

Notes

Last Modified on 25/04/2023 3:17 pm EDT

Within the Customer Record, maintain customer notes from the notes tab. Notes can be stamped with date and time of entry and included on customer reports/queries as needed.

The screenshot displays the RentalPoint Customer interface. The browser address bar shows 'localhost:61893/Customers/CustomProperties'. The main form is titled 'Name & Address' and contains the following fields:

- Customer Code:** WATBUS (with a 'Hide/Disabled' checkbox and a green checkmark icon).
- Name:** Waterloo Business Solutions
- Address:** 2255 Dundas Street West
- Country:** Mississauga
- State:** Ontario
- Post code:** L5K 1R6
- Email & Web:** office@rentp.com (with a mail icon) and www.rentp.com (with a globe icon).
- Customer Type:** Customer (with a dropdown arrow) and a 'Vendor' checkbox.

Below the form is a navigation bar with tabs: Contacts, Postal Address, Phones, Financials, Account Details, and Notes. A red arrow points to the 'Notes' tab. The 'Notes' tab is active and shows a timestamp: 'Tue Jul 21 2020 15:07:13 GMT-0400 (Eastern Daylight Time)'. At the bottom of the interface, there is a 'Stamp' button and a 'Save' button with a green checkmark icon.