

# Customer/Vendor Grid

Last Modified on 24/06/2022 12:09 pm EDT

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: [ ]

Web: [ ]

Customer Type: Customer  Vendor

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

Find and link Contact: Search for [ ]

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

Customer Contact: [ ]  Customer Contact

Payment Contact: [ ]  Payment Contact

Fig 1.1

RentalPoint | Card file

localhost:61893/Customers

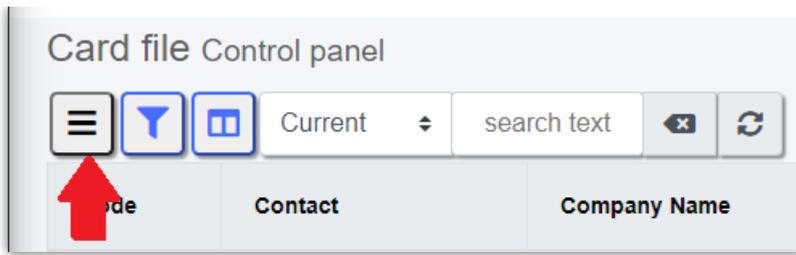
Card file Control panel

Current search text

Code	Contact	Company Name	Phone 1	Email
MYTEST	Support Test	MYTEST	gg 905 693 9457	support@rentp.com
WATBUS	Support Test	Waterloo Business Solutions	905 6939457	

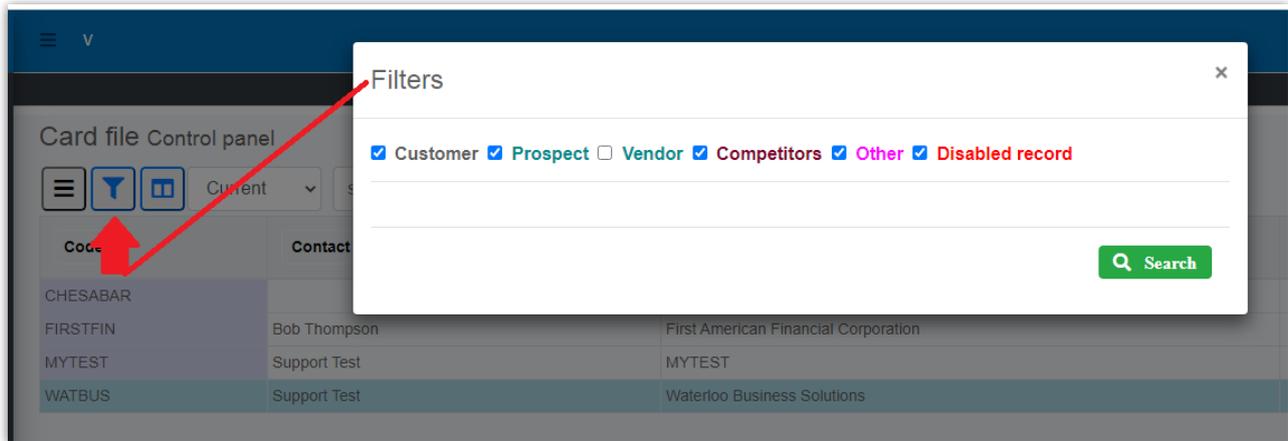
Use the  icon OR right click on the card file grid to access the menu options (Fig 1.2 below)

Fig 1.2



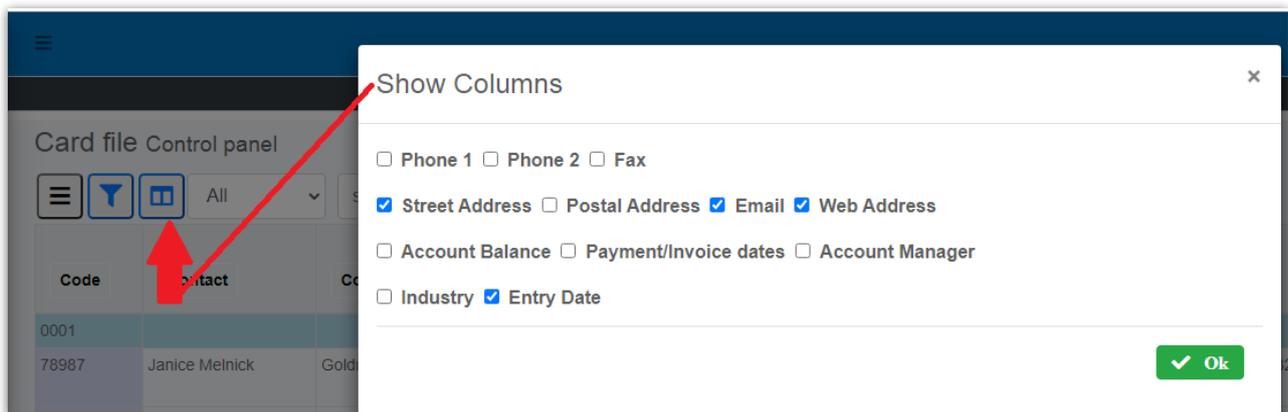
Use the  icon (fig 1.3 below) to control the types of record that show up on the grid (Fig 1.3 below)

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

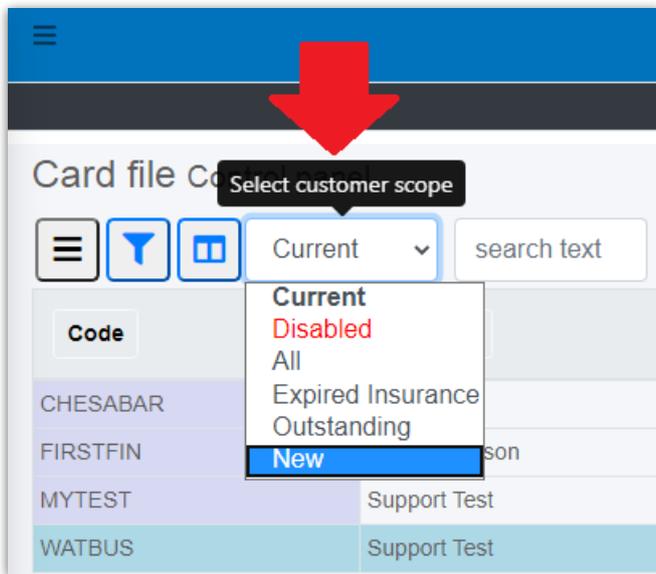


Select the scope of the display from the drop down menu (Fig 1.5 below)

- Current = display active customers only
- Disabled = display disabled customer only
- All = display all customer records

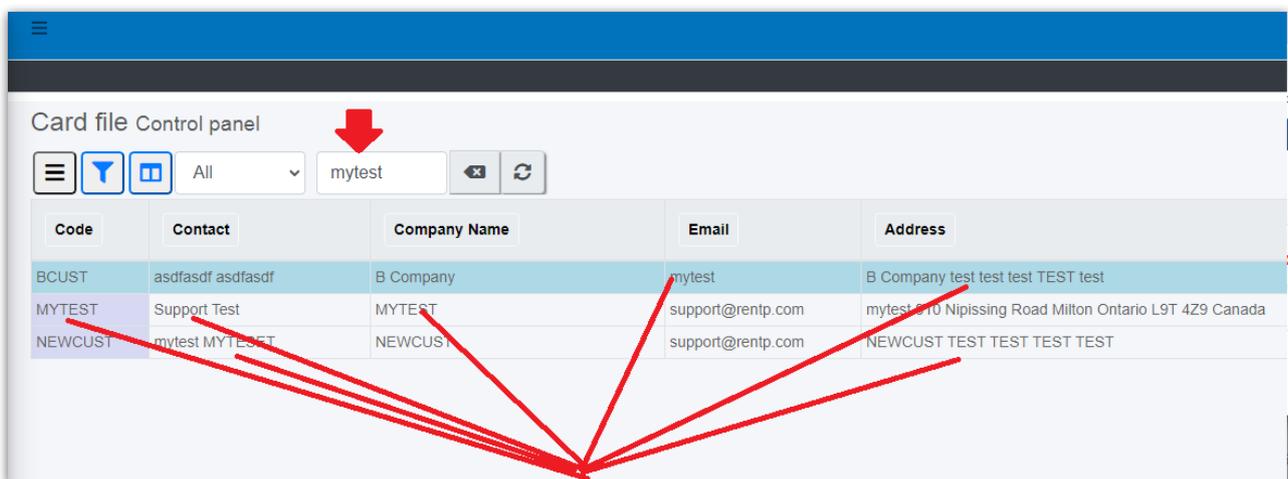
- Expired Insurance = display only those records with expired insurance
- Outstanding = display only those records with an outstanding balance
- New = display new customers only

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)