

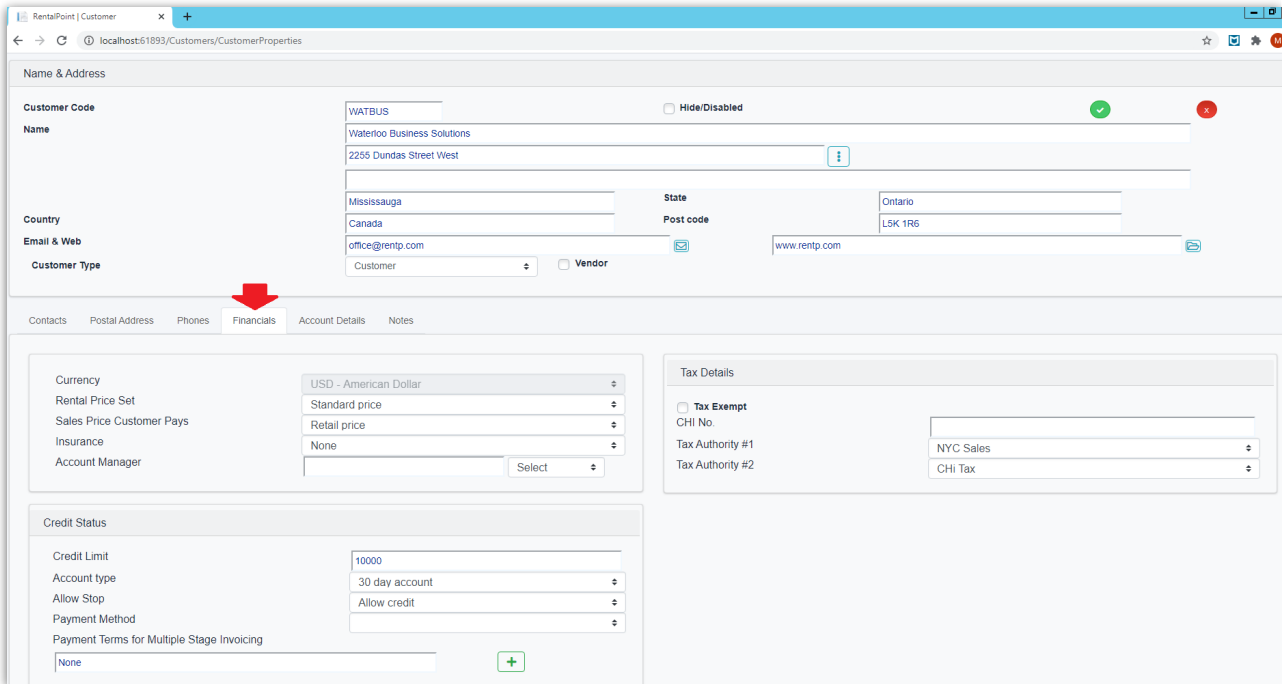
Financials

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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



The screenshot shows the 'Financials' tab of a customer record in RentalPoint. The browser address bar shows 'localhost:61893/Customers/CustomerProperties'. The 'Name & Address' section includes fields for Customer Code (WATBUS), Name (Waterloo Business Solutions), Address (2255 Dundas Street West), Country (Canada), State (Ontario), Post code (L5K 1R6), Email (office@rentip.com), and Customer Type (Customer). A red arrow points to the 'Financials' tab in the navigation bar. The 'Financials' section contains several sub-sections: 'Currency' (USD - American Dollar), 'Rental Price Set' (Standard price), 'Sales Price Customer Pays' (Retail price), 'Insurance' (None), 'Account Manager' (Select), 'Credit Status' (Credit Limit: 10000, Account type: 30 day account, Allow Stop: Allow credit, Payment Method, Payment Terms for Multiple Stage Invoicing: None), and 'Tax Details' (Tax Exempt, CHI No., Tax Authority #1: NYC Sales, Tax Authority #2: CHI Tax). A green plus icon is visible in the bottom right of the 'Payment Terms' field.