## 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

	AGET		Hide/Disabl	ed			
Name	TECH AGENCY	1009					
Address	345444			:			
				<u></u>			
			:	State			
Country			2	(ip Code			
Email				Veb			
Customer Type	Customer	🗢 🔽 Vendor					
	fress Phones	Notes Financials	Account Details	Others			
Find and link Contact		Search for	∿ i 🕅	+ Add 🗁 Edit			
Find and link Contact First Name	Last Name	Search for Position	1 R	+ Add 🖻 Edit Landline #1	#2	Email 4	Address
Find and link Contact First Name Customer	Last Name	Search for restion	★ i ⊗ ( Mobile/cell	+ Add Edit Landline #1	#2	Email A	Address
Find and link Contact First Name Customer Contact	Last Name	Search for Position	1 X ( Mobile/cell	+ Add Edit Landline #1	#2	Email 4	Address

## Fig 1.1

RentalPoint   Card file x +							
← → C ① localhost:61893/Customers							
Rental Point	≡ v						
Dashboard							
E Bookings	Card file C	ontrol panel					
🗠 Shortages	E Current + search text 🛛 🕫						
Card file							
Troducts <	Code	Contact	Company Name	Phone 1	Email		
🏛 Venues	MYTEST	Support Test	MYTEST	gg 905 693 9457	support@rentp.com		
💼 Schedule	WATBUS	Support Test	Waterloo Business Solutions	905 6939457			
Purchase Orders							
J Contacts							

Use the

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

Fig 1.2



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

Fig 1.3

≡ v		
	Filters	×
Card file Control	I panel Customer	Prospect  Vendor  Competitors  Other  Disabled record
CHESABAR		
FIRSTFIN	Bob Thompson	First American Financial Corporation
MYTEST	Support Test	MYTEST
WATBUS	Support Test	Waterloo Business Solutions

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

Fig 1.4

=			Show Columns	×
Card file	Control panel	v s	<ul> <li>Phone 1 Phone 2 Fax</li> <li>Street Address Postal Address Email Web Address</li> <li>Account Balance Payment/Invoice dates Account Manager</li> <li>Industry Entry Date</li> </ul>	
0001 78987	Janice Melnick	Goldi	2	✔ Ok

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	+			Í	
	All 🗸	mytest 🛛 🕄				
Code	Contact	Company Name	Email	Address		
BCUST	asdfasdf asdfasdf	B Company	mytest	B Company test test TEST test		
MYTEST	Support Test	MYTEST	support@rentp.com	mytest 810 Nipissing Road Milton Ontario L9T 4Z9 Canada		
NEWCUST	mytest MYTESET	NEWCUST	support@rentp.com	NEWCUST TEST TEST TEST		
Use the icon to clear the search box (Fig 1.6 above)						
Use the conto refresh the grid (Fig 1.6 above)						