

# Contacts

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## Activity List Report

*The activity listing report allows operators to report on current, past and future activities for a selected operator or for all operators.*

*Activities can be viewed in summary form or detailed with notes included. In addition a booking history can be displayed showing the past notes entered for a contact in regards to a particular booking. In this way operators can easily know what topics have already covered when going forward with the next task.*

The activity listing report can be run from the **Contacts** tab by click on the **Reports** menu and selecting **Activity List**.

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right hand side of the window holds all personal information pertaining to the contact such as name, address, phone numbers and email.

The screenshot shows a software window titled "Contact Properties" with a blue header bar. Below the header is a tabbed interface with the following tabs: "Custom", "Contracting", "Contact Picture", "Distribution Lists", and "RPWebServices". The "Contact" tab is active, showing a grid of sub-tabs: "Payment", "Profile", "Current Bookings", "Archived Bookings", "Pending", "History", and "Notes". The main area contains several input fields and sections:

- Contact Information:** Fields for "First", "Middle", and "Last" name, "Dept", "Position", "Drivers Licen", "Address", "Add Line 2", "Suburb", "Country", "Email" (with a checked "Send Email" checkbox), and "Website".
- Company and Venue:** A "Company" field with expand/collapse icons, and a "Venue" field with similar icons.
- Phone Numbers:** Fields for "Phone 1", "Phone 2", "Cell", and "Fax", each with "Country Code" and "Area Code" sub-fields. A "Number" and "Extension" field are also present.
- Fax Options:** A checkbox for "Send Faxes" (checked) and a "Local" dropdown menu.
- Account Manager:** Fields for "Account Manager Co" and "Account Manager Na" with an "Assign Ends" date picker.

At the bottom of the window is a toolbar with buttons: "Save Tab", "Add activity", "New", "Delete", "Save", "Save & Close", and "Cancel".

### Contact Tab

This tab is an overview of information relating to the selected contact including key information

### Profile Tab

This tab holds personal information about the contact like anniversaries, birthdays, spouse's name, etc.

### Bookings Tab

The Bookings tab displays all bookings the contact is associated with. It will display the booking number, value, date, and the customer. Double clicking a row displays the booking information.

### Pending Tab

The Pending tab displays all activities for the selected contact that are not yet completed. The activity, date, time, user, a description, and a reference for the activity are all listed in the grid. Double clicking a row opens the activity.

### History Tab

This tab displays all activities for the selected contact that have been completed. The date, user, activity, and description are all listed in the grid for quick reference.

### Notes Tab

Contains all notes pertaining to this specific contact.

### Custom Tab

The Custom tab holds miscellaneous information that is not provided for in the standard fields. All fields are given specific names by the user through the Contacts Parameters option on the right click menu of the contacts area.

### Contracting Tab

The Contracting tab displays all labor groups that the contact is associated with. Contacts can be made into freelancers or vendors by ticking the box labeled "'Freelance'" and selecting an existing vendor or creating a new one. When creating a cross rental, the contact can be selected from the vendor list.

### Contact Picture Tab

This tab displays a picture of the contact.

### Distribution Lists Tab

The Distribution Lists tab allows operators to maintain which distribution list the contact is included on. Click Add to add the contact to an existing distribution list. Once you select a distribution, click OK. Click Delete to remove a contact from a distribution list.

### RPWebServices Tab

For interaction with RPWebServices module.

Once all the tabs are filled out with the information that you desire the contact can be saved. ***Note that if you are creating a contact you must first click Save to store the basic information. Once the basic information is entered you can add the contact to a company, venue or labour product.***

## Delete Contacts

Deleting contacts is a straight forward. Simply select the contact that you wish to delete, right click and select the delete option. If the contact is used on a booking or previous transaction, the contact will be disabled but not removed.

Note that there is a difference between deleting a contact and un-associating a contact. Deleting a contact from the contacts menu, will completely remove it from the system and you will no longer be able to use it.

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contact	second	AIRPUSH, INC.	877 944-2490
contact		SEUM OF MODERN ART	212 708-9400
contact		SEUM OF MODERN ART	212 708-9400
Crawford			905 475-7892
Fineman			407 898-6375
Finnegan			416 967-7245 x21
Fox			52173
Fox			52173
Green			500
Guilfoyle	Lloyd	Go	
Guilfoyle	Lloyd	my	
InvEdit	mytest		
Jamieson	Scott		020 7680 0078

Deleting a contact (within a customer record) will remove the contact from the list of contacts within a customer, but it will not remove it from the system. You can un-associate a contact via the customer or the contact windows.

Customer Maintenance x

Address | Financials | Insurance | Others | Notes | Fields | Attachments

Customer Code: AIRPUSH  Hide/Disable

Record Type:  Customer  
 Prospect  
 Competitor  
 Other

Company: AIRPUSH, INC.

Street Address	Postal Address	Country Code	Area Code	Number	Extension
Street: 11400 W. OLYMPIC BLVD.		Phone 1: [ ]	877	944-2490	[ ]
Add Line 2: SUITE 200		Phone 2: [ ]	[ ]	[ ]	[ ]
Suburb: LOS ANGELES		Fax: [ ]	[ ]	[ ]	[ ]
State: CA					
Country: USA					
Post code: 90064					

Email Address: info@ [ ]

Confirm x

Remove 'Jeffrey Jones' from the list of contacts associated with this customer

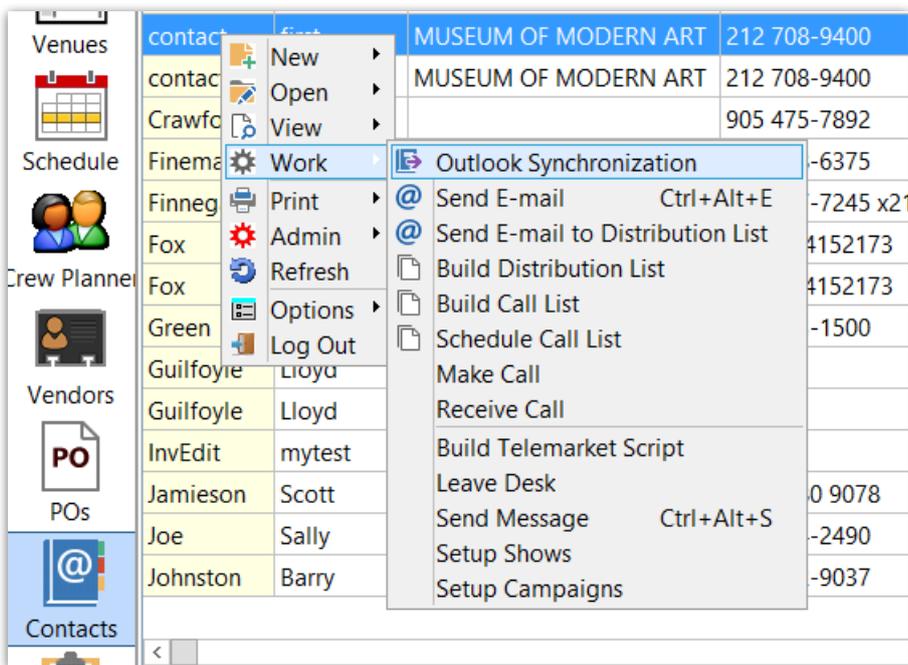
Full name	Position	Phone 1	Phone 2	Cell	Address
Jeffrey Jon					11400 W. C
Rajiv Shari		877 944-249			11400 W. C

Main Contact: Mandy Fox

## Outlook Synchronization

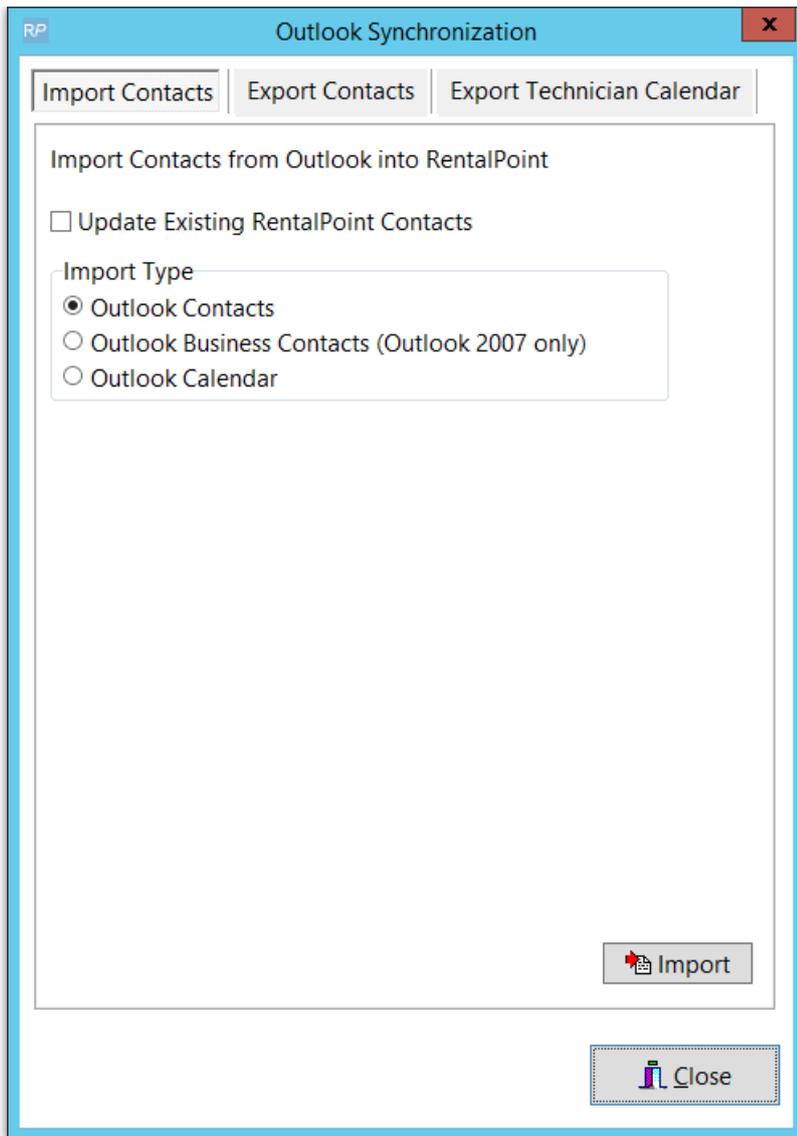
RentalPoint has the ability to integrate contacts with Outlook. RentalPoint can import and export information about contacts and activities with Outlook.

To synchronize Outlook and RentalPoint select the Outlook Synchronization option from the actions menu or right click while in the contacts grid.



### Import Contacts

The Import Contacts option allows you to import all the contacts from Outlook into RentalPoint. Please note that this is a blind transfer, all contacts that exist within Outlook will be imported into RentalPoint.



## Export Contacts

You can export contacts from RentalPoint to Outlook to keep Outlook up to date.

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RP Outlook Synchronization

Import Contacts | **Export Contacts** | Export Technician Calendar

Export Contacts from RentalPoint into Outlook

Update Existing Outlook Contacts

Single Contact  

Contact List  

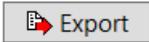
All Contacts Belonging to Current Operator

Company Types

- Customers
- Prospects
- Competitors
- Other
- No Company

All Activities Belonging to Current Operator

to

 Export

 Close

### Export Technician Calendar

Keep your schedule up to date by exporting Technician Assignments from RentalPoint to Outlook.

RP Outlook Synchronization

Import Contacts | Export Contacts | Export Technician Calendar

Export Technician Calendar from RentalPoint into Outlook

Options

- Crew Assignments WITH Technicians
- Crew Assignments WITHOUT Technicians
- Activities

Date Range

Inclusive: 2017-10-14 to Exclusive: 2017-10-21

Booking Scope

- All
- Selected Booking

Technician

- All
- Selected Technician

Location Scope

- All
- Select Location: 0 - Toronto

Export

Close

## Technician Insurance



