

Customer/Vendor Contacts

Last Modified on 24/06/2022 12:14 pm EDT

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: []

Zip Code: []

Email: [] 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

RentalPoint | Customer

localhost:61093/Customers/CustomerProperties

Name & Address

Customer Code: WATBUS Hide/Disabled

Name: Waterloo Business Solutions

Address: 2255 Dundas Street West

Country: Mississauga State: Ontario

Post code: L5K 1R6

Customer Type: Customer Vendor

Contacts

Find and link Contact

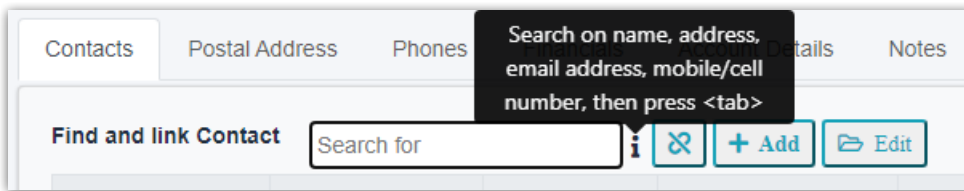
First Name	Last Name	Position	Mobile/cell	Landline #1	#2	Email	Address
Support	Test		654 123 6548	905 683 9457		support@rentp.com	2255 Dundas Street West Mississauga L5K 1R6



Customer Contact: Support Test Customer Contact

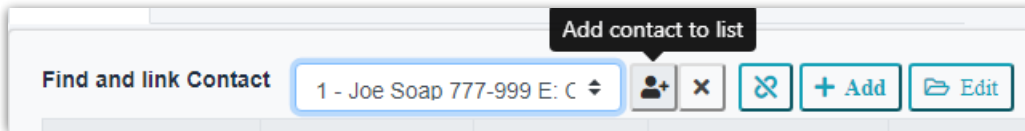
Payment Contact: Support Test Payment Contact

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

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 L6K 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