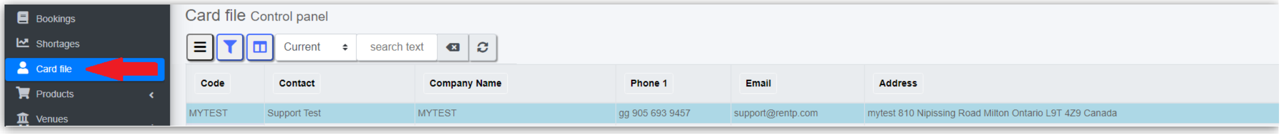
Card File Control Panel

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

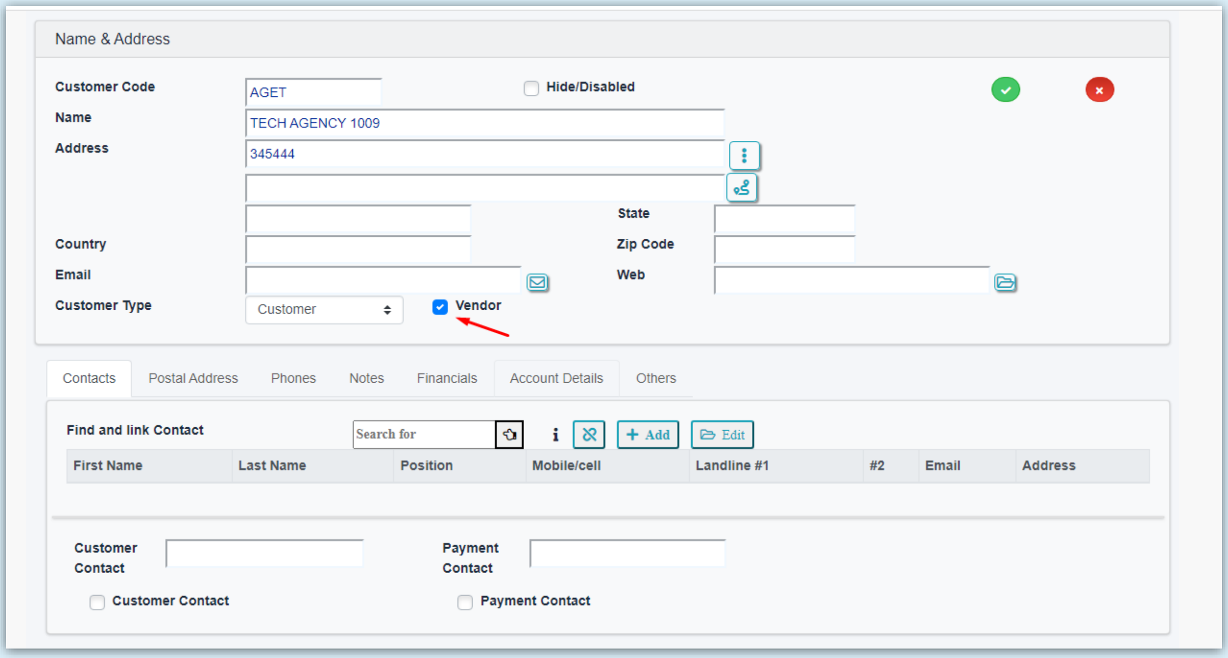
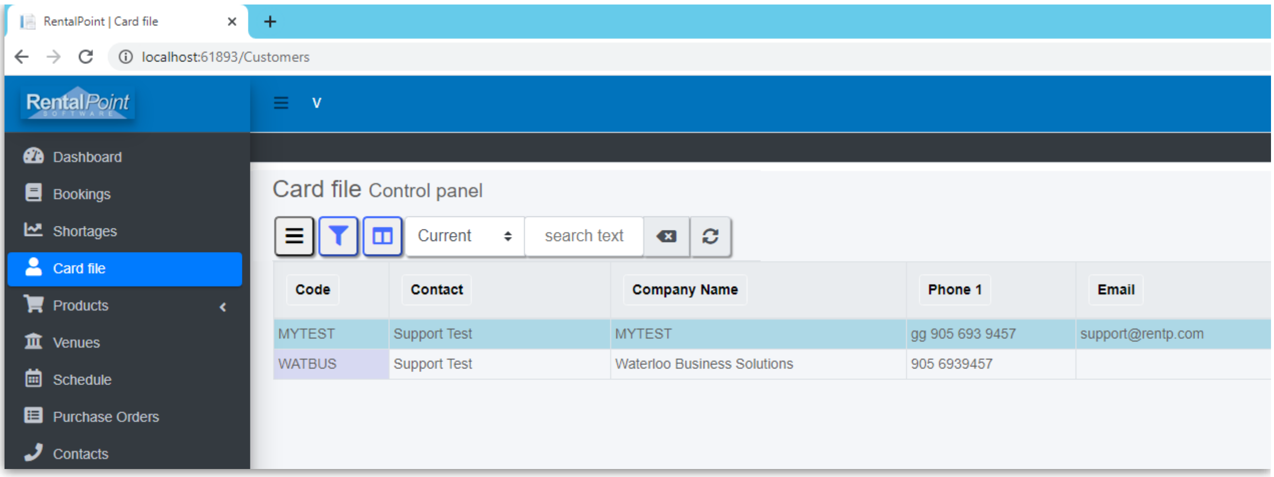
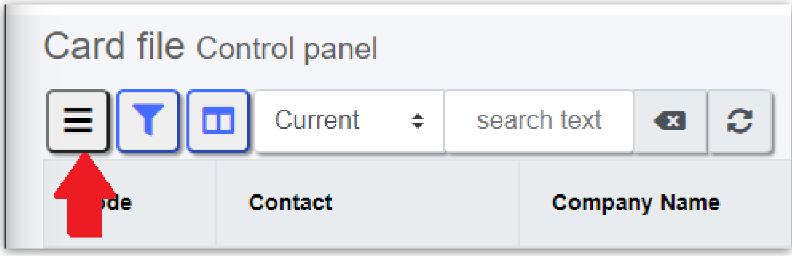


Fig 1.1



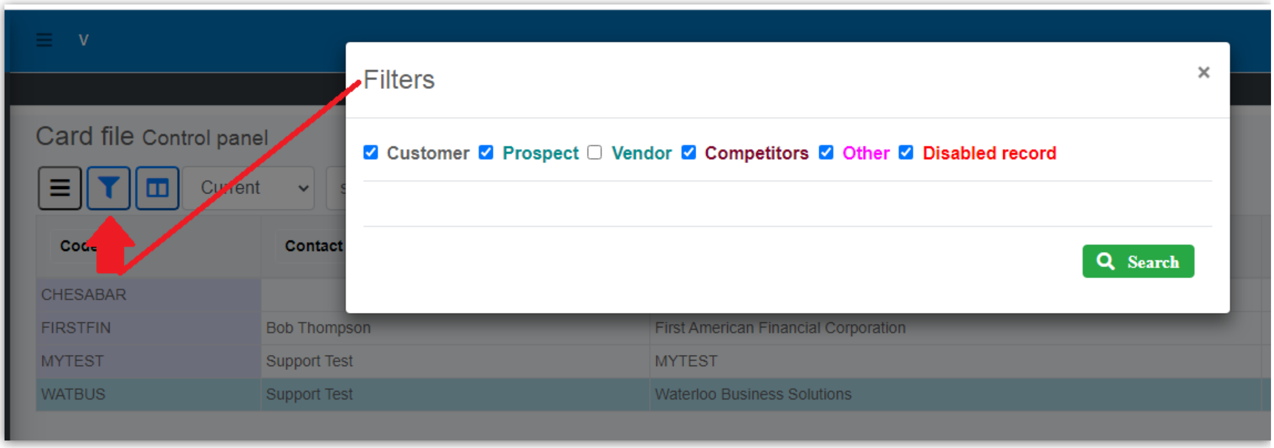
Use the  icon OR right click on the card file grid to access the menu options (Fig 1.2 below)

Fig 1.2



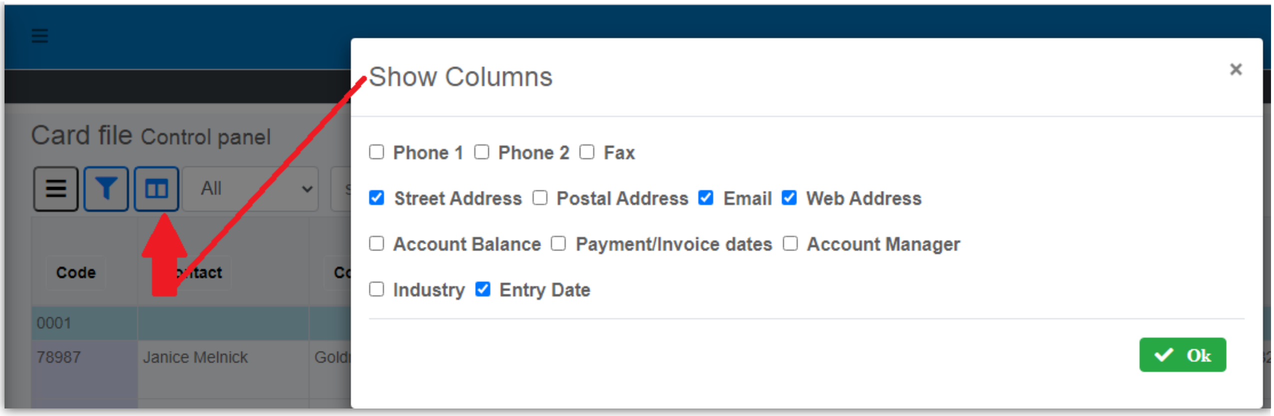
Use the  icon (fig 1.3 below) to control the types of record that show up on the grid (Fig 1.3 below)

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)

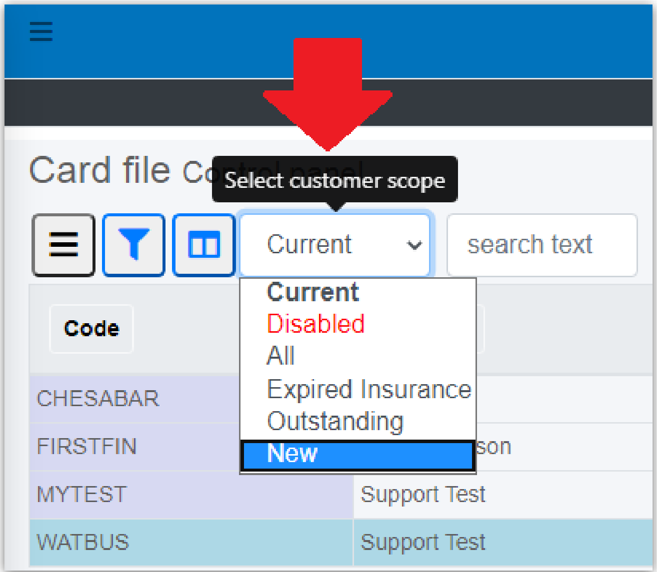
Fig 1.4



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

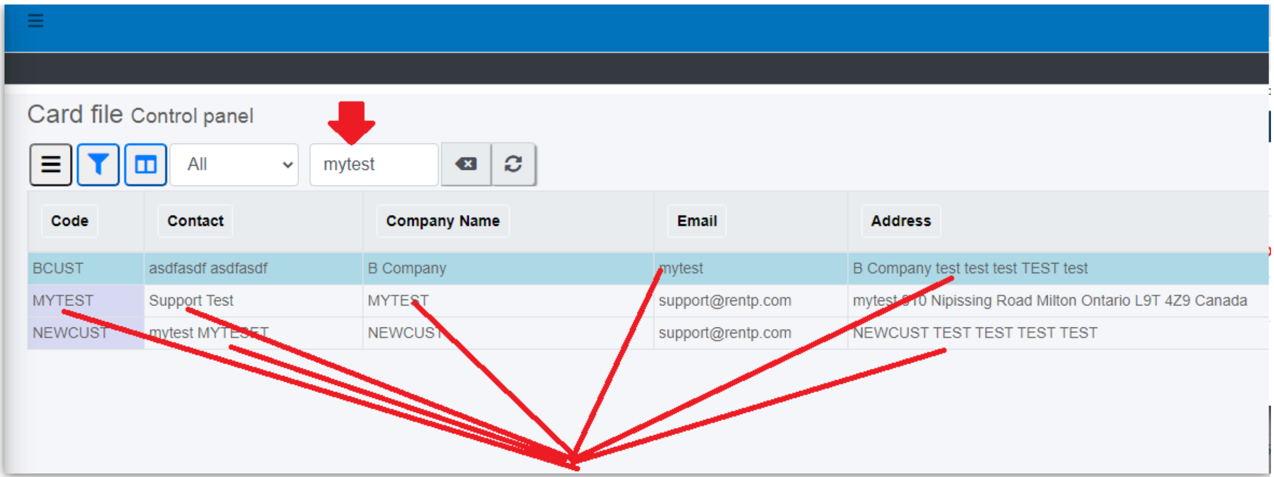
- Current = display active customers only
- Disabled = display disabled customer only
- All = display all customer records
- Expired Insurance = display only those records with expired insurance
- Outstanding = display only those records with an outstanding balance
- New = display new customers only

Fig 1.5

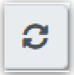


Search text (Fig 1.6) will search multiple fields for the text entered, all records that contain the search criteria will be returned to the grid (delete the search text to reset to unlimited search)

Fig 1.6



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

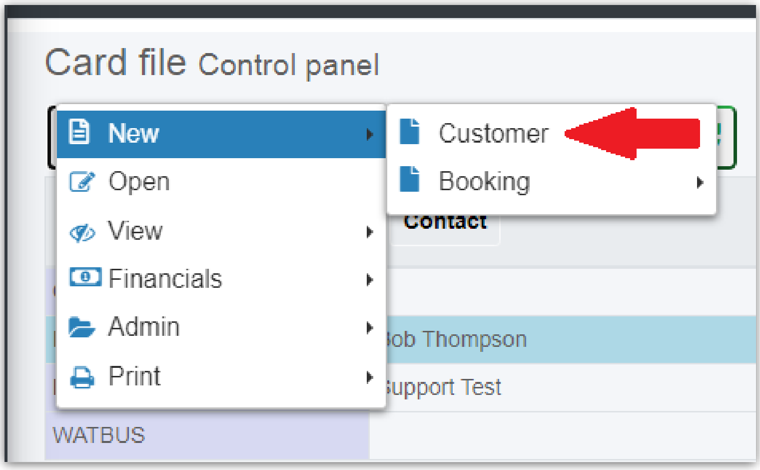
Use the  icon to refresh the grid (Fig 1.6 above)

New Customer/Vendor

From the Customer Grid, set up a new customer using the 

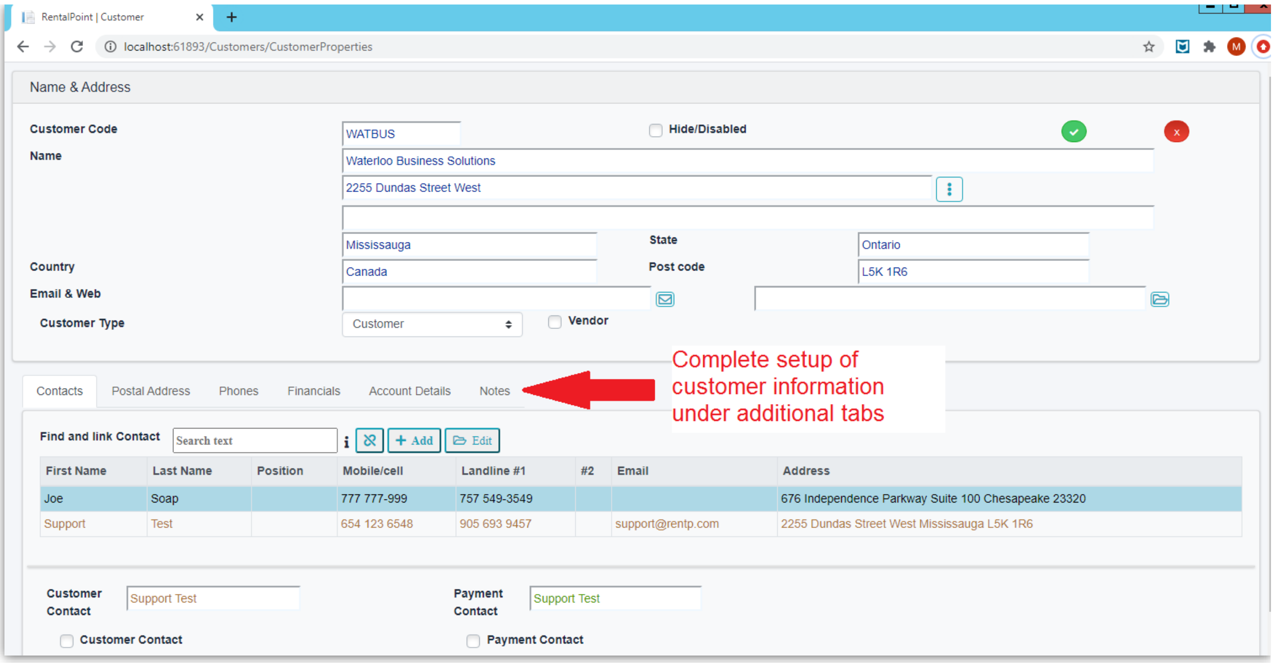
customer menu option (see fig 1.1 below)

Fig 1.1



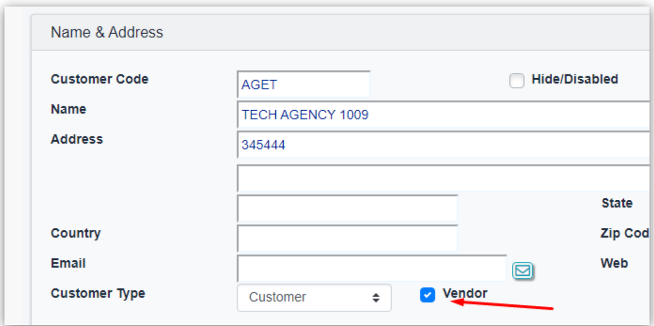
Once you've entered the customer name and address, click through the additional tabs at the bottom of the form to complete customer setup (see Fig 1.2 below).

Fig 1.2

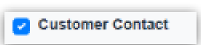


Customer/Vendor Contacts

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.



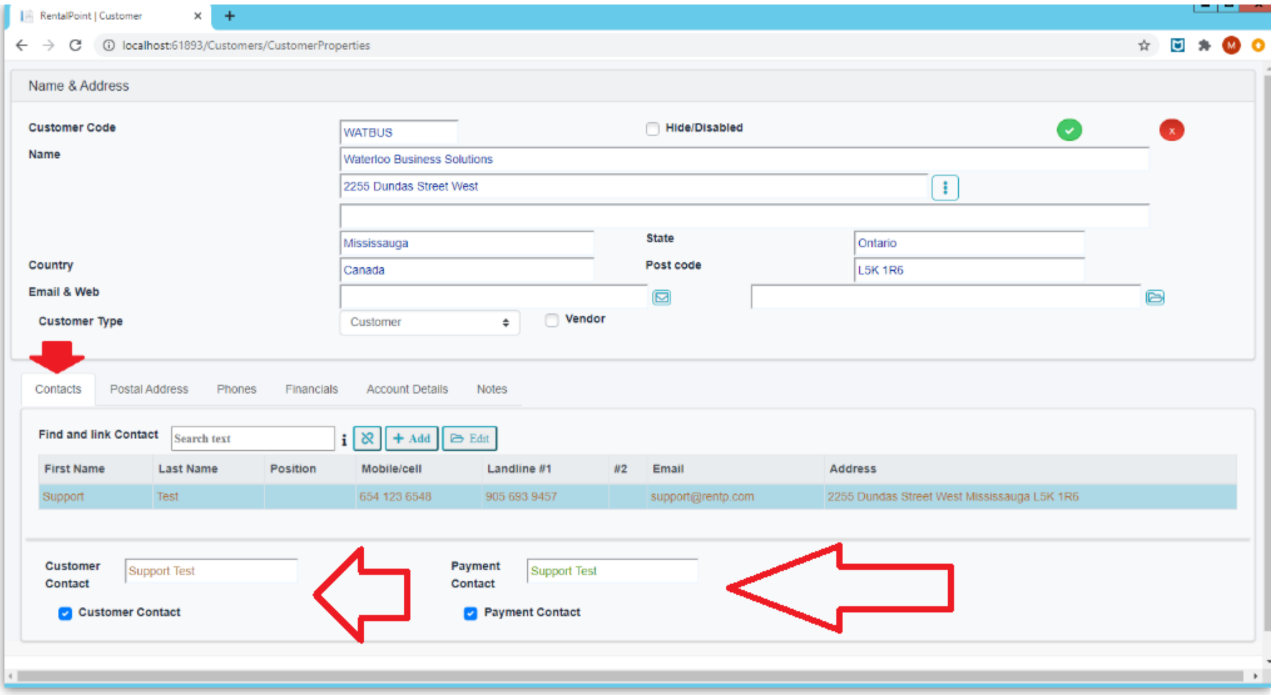
Within the Customer Record, maintain a list of associated contacts. The contact need only be set up in the database once and can then be linked with many customers/vendors if needed. New contacts can be added from within a customer record and/or existing contacts can be linked to the customer as outlined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

Use the 

and 

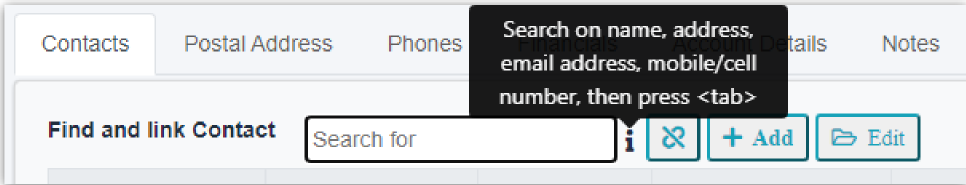
checkboxes (Fig 1.1 below) against any contact record to identify the contact associated with that role in the company

Fig 1.1

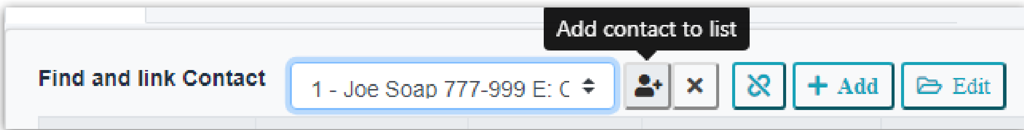


Use the options in Fig 1.2 below to search for an existing contact record to link to this customer.

Fig 1.2

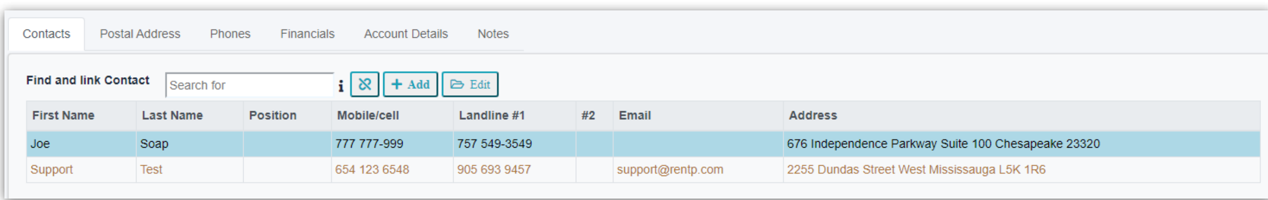


Once located, use  to add the contact to the list of contacts for this customer OR  to clear the search (Fig 1.3 below)

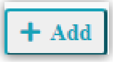


If added, the contact will appear on the grid (Fig 1.4 below)

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

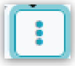
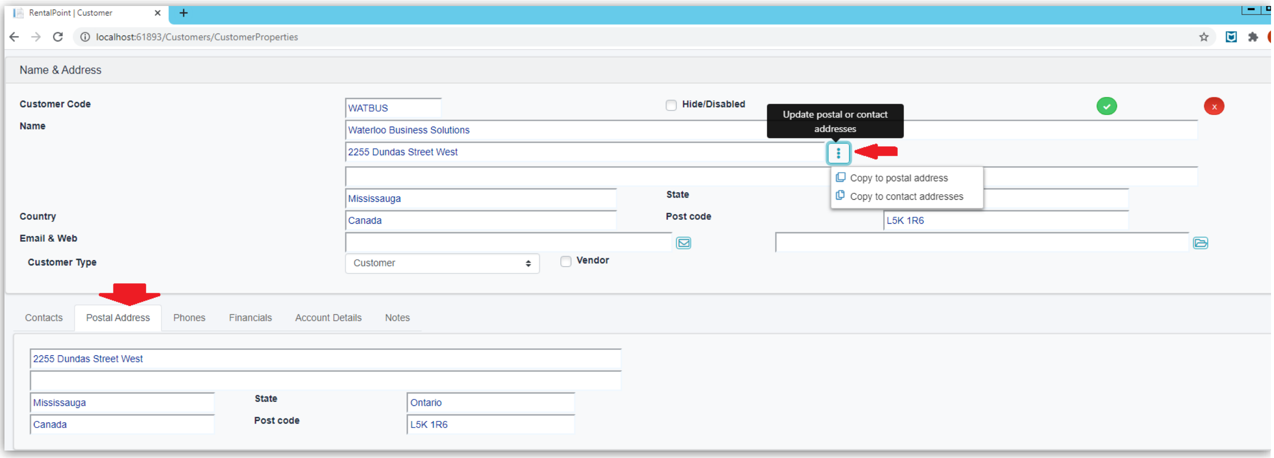
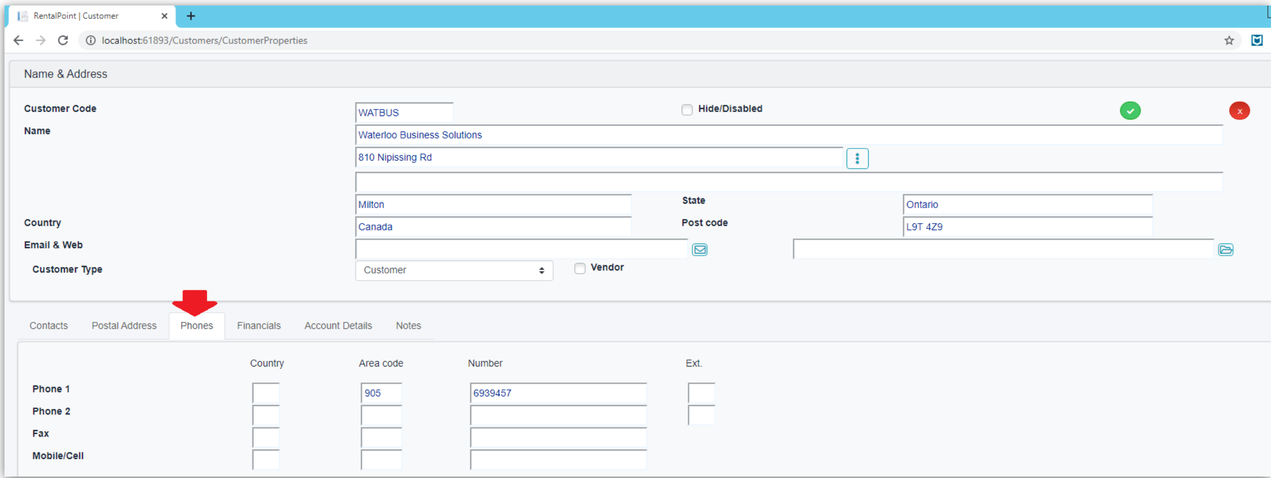
Within the Customer Record, use  icon (see Fig 1.1 below) to copy the company address to postal and/or contact address fields.

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.

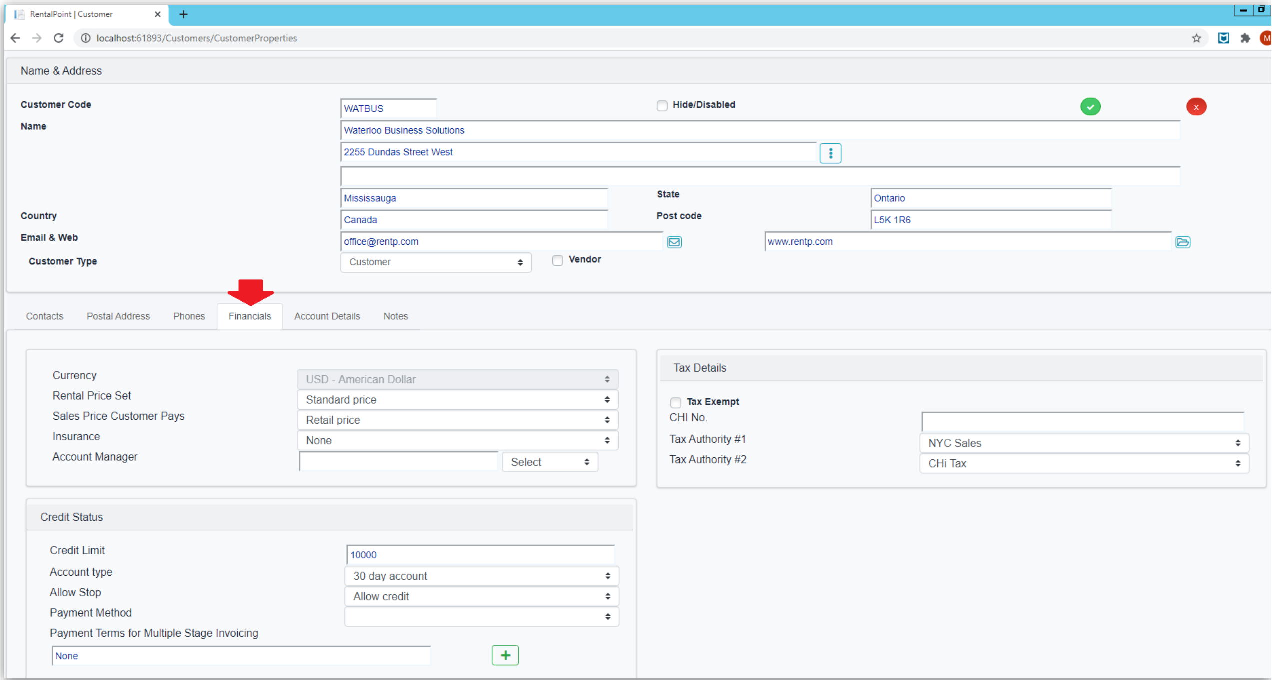


Financials

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)

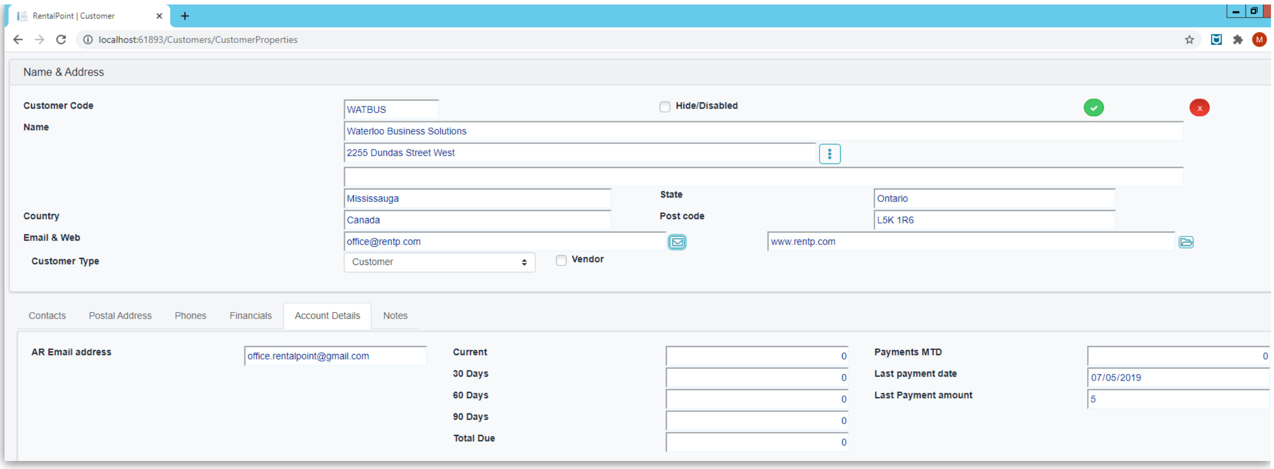
Fig 1.1



Account Details

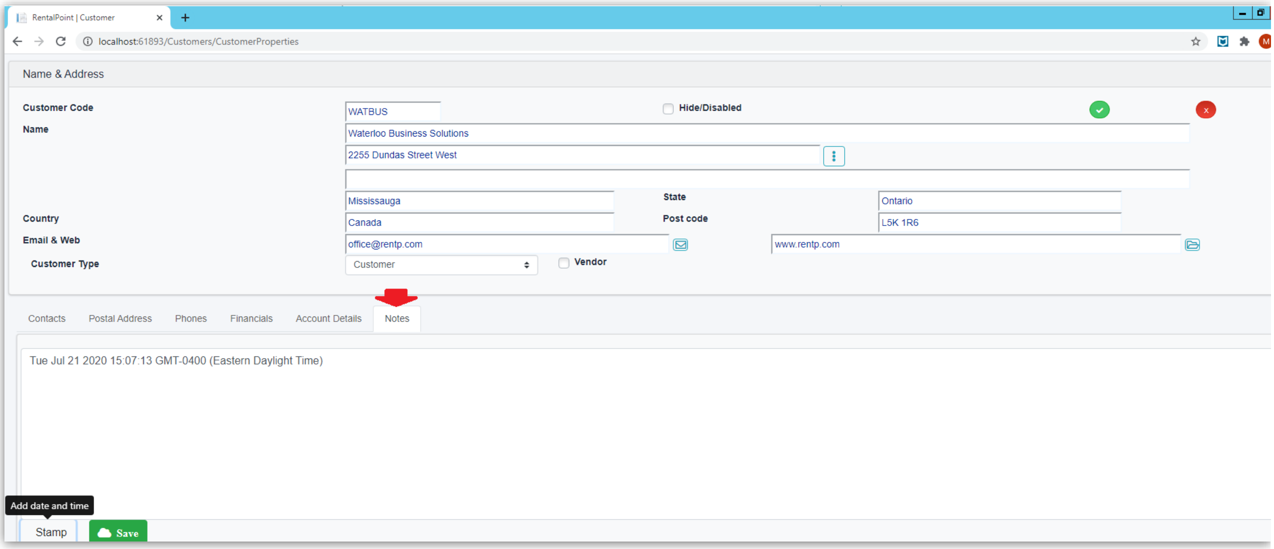
Record the email address of the person to whom invoices and statements should be sent to in Account Receivable 'AR Email Address'.

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.



Notes

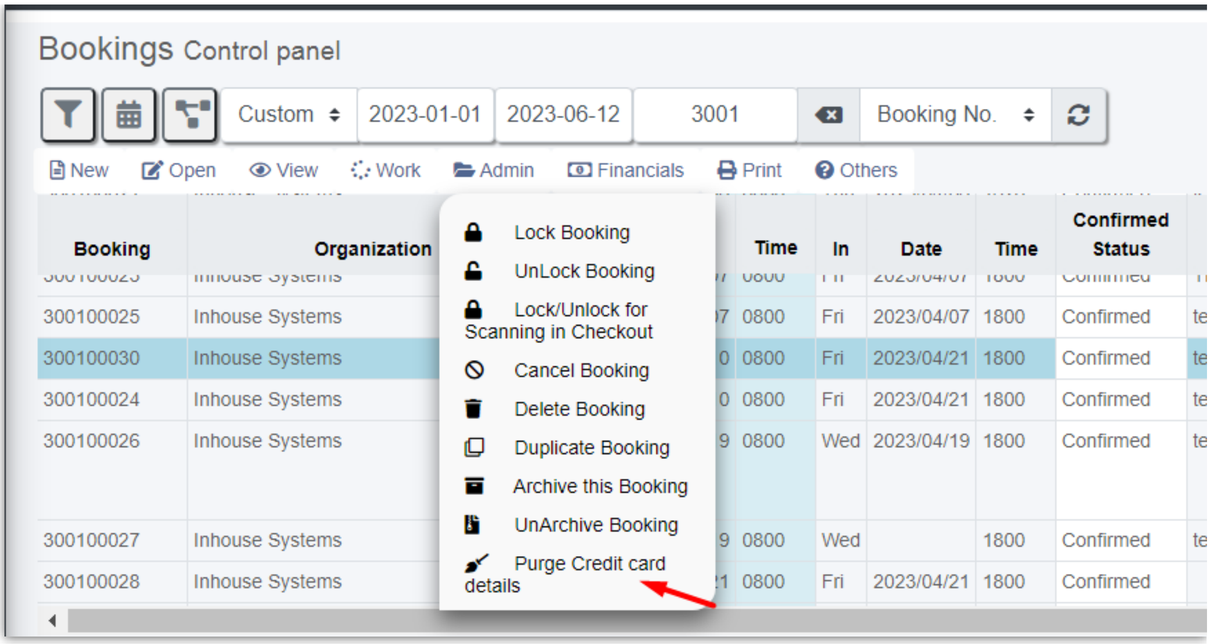
Within the Customer Record, maintain customer notes from the notes tab. Notes can be stamped with date and time of entry and included on customer reports/queries as needed.



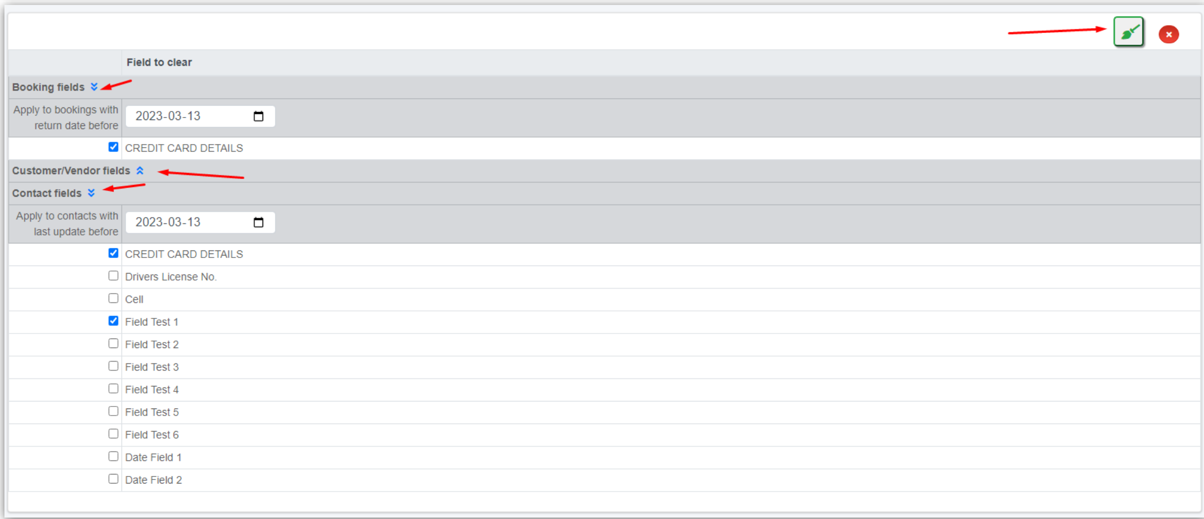
Purge Credit Card and other Custom Details

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

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



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



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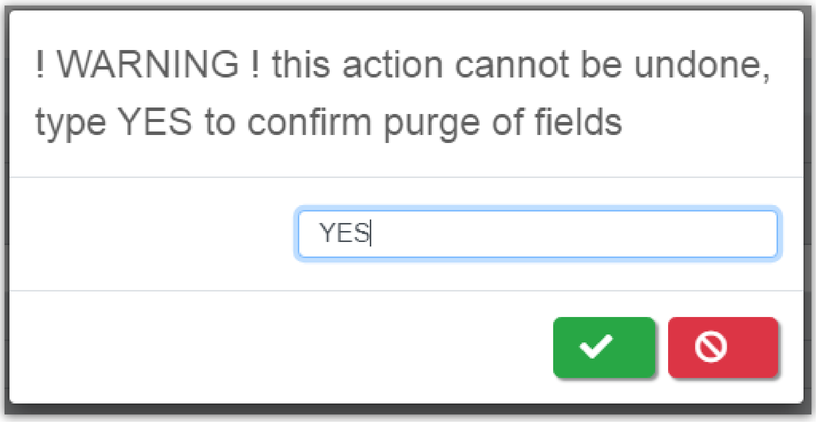

- Data\logs\Purgelog.txt
-

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,
```