Updating a Client

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1. Select a client from the **Company** drop down
2. Modify existing data or add new details
3. Click the **Save** button to apply your changes

Booking Memo

The **Booking Memo** field allows you to record free form information about the client. This information is displayed on the Utilisation screen for each of this client's jobs in the **Booking Memo** column.

Stop Credit

The **Stop Credit** check box allows you to identify clients who should not have bookings created for them due to overdue invoices. 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 allow you to create a custom alert whch is displayed when any internal user creates a booking for this client.

Zoom: (http://icoslive.screenstepslive.com/s/15520/m/59221/l/666999-updating-a-client/show_image?image_id=231129)

Disable

The **Disable** check box allows you to temporarily stop a client from having any bookings created.

Delete

The **Delete** button completely removes a client and all of their active and completed bookings from your account, and cannot be undone.

It is suggested that you use the **disable** check box to stop a client from having jobs booked as this can be undone at a later stage when and if they become a client again.

Preview