Add Edit

First Name	Last Name	Position	Mobile/cell	Landline #1	#2	Email	Address
Joe	Soap		777 777-999	757 549-3549			676 Independence Parkway Suite 100 Chesapeake 23320
Support	Test		654 123 6548	905 693 9457		support@rentp.com	2255 Dundas Street West Mississauga L5K 1R6

Customer Contact: Support Test Payment Contact: Support Test

Customer Contact Payment Contact

Customer/Vendor Contacts

Vendors are identified within the customer record. Use the vendor checkbox to identify your customer as a vendor, then proceed to add contacts as below.

Customer Code: AGET Hide/Disabled

Name: TECH AGENCY 1009
Address: 345444

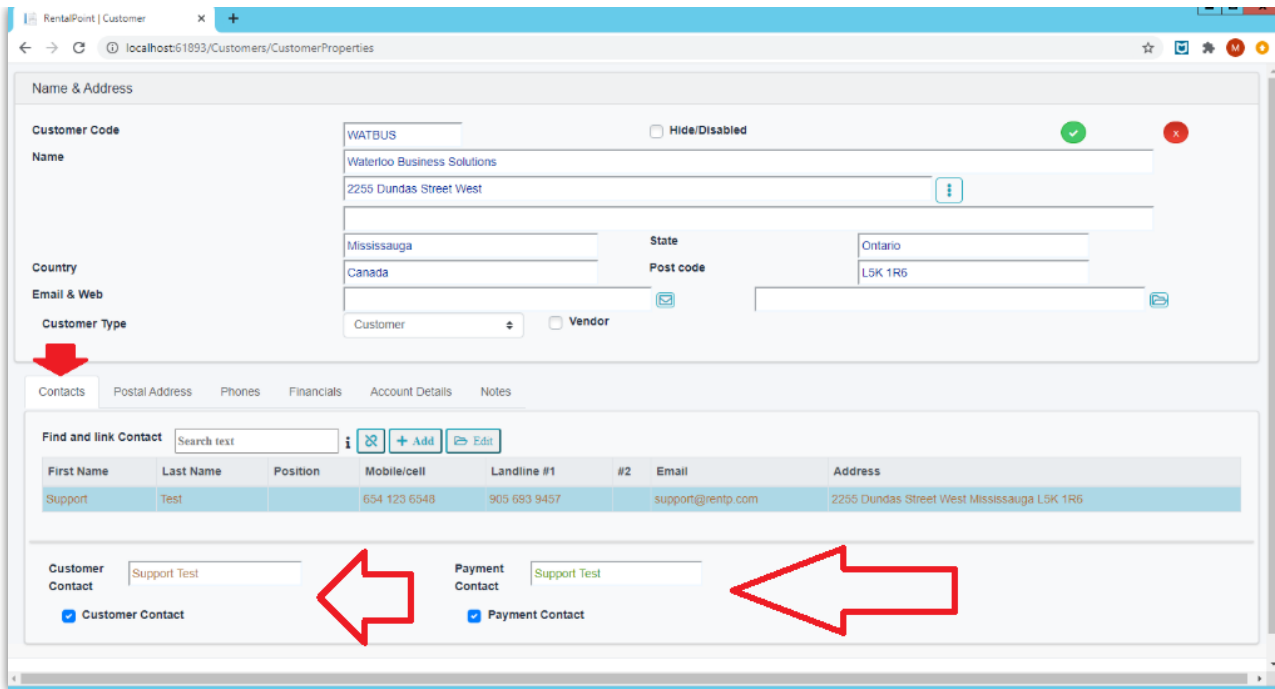
Country: State: Zip Code: Web:

Customer Type: Customer Vendor

Within the Customer Record, maintain a list of associated contacts. The contact need only be set up in the database once and can then be linked with many customers/vendors if needed. New contacts can be added from within a customer record and/or existing contacts can be linked to the customer as outlined below.

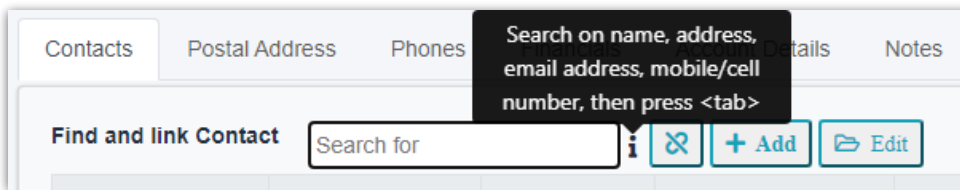
Use the Customer Contact and Payment Contact checkboxes (Fig 1.1 below) against any contact record to identify the contact associated with that role in the company



Fig 1.1

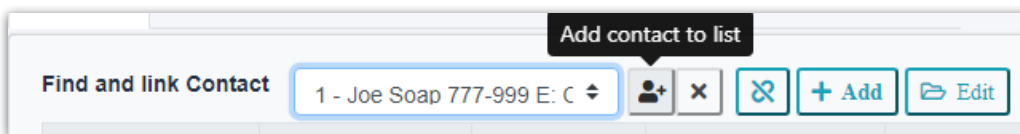


Use the options in Fig 1.2 below to search for an existing contact record to link to this customer.

Fig 1.2

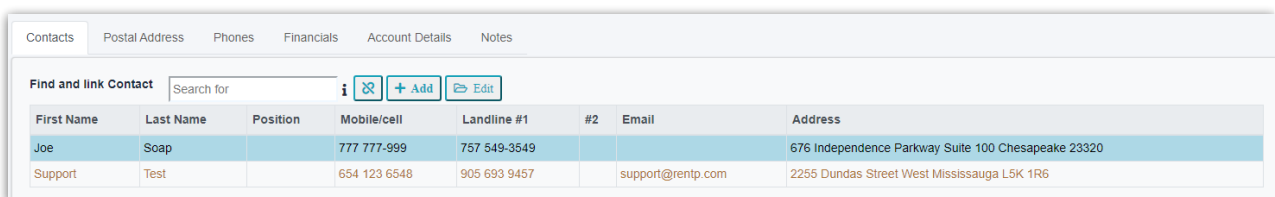


Once located, use  to add the contact to the list of contacts for this customer OR  to clear the search (Fig 1.3 below)



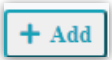
If added, the contact will appear on the grid (Fig 1.4 below)

Fig 1.4





Unlink or remove a contact from the list associated with this customer



Add a new contact to the database and link it to this customer



Edit an existing contact associated with this customer

Postal Address


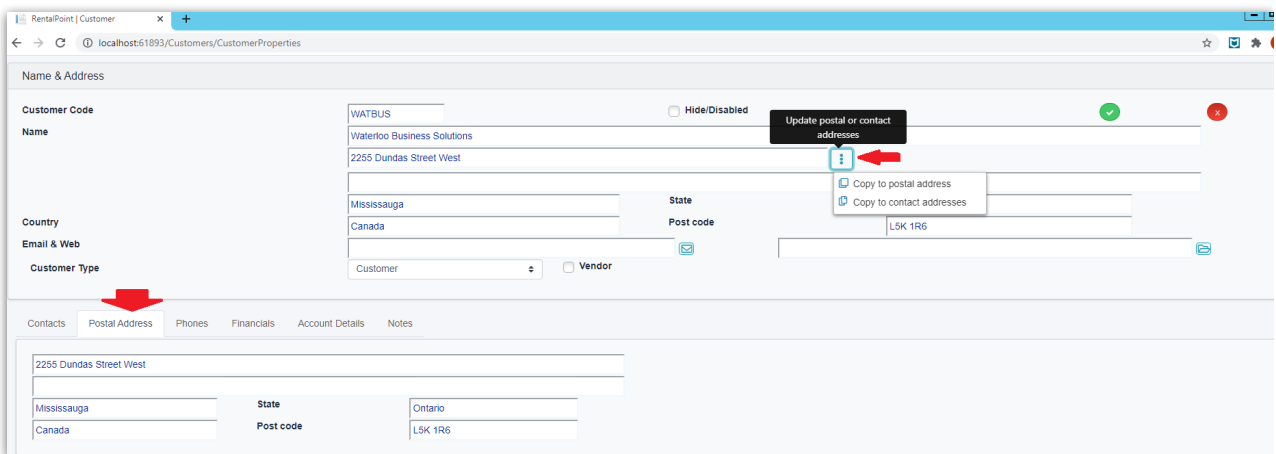
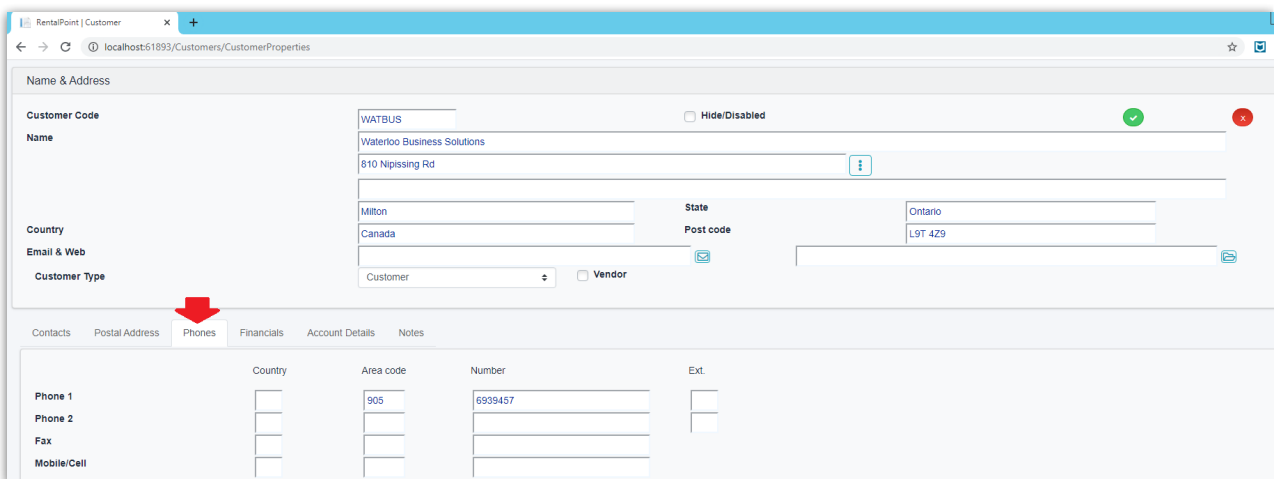
Within the Customer Record, use  icon (see Fig 1.1 below) to copy the company address to postal and/or contact address fields.

Fig 1.1



Phone Numbers

Within the Customer Record, use the Phones tab to store multiple contact phone options. These numbers can also be printed on output documentation like quotes, invoices, delivery sheets etc.

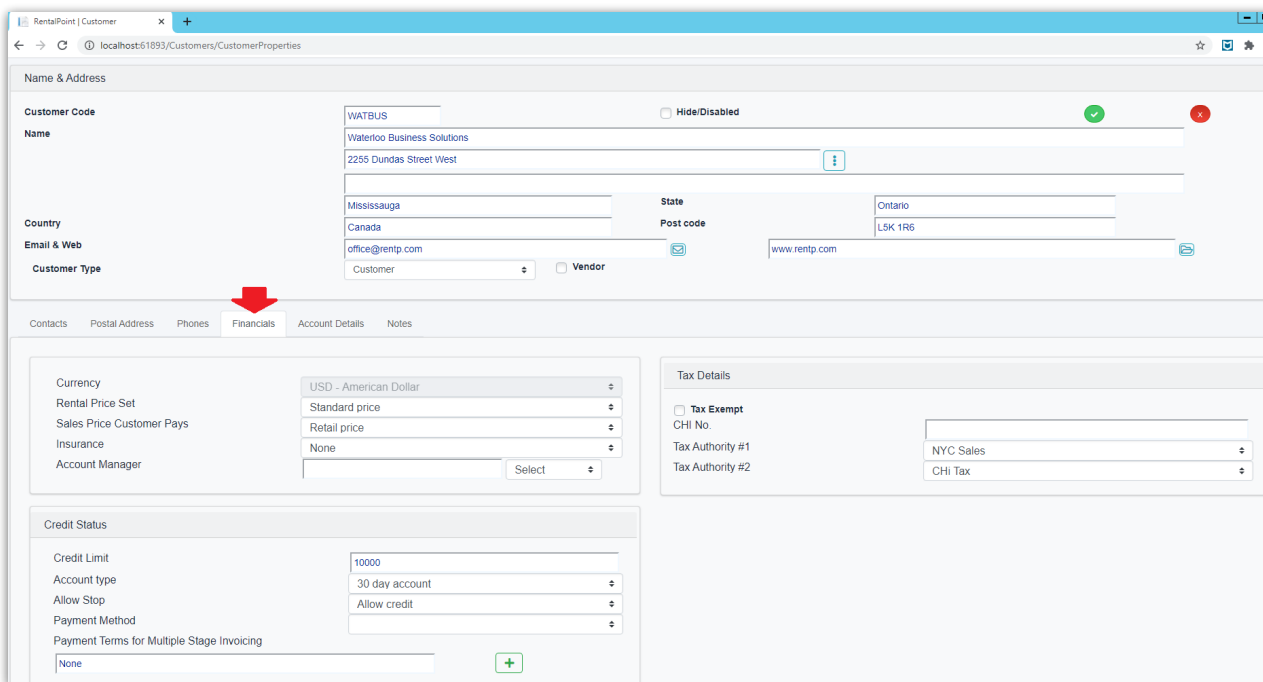


Financials

Access to financials can be limited via operator privileges. This tab contains information on the financial status of the customer, the price scheme the customer is on, insurance, taxes etc. Financial operations (i.e. statement printing etc) are performed via the Financials menu option outside the customer record.

Use the  if needed to **set up default stages** for multiple stage invoicing (Fig 1.1 below)

Fig 1.1



Account Details

Record the email address of the person to whom invoices and statements should be sent to in Account Receivable 'AR Email Address'.

RentalPoint will maintain payment figures and last payment details based on invoices and payments processed in the system. These information can be used to narrow the scope for Statement production and financial reports.

The screenshot shows the 'Customer Properties' form for 'WATBUS'. The 'Name & Address' section includes fields for Customer Code, Name, Address, Country, State, Post code, Email & Web, and Customer Type. The 'Account Details' section shows a table of payment terms and a summary of payments.

Account Details	Value	Payments MTD	Value
AR Email address	office.rentalpoint@gmail.com	Current	0
		30 Days	0
		60 Days	0
		90 Days	0
		Total Due	0
		Payments MTD	0
		Last payment date	07/05/2019
		Last Payment amount	5

Notes

Within the Customer Record, maintain customer notes from the notes tab. Notes can be stamped with date and time of entry and included on customer reports/queries as needed.

The screenshot shows the 'Notes' tab selected in the 'Customer Properties' form. A red arrow points to the 'Notes' tab. A note has been added with the timestamp 'Tue Jul 21 2020 15:07:13 GMT-0400 (Eastern Daylight Time)'. At the bottom, there are 'Stamp' and 'Save' buttons.

Purge Credit Card and other Custom Details

Permanently Remove Credit Card and/or custom field details from:

- Bookings within the scope selected
- Customer/Vendor Records
- Contact Records

Bookings Control panel

Custom ▾ 2023-01-01 2023-06-12 3001 Booking No. ▾

Booking	Organization	Time	In	Date	Time	Confirmed Status
300100023	Inhouse Systems	0800	Fri	2023/04/07	1800	Confirmed
300100025	Inhouse Systems	0800	Fri	2023/04/07	1800	Confirmed
300100030	Inhouse Systems	0800	Fri	2023/04/21	1800	Confirmed
300100024	Inhouse Systems	0800	Fri	2023/04/21	1800	Confirmed
300100026	Inhouse Systems	0800	Wed	2023/04/19	1800	Confirmed
300100027	Inhouse Systems	0800	Wed		1800	Confirmed
300100028	Inhouse Systems	0800	Fri	2023/04/21	1800	Confirmed

- Lock Booking
- UnLock Booking
- Lock/Unlock for Scanning in Checkout
- Cancel Booking
- Delete Booking
- Duplicate Booking
- Archive this Booking
- UnArchive Booking
- Purge Credit card details

- Expand/Collapse each section via the blue arrow icon
- Only fields selected and within the date range will be purged

Field to clear

Booking fields ▾

Apply to bookings with return date before: 2023-03-13

CREDIT CARD DETAILS

Customer/Vendor fields ▾

Contact fields ▾

Apply to contacts with last update before: 2023-03-13

CREDIT CARD DETAILS

- Drivers License No.
- Cell
- Field Test 1
- Field Test 2
- Field Test 3
- Field Test 4
- Field Test 5
- Field Test 6
- Date Field 1
- Date Field 2

! WARNING ! this action cannot be undone,
type YES to confirm purge of fields

YES

- Data\logs\PurgeLog.txt

```
PurgeLog.txt - Notepad
File Edit Format View Help
2:12:12 PM May 12, 2023 Contact credit card details last update before 23/03/13 cleared by (RP)
2:12:12 PM May 12, 2023 The following contact custom fields last update before 23/03/13 were cleared by (RP)Field Test 1,
```
