

Customer/Vendor Contacts

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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.

Name & Address

Customer Code: AGET ☐ Hide/Disabled

Name: TECH AGENCY 1009

Address: 345444

Country: State:

Email: Zip Code:

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, Canada State: Ontario

Email: Post Code: L5K 1R6

Customer Type: Customer ☐ Vendor

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: ☒ Customer Contact ☐ Payment Contact ☐ 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

The screenshot shows a search bar with the text "Find and link Contact" on the left. To its right is a text input field labeled "Search for". Further right are three buttons: a magnifying glass icon, a "+ Add" button, and an "Edit" button. A black tooltip box is positioned over the search bar area, containing the text: "Search on name, address, email address, mobile/cell number, then press <tab>". Above the search bar are tabs for "Contacts", "Postal Address", "Phones", "Financials", "Account Details", and "Notes".

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

This screenshot shows the search bar after a contact has been found. The text "1 - Joe Soap 777-999 E: C" is now in the "Search for" field. To the right of the field are two new icons: a person icon with a plus sign and a close (X) icon. The "+ Add" and "Edit" buttons remain. A tooltip "Add contact to list" points to the person icon. The tabs at the top are the same as in Fig 1.2.

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

Fig 1.4

The screenshot shows a table of contacts. The search bar from the previous figures is at the top. The table has columns: First Name, Last Name, Position, Mobile/cell, Landline #1, #2, Email, and Address. Two contacts are listed: "Joe Soap" and "Support Test".

| 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