

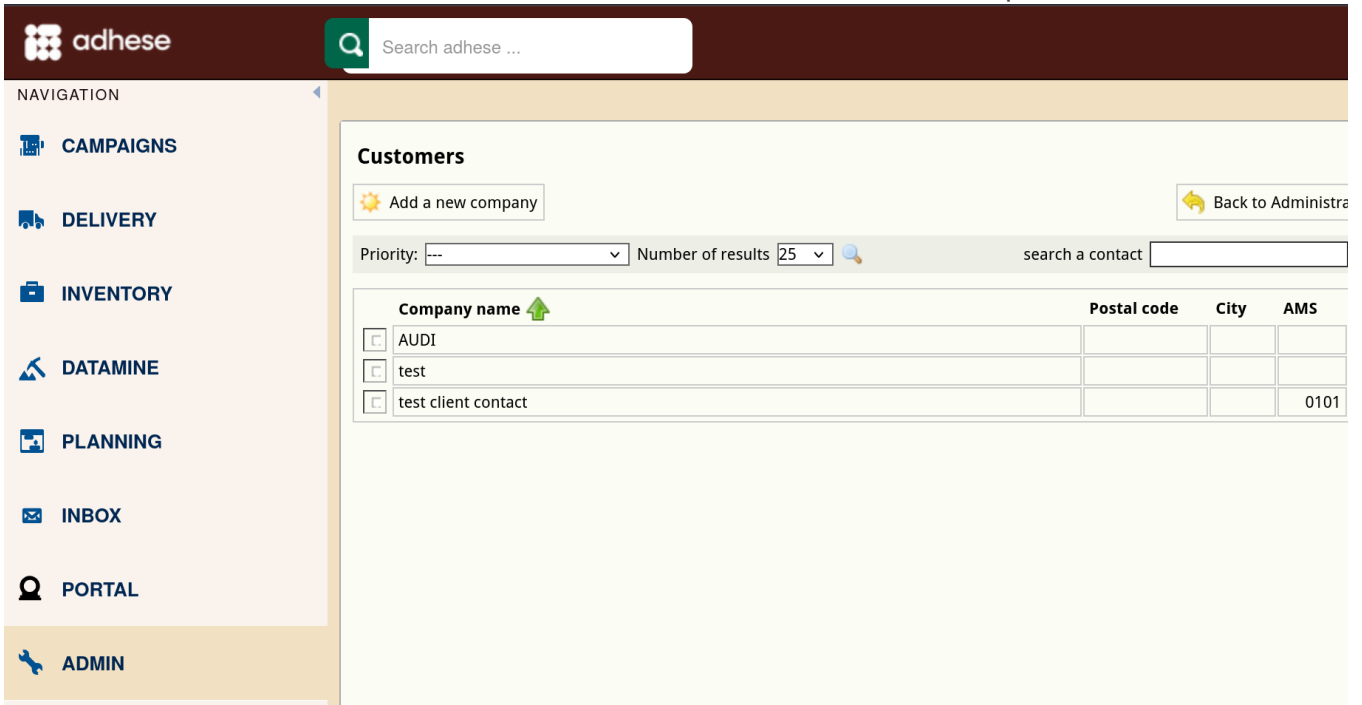
Clients

Add a client

In the *Header* tab of a campaign, you can add several parties or companies in the Client part.

To add a new company to your account:

1. Click *Customers* on the *Administration* screen. The *Customers* screen opens:

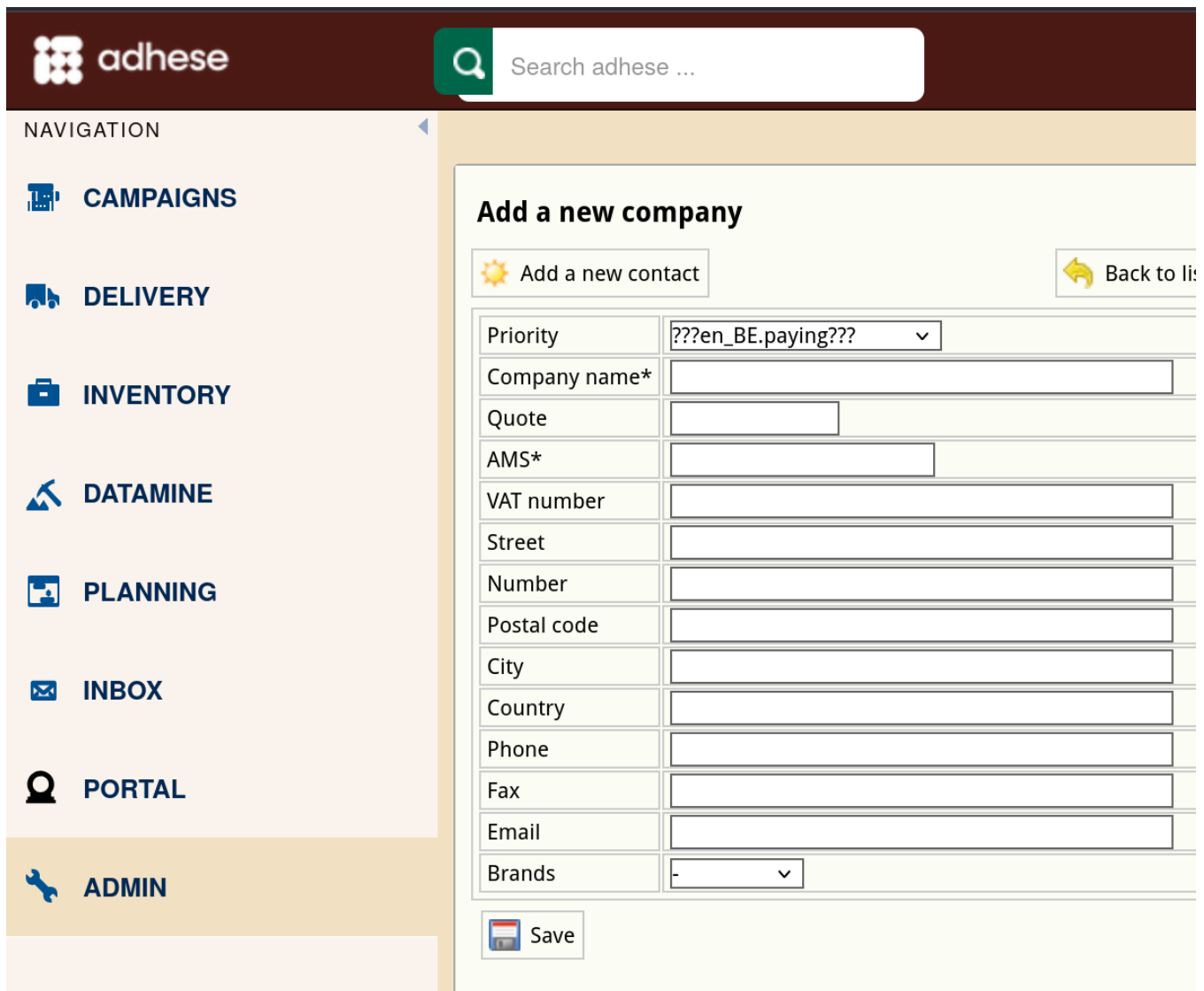


The screenshot shows the 'Customers' screen in the adhese application. On the left is a navigation menu with the following items: CAMPAIGNS, DELIVERY, INVENTORY, DATAMINE, PLANNING, INBOX, PORTAL, and ADMIN. The main area is titled 'Customers' and features a search bar at the top with the text 'Search adhese ...'. Below the search bar is a button labeled 'Add a new company' and a 'Back to Administration' button. There are also filters for 'Priority: --' and 'Number of results: 25'. A search input field contains the text 'search a contact'. Below these elements is a table with the following columns: Company name, Postal code, City, and AMS. The table contains three rows of data:

Company name	Postal code	City	AMS
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test			
test client contact			0101

For more information about the *Customers* screen, refer to Customers.

2. To add a new client or company, click the *Add a new company* button. The *Add a new company* screen opens:



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NAVIGATION

- CAMPAIGNS
- DELIVERY
- INVENTORY
- DATAMINE
- PLANNING
- INBOX
- PORTAL
- ADMIN

Add a new company

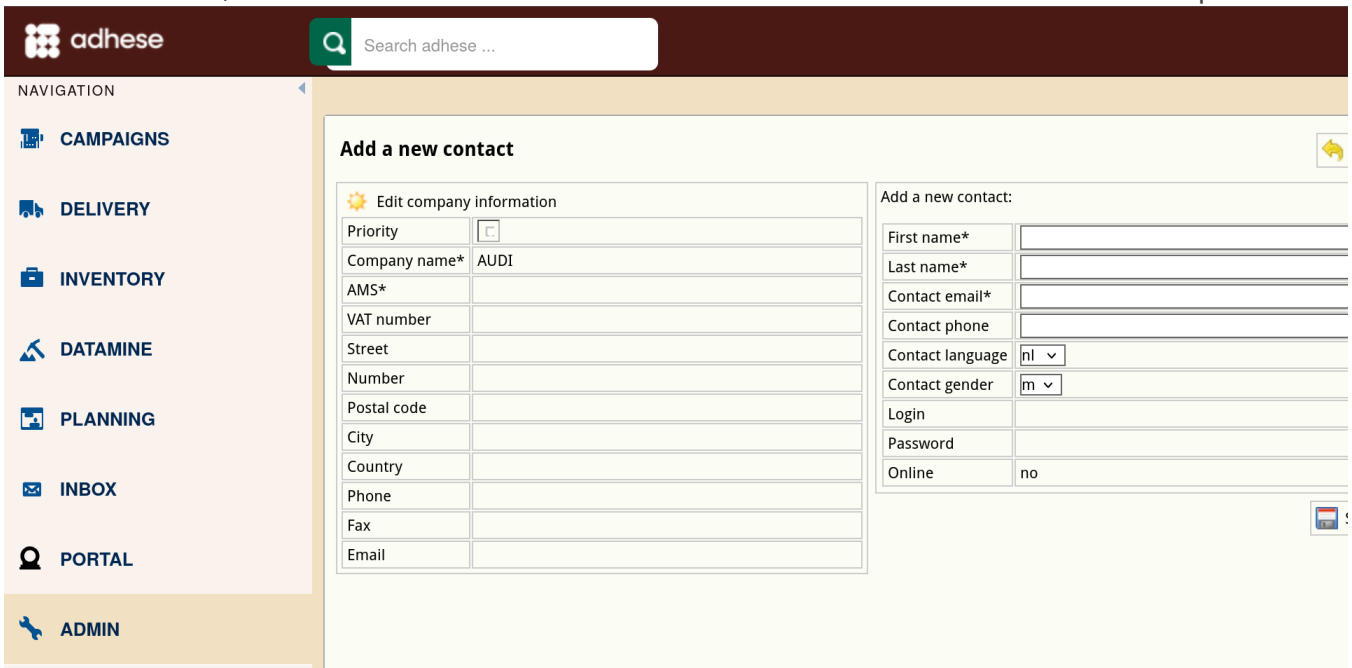
Priority	???en_BE.paying??? v
Company name*	<input type="text"/>
Quote	<input type="text"/>
AMS*	<input type="text"/>
VAT number	<input type="text"/>
Street	<input type="text"/>
Number	<input type="text"/>
Postal code	<input type="text"/>
City	<input type="text"/>
Country	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Email	<input type="text"/>
Brands	- v

- Define the following details:
- (Optional) Select a billing method for the company from the **Invoice type** drop-down.
- Enter the name of the company in the **Company name** field.
- (Optional) Enter an abbreviated company name in the **Quote** field.
- Enter the AMS ID of the company in the **AMD** field.
- (Optional) Enter the VAT number of the company in the **VAT number** field.
- (Optional) Enter the name of the street of the company's address in the **Street** field.
- (Optional) Enter the number of the company's address in the **Number** field.
- (Optional) Enter the postal code of the company's address in the **Postal code** field.
- (Optional) Enter the city of the company's address in the **City** field.
- (Optional) Enter the country of the company's address in the **Country** field.
- (Optional) Enter the telephone number of the company in the **Phone** field.
- (Optional) Enter the fax number of the company in the **Fax** field.
- (Optional) Enter the email address of the company in the **Email** field.
- Click the **Save** button.

Add a new contact

To add a contact to a company:

1. Click *Customers* on the *Administration* screen. The *Customers* screen opens.
2. Click the company's name or click the edit icon for the company you want to add a client to.
3. Above the form, click the *Add a new contact* button. The *Add a new contact* screen opens:




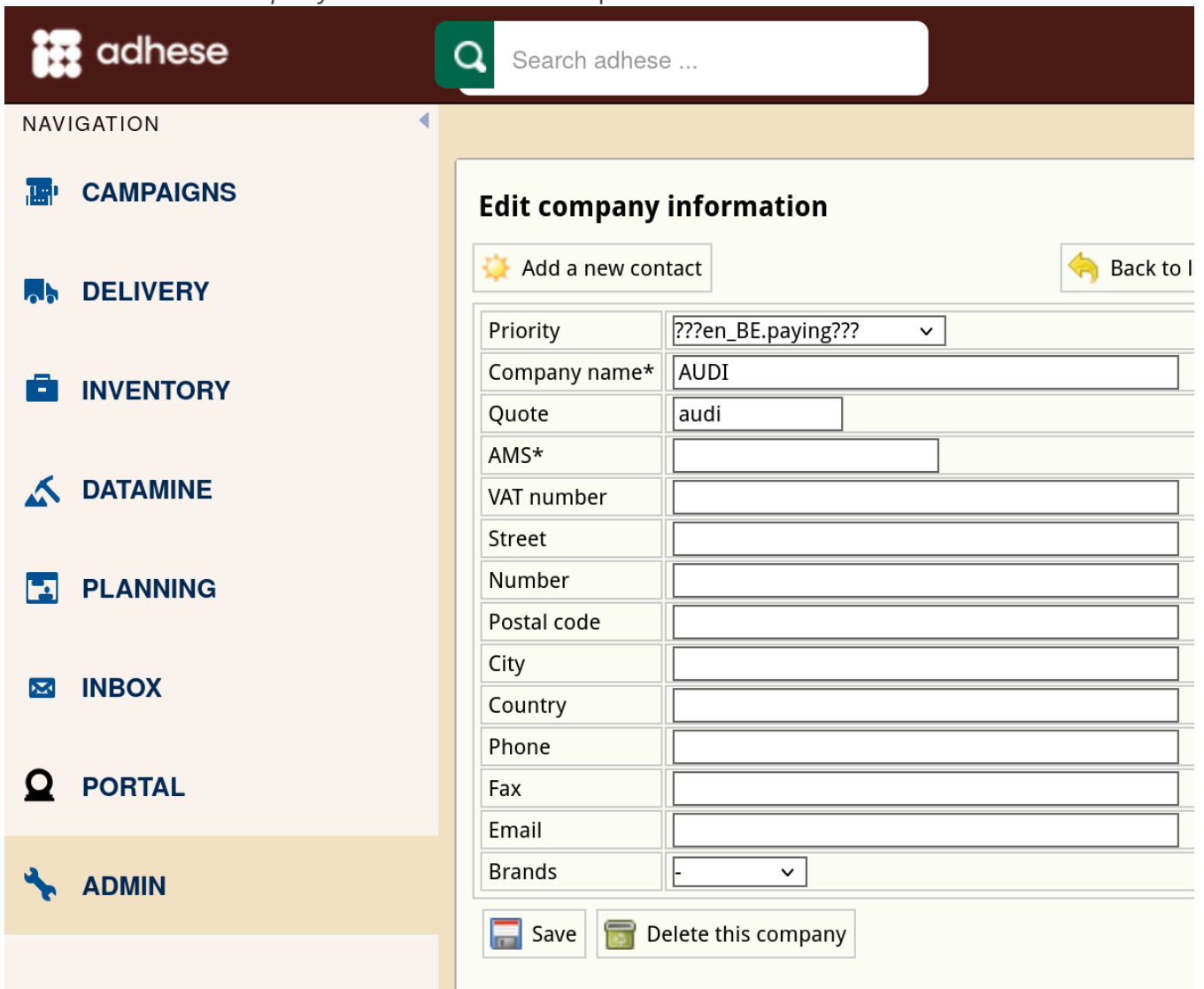
4. Define the following details:
 1. Enter the name of the contact in the **First name** field.
 2. Enter the surname of the contact in the **Last name field**.
 3. Enter the email address of the contact in the **Contact email** field.
 4. (Optional) Enter the phone number of the contact in the **Contact phone** field.
 5. (Optional) Choose a language from the **Contact language** drop-down.
 6. (Optional) Select a gender from the **Contact gender** drop-down.
5. Click the *Save* button.

Edit a client

To edit a client or customer:

1. Click *Customers* on the *Administration* screen. This opens the *Customers* screen.


- To edit a client or company, click the company's name you want to modify or click the edit icon . The *Edit company information* screen opens:



- Change any of the details.
- Click the *Save* button.

Delete a client

To delete a client:

- Click *Customers* on the *Administration* screen. The *Customers* screen opens.
- To delete a company, click the company's name you want to delete or click the edit icon . The *Edit company information* screen opens.
- Beneath the form, click the *Delete this company* button.

Revision #2

Created 7 February 2025 12:49:56 by Casper Steuperaert

Updated 1 August 2025 12:19:02 by Casper Steuperaert