Creating, modifying and disabling a client company record

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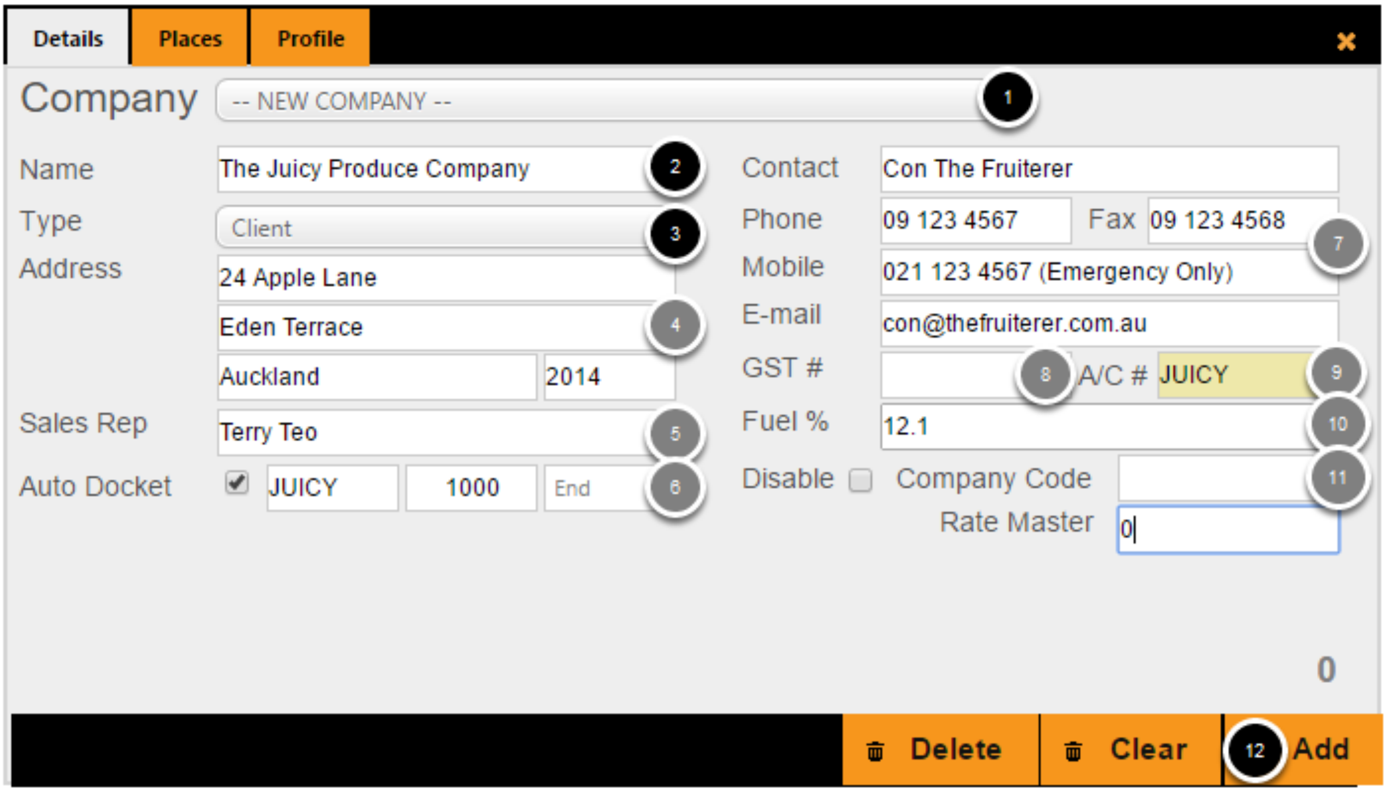
The Companies Screen

The **Companies** screen (found in the **Super User** menu) allows you to create and modify client and subcontractor company records, and FAF Groups. Bookings can only be made for clients that have an active company record.

Only internal users can create company records and require the **Super User** task **Client Company Maintenance**

Creating a client company record

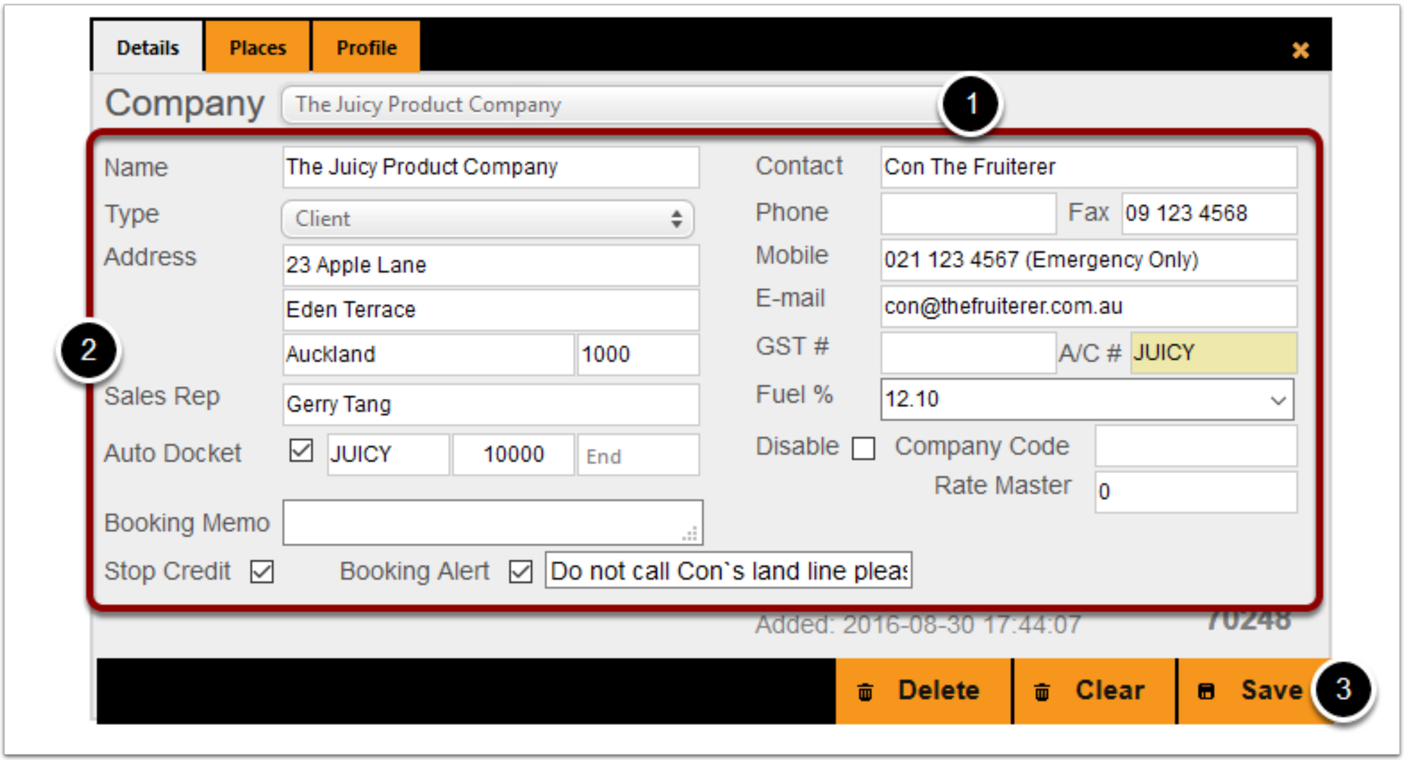
1. Select **-- NEW COMPANY --** from the **Company** drop down
2. Enter the name of your client
3. Select **Client** from the **Type** drop down
4. *Optionally* Enter their mailing address (For information purposes only)
5. *Optionally* record your sales person or account manager responsible for this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



For information on creating a Subcontractor company record, see the Subcontractors chapter

Modifying a client company record

1. Select a company to modify from the **Company** drop down
2. Update the company record's details
3. Click the **Save** button



Booking memos

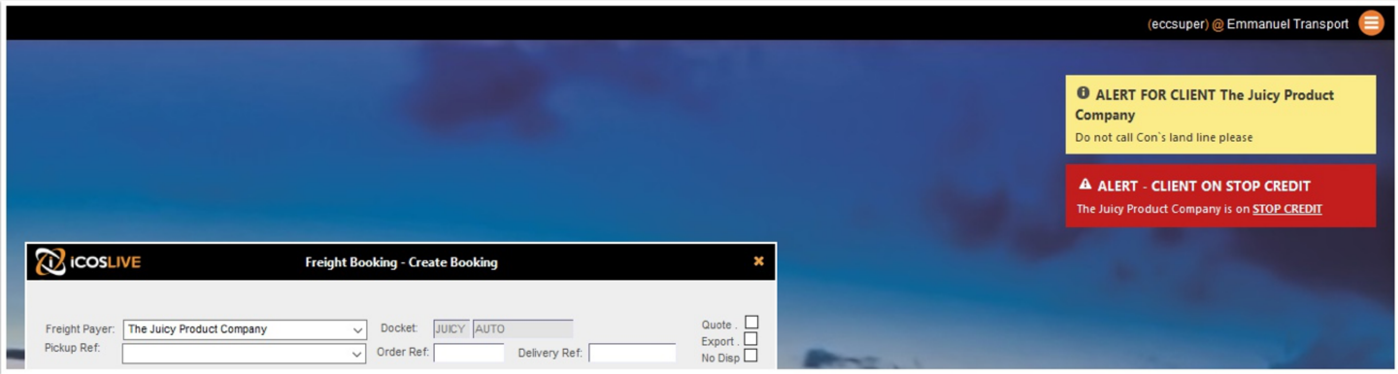
The **Booking Memo** field allows you to record free form information about a client and is an available option once a client company record has been created. This information is displayed on the Utilisation screen for each of this client's jobs in the **Booking Memo** column.

Stop Credit alert

The **Stop Credit** check box allows you to identify clients who should not have bookings created for them due to overdue invoices and is an available option once a client company record has been created. When a client has this check box checked a canned warning message will appear in red to any internal user who creates a booking for them.

Booking Alert

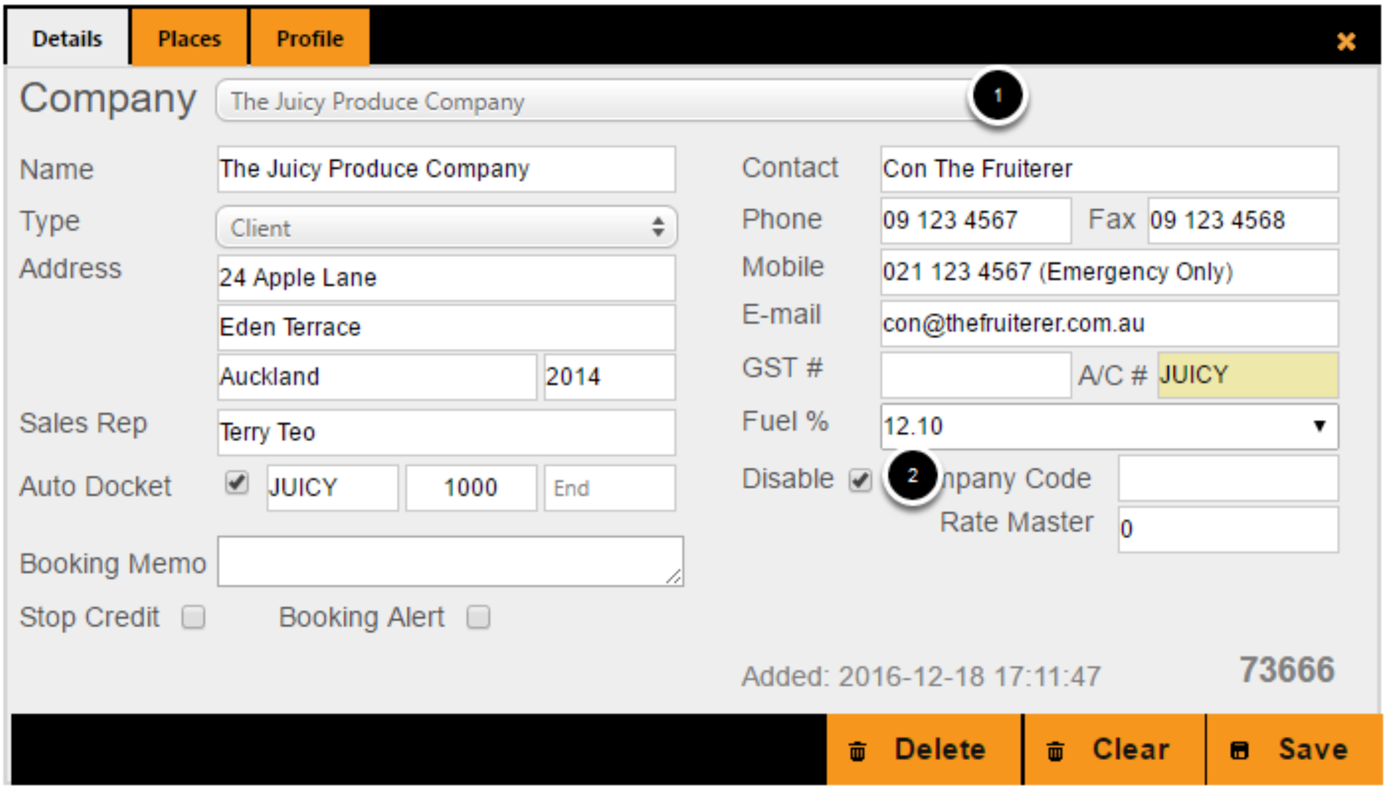
The **Booking Alert** check box and text field allows you to create a custom alert whch is displayed when any internal user creates a booking for this client and is an available option once a client company record has been created.



Disabling a client company record

Disabling a company record stops booking being able to be made for it.

1. Select a company to disable from the **Company** drop down
2. Check the **Disable** check box
3. Click **Save**



Deleting a client company record

Deleting a client company record will permantently delete the company record and every booking for this client and cannot be undone.

1. Select a company to delete from the **Company** drop down
2. Click the **Delete** button

Deleting a client is permanent and in most cases they should be disabled instead

Preview