Creating a Client

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1. Select **-- NEW COMPANY --** from the **Company** drop down
2. Enter the name of your client
3. Select **Client** from the **Type** drop down
4. *Optionally* Enter their mailing address
5. *Optionally* record your sales person or account manager responsible for this client
6. Configure their **Auto Docket** settings
7. *Optionally* enter your main contact's name and contact details
8. *Optionally* enter the client's GST number for information purposes only
9. Enter the **Account Code** for this client from your Accounting Software
10. *Optionally* assign a FAF Group or *optionally* enter a manual Fuel Adjustment Factor
11. *Optionally* enter your internal reference for this customer, for information purposes only
12. Click the **Add** button to save the new client

New Client

Once your new client has been created it will become a freight payer option on booking screens and you will be able to create logins for this client so that they can log into your account and create and manage their own bookings.

See the User articles for information on creating and managing users

Preview