

Card File Control Panel

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Customer/Vendor account maintenance and financials

Bookings

Shortages

Card file

Products

Venues

Card file Control panel

Current

search text

Code	Contact	Company Name	Phone 1	Email	Address
MYTEST	Support Test	MYTEST	gg 905 693 9457	support@rentp.com	mytest 810 Nipissing Road Milton Ontario L9T 4Z9 Canada

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

Name & Address

Customer Code

AGET

☐ Hide/Disabled

Name

TECH AGENCY 1009

Address

345444

Country

State

Email

Zip Code

Customer Type

Customer

☒ Vendor

Web

Contacts

Postal Address

Phones

Notes

Financials

Account Details

Others

Find and link Contact

Search for

+ Add

Edit

First Name	Last Name	Position	Mobile/cell	Landline #1	#2	Email	Address
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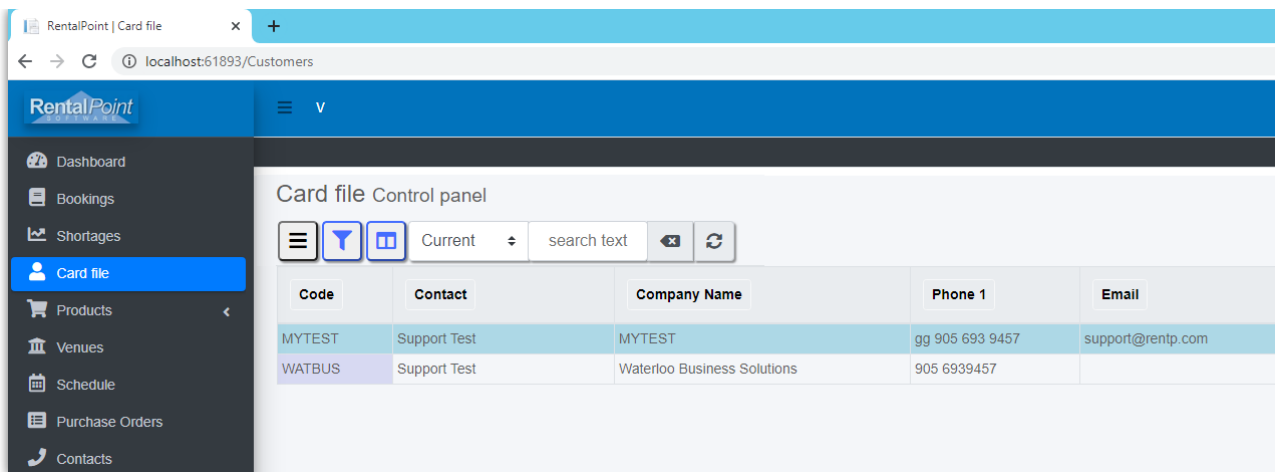
Customer Contact

Payment Contact

☐ Customer Contact

☐ Payment Contact

Fig 1.1




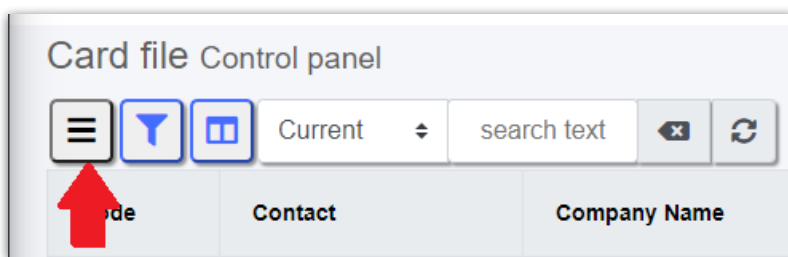
Use the  icon OR right click on the card file grid to access the menu options (Fig 1.2 below)

Fig 1.2




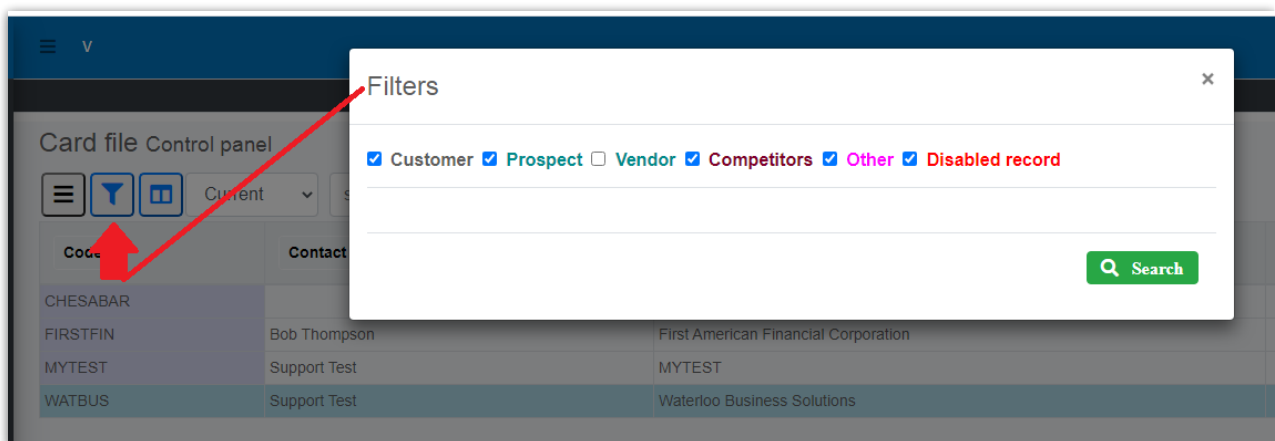
Use the  icon (fig 1.3 below) to control the types of record that show up on the grid (Fig 1.3 below)

Fig 1.3




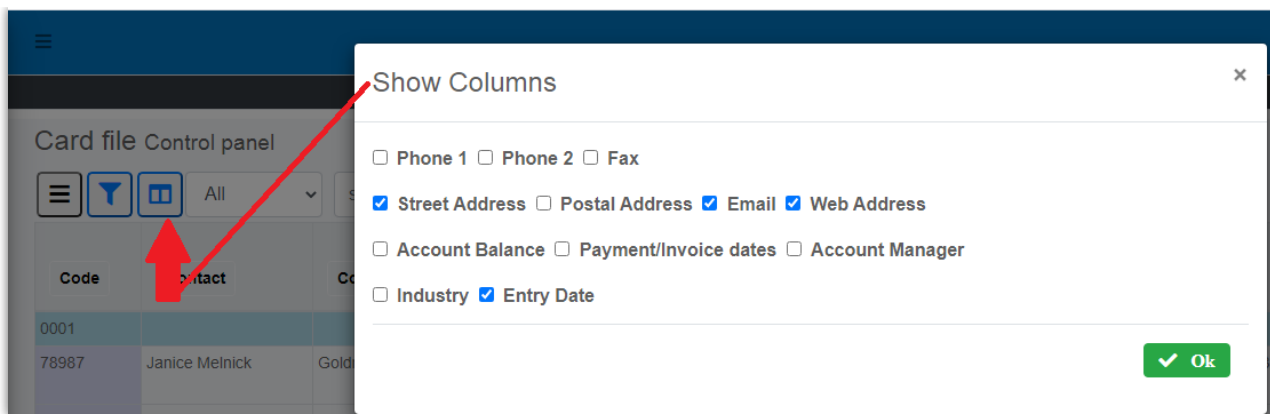
Use the  icon (see fig 1.4 below) to select the information that will display on the grid for each customer record (Fig 1.4 below)

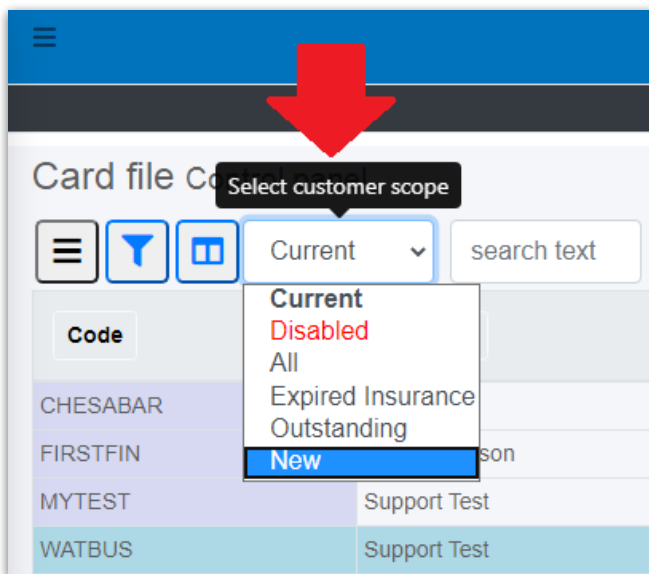
Fig 1.4



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 310 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


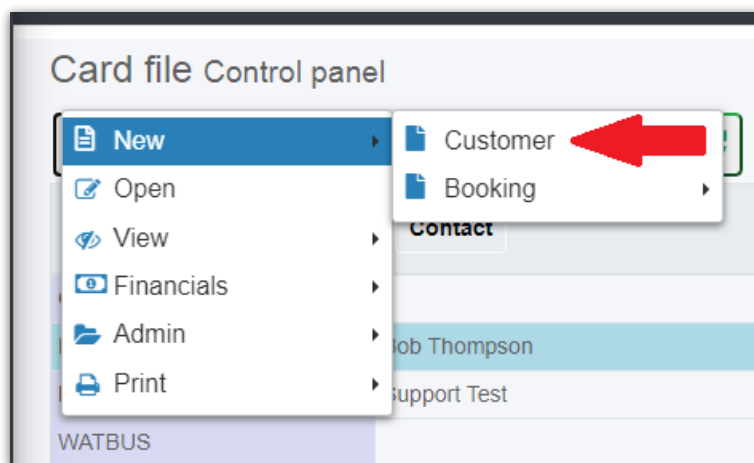
From the **Customer Grid**, set up a new customer using the  **New** customer menu option (see fig 1.1 below)

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

Complete setup of customer information under additional tabs

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
Name: TECH AGENCY 1009
Address: 345444
Country:
State:
Zip Cod:
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

Name & Address


Customer Code: WATBUS ☐ Hide/Disabled


Name: Waterloo Business Solutions

Address: 2255 Dundas Street West, 





Country: Mississauga State: Ontario

Canada Post Code: L5K 1R6

Email: 

Customer Type: Customer ☐ Vendor Web: 

Contacts Postal Address Phones Notes Fields Financials Account Details Others Insurance Attachments

Find and link Contact Search for    

First Name	Last Name	Position	Mobile/cell	Landline #1	#2	Email	Address
Teresa	Agozzino						
Walter	O'Reilly		d d				

Customer Contact: Walter O'Reilly ☒ Customer Contact

Payment Contact: Teresa Agozzino ☐ Payment Contact

Default Booking Contact: Walter O'Reilly ☒ Default Booking Contact





Default Booking Contact:

- If a customer is selected for a booking that does not already have a default booking contact, the customer contact will be added as the booking contact instead
- If the customer default booking contact is blank, it needs to be set in Customer Properties by the user in order to be used in bookings
- The 'Booking Contact' field in each booking will be set to the Customer Default Booking Contact when a booking is saved ONLY IF the booking contact is left blank by the user.



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






Fig 1.2

Contacts Postal Address Phones **Details** Notes

Find and link Contact Search for    

Search on name, address, email address, mobile/cell number, then press <tab>





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

Find and link Contact 1 - Joe Soap 777-999 E: C     

Add contact to list

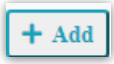
If added, the contact will appear on the grid (Fig 1.4 below)

Fig 1.4

Contacts							
Postal Address							
Phones							
Financials							
Account Details							
Notes							
Find and link Contact <input type="text" value="Search for"/>    							
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



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


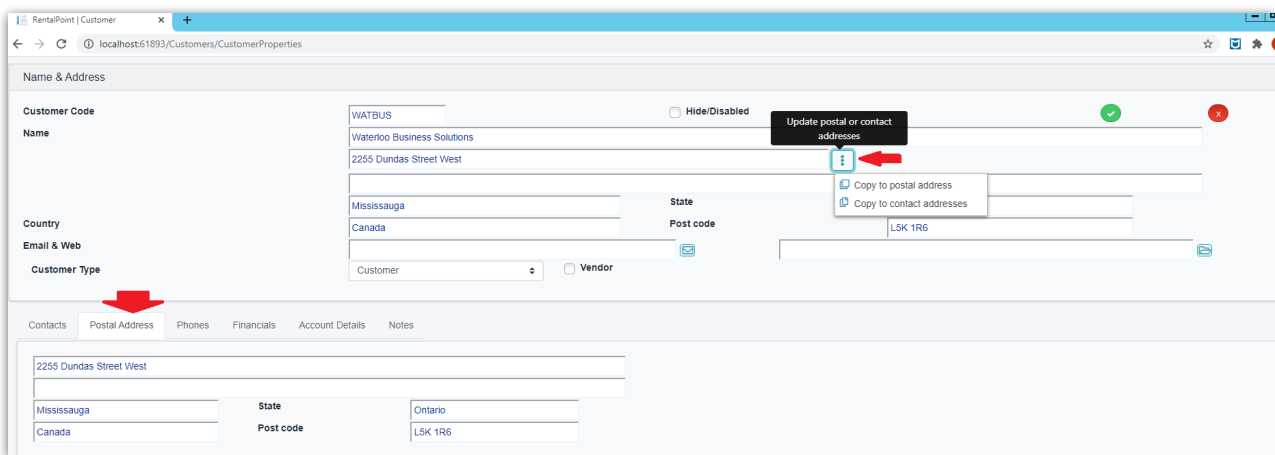
Within the Customer Record, use  icon (see Fig 1.1 below) to copy the company address to postal and/or contact address fields.

Fig 1.1



The screenshot shows the 'RentalPoint | Customer' interface. The 'Name & Address' section contains fields for Customer Code (WATBUS), Name (Waterloo Business Solutions), Address (2255 Dundas Street West), City (Mississauga), State, Post code (L5K 1R6), Country (Canada), Email & Web, and Customer Type (Customer). A red arrow points to the 'Update postal or contact addresses' button. Another red arrow points to the 'Copy to postal address' and 'Copy to contact addresses' options in the dropdown menu. The 'Postal Address' tab is selected, showing the address details.

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.

Customer Code: WATBUS ☐ Hide/Disabled ✓ ✗

Name: Waterloo Business Solutions
810 Nipissing Rd

Country: Milton, Canada
State: Ontario
Post code: L9T 4Z9

Email & Web:
Customer Type: Customer ☐ Vendor

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

	Country	Area code	Number	Ext.
Phone 1	<input type="text"/>	905	6939457	<input type="text"/>
Phone 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fax	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mobile/Cell	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Customer Code: WATBUS ☐ Hide/Disabled ✓ ✗

Name: Waterloo Business Solutions
2255 Dundas Street West

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

Email & Web: office@rentp.com, www.rentp.com
Customer Type: Customer ☐ Vendor

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

Currency: USD - American Dollar

Rental Price Set: Standard price

Sales Price Customer Pays: Retail price

Insurance: None

Account Manager: Select

Tax Details

☐ Tax Exempt

CHI No.

Tax Authority #1: NYC Sales

Tax Authority #2: CHI Tax


Credit Status

Credit Limit: 10000

Account type: 30 day account

Allow Stop: Allow credit

Payment Method:

Payment Terms for Multiple Stage Invoicing: None 

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. This information can be used to narrow the scope for Statement production and financial reports.

The screenshot shows the 'RentalPoint | Customer' interface with the 'Account Details' tab selected. The 'Name & Address' section contains the following information:

- Customer Code: WATBUS (with a 'Hide/Disabled' checkbox and a green checkmark)
- Name: Waterloo Business Solutions
- Address: 2255 Dundas Street West
- Country: Mississauga
- State: Ontario
- Post code: L5K 1R6
- Email & Web: office@rentp.com, www.rentp.com
- Customer Type: Customer (with a dropdown arrow and a 'Vendor' checkbox)

The 'AR Email address' is set to office.rentpoint@gmail.com. Below this, a table shows payment details:

	Current	Payments MTD
30 Days	0	0
60 Days	0	0
90 Days	0	0
Total Due	0	0

Additional payment details on the right:

- 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 'RentalPoint | Customer' interface with the 'Notes' tab selected. A red arrow points to the 'Notes' tab in the navigation bar. The main area displays a timestamp: 'Tue Jul 21 2020 15:07:13 GMT-0400 (Eastern Daylight Time)'. At the bottom, there is a 'Stamp' button and a 'Save' button.

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. [Refresh]

New Open View Work Admin Financials Print Others

Booking	Organization	Time	In	Date	Time	Confirmed Status
300100023	Inhouse Systems					Confirmed
300100025	Inhouse Systems					Confirmed
300100030	Inhouse Systems					Confirmed
300100024	Inhouse Systems					Confirmed
300100026	Inhouse Systems					Confirmed
300100027	Inhouse Systems					Confirmed
300100028	Inhouse Systems					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 [X]

Booking fields [v] [2023-03-13]

☒ CREDIT CARD DETAILS

Customer/Vendor fields [v] [2023-03-13]

Contact fields [v] [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

[✓] [X]

- Data\logs\Purgelog.txt

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