

Change Customer Code for Existing Customer

Last Modified on 08/07/2020 2:17 pm EDT

Current Customer

RentalPoint 12.0.0.6
 Actions Reports Crystal Reports Assets Setup Others Help

Code	Contact	Organization	Country	Zip Code	Web Address	Phone 1	Salesperson	First Invoice Date	Date Record Created	Credit Card Name	Credit Card Expiry
WOOLPERT	Joe Soap	WOOLPERT LABS	USA	23320	http://www.woolpert.com/contact-us/locations#va	757-549-3549	KCAV1	10-21-2015	4-7-2014		

Current Bookings


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 Actions Reports Crystal Reports Assets Setup Others Help


Code	Company	Project	Out	Date	Time	Show Name	In	Date	Time	Progress Status	Stat	Invoice No.	Salesperson
WOOLPERT00003	WOOLPERT LABS		Fri	9-19-2014	08:00		Sat	9-20-2014	09:00	Confirmed	RN		
WOOLPERT00004	WOOLPERT LABS		Mon	1-26-2015	08:00		Mon	1-26-2015	15:15	Confirmed	BY	198	
WOOLPERT00007	WOOLPERT LABS		Thu	7-9-2015	09:00		Fri	7-10-2015	18:00	Confirmed	BY	73	
WOOLPERT00008	WOOLPERT LABS		Thu	7-9-2015	09:00		Fri	7-10-2015	18:00	Confirmed	BY	72	
WOOLPERT00009	WOOLPERT LABS		Wed	7-29-2015	15:00		Wed	8-5-2015	12:00	Confirmed	BN		
WOOLPERT00010	WOOLPERT LABS		Tue	1-27-2015	08:00		Fri	2-13-2015	16:23	Confirmed	BY	114	
WOOLPERT00011	WOOLPERT LABS		Wed	8-10-2016	09:00	Keane Wedding	Thu	8-11-2016	18:00	Confirmed	BY	119	RP
WOOLPERT00013	WOOLPERT LABS		Tue	8-1-2017	09:00		Thu	8-3-2017	13:00	Light Pencil			



To change the customer code, access the Database Wizard per menu option below


Setup Others Help

View	Print Cycle billed			
	Import / Export	>		
	Display Log Files	>		
any	Archiving	>	Date	Time
loo Busi	Utilities	>		Show Name
an, Sach	Change Operator	Ctrl+F3	RentalPoint Service	
st	View Current Operators		Calendar Server	
ST	Operator Reports	>	Database Wizard	
ST	Open a Second Copy	Ctrl+Alt+O	Change ALL Attachment's Document Path	
ST	Operator Options	>	Restore Attachments	
ST			Format Phone Numbers	
ST		Wed	Update or Fix Cash Receipt Batch No	
ST		Tue	Re-load Stored Procedures and Views	
ST	MUSC	Fri	Reset Booking Grid Column Order	
ST		Tue	Remove Lock From Parameter Setup	
lnn Business Solutions	MYTFST	Tue	Clear Log Files	
			Update licensing	

 Find and Connect to an SQL Server Database

 View Windows and SQL Troubleshooting Tips

 Database Utilities Area 

SQL Instances Currently Installed  Refresh Instance List

Click Refresh to view list of installed SQL Instances ...

Database Utilities Area ×

You are connected to database v11_3_3_4 on server desktop-k5r38k2\sqlexpress. RentalPoint version 12.0.0.6.


Availability System

-
-
-

Checkout / Return System

-

Customer Utilities

- 

Technician Utilities

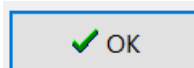
-

Activity Log

Connected to database

Use to search for the current customer,

then enter the new customer code and click



RP Change Customer Code

Old Code:

New Code:

Information

Update complete.

The current customer code is replaced by the newly selected code

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Bookings New Find Open View

Code	Contact	Organization	Country	Zip Code	Web Address	Phone 1	Salesperson	First Invoice Date	Date Record Created	Credit
WOOLTON	Joe Soap	WOOLPERT LABS	USA	23320	http://www.woolpert.com/contact-us/locations#va	757-549-3549	KCAV1	10-21-2015	4-7-2014	

All current bookings, attachments, invoices etc are modified to show the new customer code in the file name









RentalPoint 12.0.0.6

Actions Reports Crystal Reports Assets Setup Others Help

Bookings New Find Open View Work

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Edit the customer record to change the organization name, address etc, you'll need to manually keep record of the old customer name, address etc in either the Notes tab or use the custom fields option

Address	Financials	Credit Card	Others	Notes	Fields	Attachments
Formerly Woolpert Labs 07/20/20 11:48 AM RP						
						 Add Time
						
 New	 Edit	 Delete	 Save and Close	 Save	 Cancel	