

## Booking Contacts

Customer record may have 3 contact types:

Main – contact of customer’s representative

Payment – contact that will receive all charges

Non Main/Payment – contact for other purposes

### Customer Record section

Customer Maintenance
✕

Address
Financials   Credit Card   Others   Notes   Fields   Attachments

Customer Code  [Icons]

Organisation  [Icons]

Street Address  Postal Address

Street  Suburb  City  State  Country

Postal Code  [Icon]

Website Address  [Icon]

Email Address  [Icon] A/R Email Address  [Icon]

Record Type

Customer

Prospect

Competitor

Other

Hide/Disable

Country Code   Area Code   Number   Extension

Phone 1

Phone 2

Fax

Fax Options  Dial Area Code  ▼

Cell

First Name	Last Name	Position	Phone 1	Phone 2	Cell	Address
Main	Contact	Position	1 063 4149436	8 098 8564512		Address
Payment	Contact	QA			1 036 8884455	

Main Contact  [Add Existing] [New] [Open] [Delete] [Copy Phone]

PaymentContact   Main Contact    Payment Contact

[New]
[Edit]
[Delete]
[Save and Close]
[Save]
[Cancel]

## Booking Section

New bookings will be auto filled with contact from customer record:

The screenshot displays a software interface for managing bookings and contacts. The top section is a form for creating a booking, with tabs for Customer, Calendar, Equipment, Crew, Venue, Notes, Payments, Attachments, Other Details, Status, and Followup. The form includes fields for Invoice To (New Customer, Customer Code, Organisation, Web, Street Address, Suburb, City, State, Country, Postal Code), Bill To (Name, Address), and Booking Type (Rental, Currency, Rental Price Set Customer Pays, Sales Price Customer Pays, Rental price, Rental discount rate %, Rental income type). Below the form is a table of contacts with columns for First Name, Last Name, Position, Phone 1, Phone 2, Call, and Address. The table contains two rows: 'Main Contact' and 'Payment Contact'. Red arrows point from the 'Payment Contact' row in the table to the 'Payment Contact' field in the booking form. Below the table are buttons for 'Booking Contact', 'Main Contact', 'Customer Contact', and 'Payment Contact', along with checkboxes for 'Booking', 'Customer', and 'Payment'.

First Name	Last Name	Position	Phone 1	Phone 2	Call	Address
Main	Contact	Position	1 903 4142436	8 998 8564512		Address
Payment	Contact	QA			1 036 8884455	

Payment contact could be changed for each booking.

*Note. Only one Contact could be selected as payment contact. Customer contact could not be changed via booking. (Could be done only from customer record)*

## Financials section

Payment contact will be auto filled in account payment form (Customers tab – Financials – Account Payment):

RP Account Payment

Payment Details | Invoices and Payments | Security Deposits

Customer

Code: CUSTOMER [Find] [Search]

Organisation: Customer

Contact name: Payment Contact

Payment Details

Payment Date: 22/1/15 [Calendar]

Payment in Other Currency: 0.00 \$ [Dropdown]

Payment Amount: 0.00

Apply as Pre-Payment

Memo: [Text Box]

All amounts shown in currency

Account Details

Payments (last 30 days): 0.00

Current: 0.00

30 days: 0.00

60 days: 0.00

90 days+: 0.00

Total Due: 0.00

[Close] [Cancel]

## Reports section

Payment contact displays on Accounts Receivable Aged Analysis Report:

Date Printed: 22/01/15 Accounts Receivable Aged Analysis For All Accounts Closing Date: 31/01/15 Page: 1

From Customer: CUSTOMER to CUSTOMER Includes Customers With Zero Balances

Transaction Scope: Current Transactions

Printed For: Anton Company

Code	Organisation	Balance	Current	30 days	60 days	90 days	Type
CUSTOMER	Customer		-30	-30	0	0	0 30 day account
	Street						
	Suburb						
	City						
	Contact: Payment Contact						
	Credit Limit: \$ 10,000.00						
	Phone 1: 1 036 2956678						
	Fax:						
	Last Payment Date: 22/01/15						
	Last Payment Amount: \$ 300.00						
Type	Doc No.	Date	Ref	Debit	Credit	Balance	
Invoice	2	13/01/2015		13	0	0	
Invoice	15	22/01/2015		22	0	0	
Invoice	16	22/01/2015		22	0	0	
Invoice	17	22/01/2015		22	300	300	
Credit	17	22/01/2015		22	30	270	
Payment	17	22/01/2015		22	300	-30	
Foreign Currency Amount		\$ 300.00					
---	Grand Totals ---						
		Balance	Current	30 days	60 days	90 days	
			-30	-30	0	0	0

Legend [ \* ] Customer has a balance over the allowed limit.

.csv output

## Operator Privileges section

Payment contact modifying could be restricted by operator privileges (Setup – Operators – Select appropriate operators group – Bookings tab):

RP Edit Group Record : ADMINISTRATOR

Reports	Printing Options	Setup and Utilities	Contact Management Access	Other	Crew and Activities
Group Name	Bookings	Sub rentals and Transfers	Customers and Vendors	Products and PO's	Checkout, Return and Maintenance
<b>General</b> <input checked="" type="checkbox"/> New Enquiry <input checked="" type="checkbox"/> Modify a Booking <input checked="" type="checkbox"/> Place a Quote <input checked="" type="checkbox"/> Place a Light Pencil Booking <input checked="" type="checkbox"/> Place a Heavy Pencil Booking <input checked="" type="checkbox"/> Place a Confirmed Booking <input checked="" type="checkbox"/> Can Save Bookings <input checked="" type="checkbox"/> Cancel a Booking <input checked="" type="checkbox"/> Cancel a Returned Booking <input checked="" type="checkbox"/> Cancel or Delete a Checked Out Booking <input checked="" type="checkbox"/> Must Enter Cancel Reason <input checked="" type="checkbox"/> Delete a Booking <input checked="" type="checkbox"/> Must Enter Delete Reason <input checked="" type="checkbox"/> Extend a Booking <input checked="" type="checkbox"/> Return a Booking <input checked="" type="checkbox"/> Duplicate a Booking <input checked="" type="checkbox"/> Can Set Booking Status to "Pull" <input type="checkbox"/> <b>Can Modify Payment Contact in a Booking</b> <input type="checkbox"/> <b>Can Modify Payment Contact in Customer</b>		<input checked="" type="checkbox"/> Change Booking Currency <input checked="" type="checkbox"/> Change Op Who Owns Booking <input checked="" type="checkbox"/> Modify After Invoicing <input checked="" type="checkbox"/> Change Complete Status <input checked="" type="checkbox"/> Can Confirm When Credit Limit Exceeded <input type="checkbox"/> Can Change Customer <input checked="" type="checkbox"/> Complete Status of All Bookings  <b>Equipment Tab</b> <input checked="" type="checkbox"/> Can Delete Checked Out Non-Assets <input checked="" type="checkbox"/> Can Delete Returned Items <input checked="" type="checkbox"/> Can Override Total Price <input checked="" type="checkbox"/> Can Edit Unit Rate Column <input checked="" type="checkbox"/> Can Edit Line Item Price <input checked="" type="checkbox"/> Prompt for Price Override Reason <input checked="" type="checkbox"/> Show Monetary Figures <input checked="" type="checkbox"/> Apply Rental Discount <input checked="" type="checkbox"/> Apply Sales Discount <input checked="" type="checkbox"/> Can Change Taxes <input checked="" type="checkbox"/> Can View Sales Item Costs Prices		<b>Others Tab</b> <input checked="" type="checkbox"/> Can Add New Event Types <input checked="" type="checkbox"/> Can Change 'Return To' Region/Location  <b>Payment Tab</b> <input checked="" type="checkbox"/> Access to the Payments Tab <input checked="" type="checkbox"/> Can Change Payment Method  <b>Locking</b> Booking Lock options are on the Setup and Utilities page.  <b>Main Booking Screen</b> <input checked="" type="checkbox"/> Create New Project <input checked="" type="checkbox"/> Show Revenue in Booking Grid <input checked="" type="checkbox"/> Able to View ALL Dates	