

# Creating, modifying and disabling a client company record

Modified on: Wed, 28 Nov, 2018 at 2:26 PM

## 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

**Company** -- NEW COMPANY --

**Name** The Juicy Produce Company

**Type** Client

**Address** 24 Apple Lane  
Eden Terrace  
Auckland 2014

**Sales Rep** Terry Teo

**Auto Docket** ☒ JUICY 1000 End

**Contact** Con The Fruiterer

**Phone** 09 123 4567 **Fax** 09 123 4568

**Mobile** 021 123 4567 (Emergency Only)

**E-mail** con@thefruiterer.com.au

**GST #** **A/C #** JUICY

**Fuel %** 12.1

**Disable** ☐ **Company Code** **Rate Master** 0

**Buttons:** Delete Clear Add

💡 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

**Company** The Juicy Product Company

**Name** The Juicy Product Company

**Type** Client

**Address** 23 Apple Lane  
Eden Terrace  
Auckland 1000

**Contact** Con The Fruiterer

**Phone**  **Fax** 09 123 4568

**Mobile** 021 123 4567 (Emergency Only)

**E-mail** con@thefruiterer.com.au

**GST #**  **A/C #** JUICY

**Fuel %** 12.10

**Sales Rep** Gerry Tang

**Auto Docket** ☒ JUICY 10000 End

**Booking Memo**

**Stop Credit** ☒ **Booking Alert** ☒ Do not call Con's land line please

Added: 2016-08-30 17:44:07 70248

**Delete** **Clear** **Save**

## 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 which 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.

Freight Booking - Create Booking

Freight Payer: The Juicy Product Company Docket: JUICY AUTO Quote: ☐  
 Pickup Ref: Order Ref: Delivery Ref: Export: ☐  
 No Disp: ☐

**ALERT FOR CLIENT The Juicy Product Company**  
Do not call Con's land line please

**ALERT - CLIENT ON STOP CREDIT**  
The Juicy Product Company is on **STOP CREDIT**

## 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**

Company: The Juicy Produce Company

Name: The Juicy Produce Company

Type: Client

Address: 24 Apple Lane  
Eden Terrace  
Auckland 2014

Sales Rep: Terry Teo

Auto Docket: ☒ JUICY 1000 End

Booking Memo:

Stop Credit: ☐ Booking Alert: ☐

Contact: Con The Fruiterer

Phone: 09 123 4567 Fax: 09 123 4568

Mobile: 021 123 4567 (Emergency Only)

E-mail: con@thefruiterer.com.au

GST #: A/C # JUICY

Fuel %: 12.10

Disable: ☒ Company Code: Rate Master: 0


Added: 2016-12-18 17:11:47 73666

Delete Clear Save

## Deleting a client company record

Deleting a client company record will permanently 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