

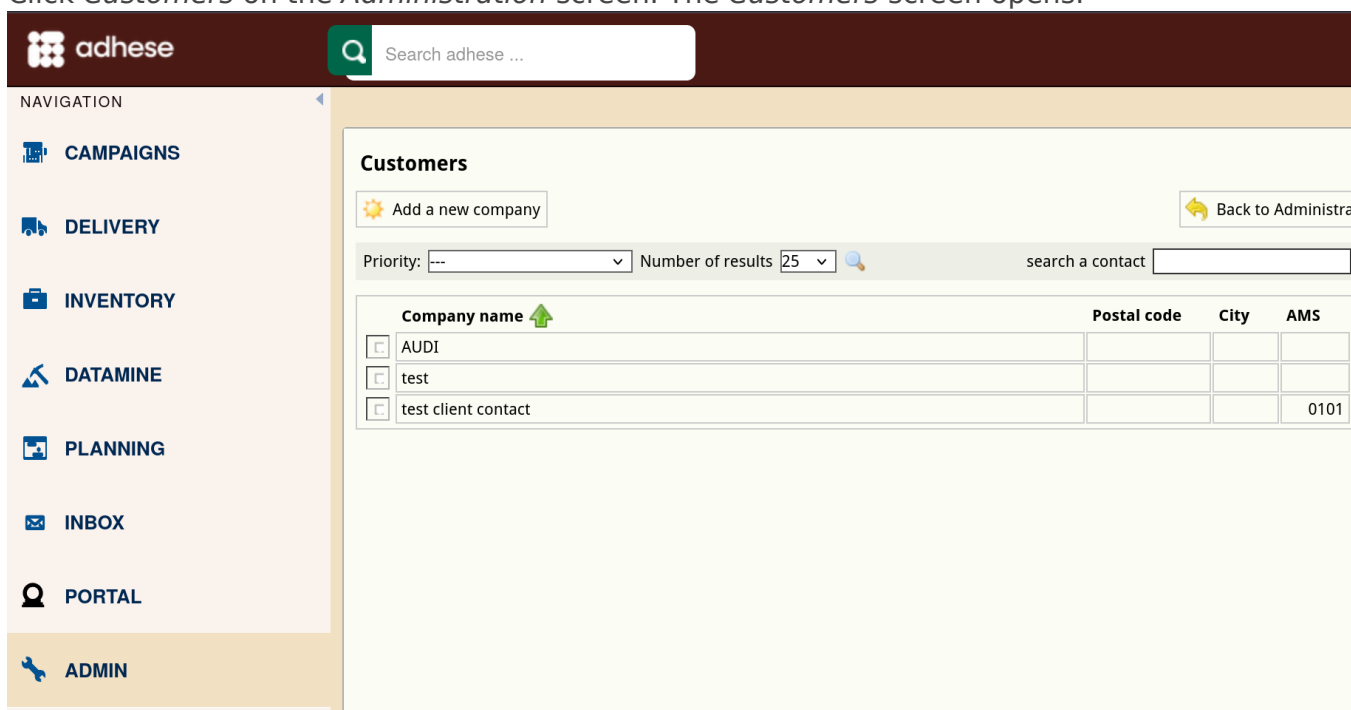
Clients

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 Adheses web application interface. On the left is a navigation menu with options: CAMPAIGNS, DELIVERY, INVENTORY, DATAMINE, PLANNING, INBOX, PORTAL, and ADMIN. The main content area is titled 'Customers' and includes a search bar, a 'Add a new company' button, and a 'Back to Administration' button. Below these are filters for 'Priority' and 'Number of results' (set to 25). A table displays a list of companies with columns for 'Company name', 'Postal code', 'City', and 'AMS'.

Company name	Postal code	City	AMS
AUDI			
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:








NAVIGATION


 CAMPAIGNS


 DELIVERY


 INVENTORY

 DATAMINE


 PLANNING


 INBOX

 PORTAL


 ADMIN

Add a new company

 Add a new contact

 Back to list

Priority	???en_BE.paying??? v
Company name*	
Quote	
AMS*	
VAT number	
Street	
Number	
Postal code	
City	
Country	
Phone	
Fax	
Email	
Brands	- v

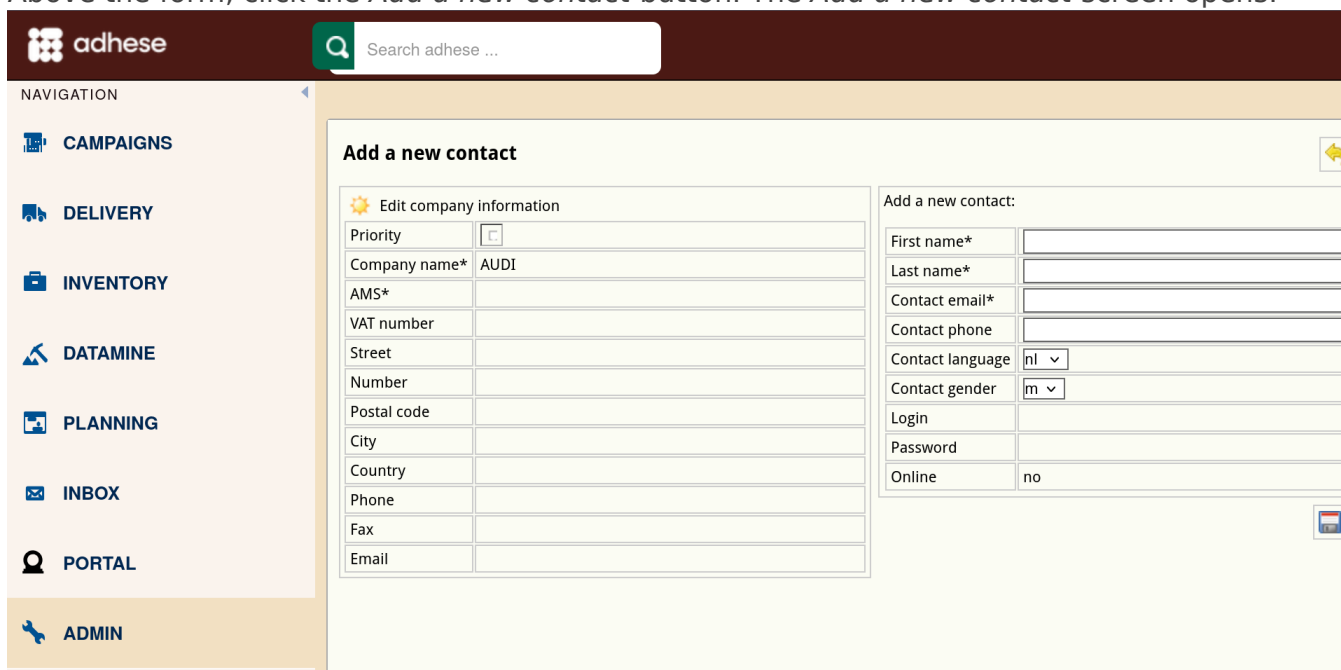
 Save

- 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:




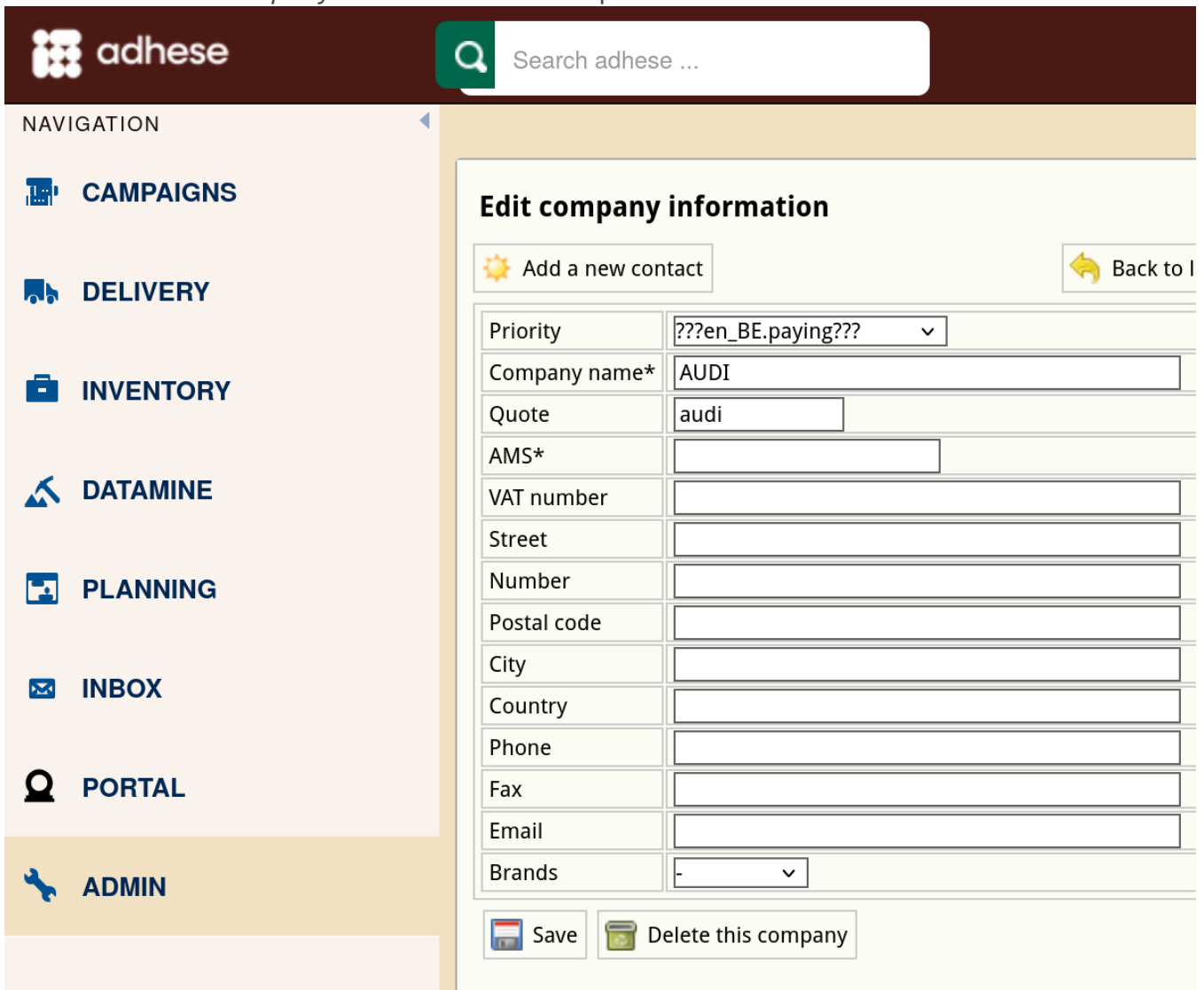
4. Define the following details:
 1. Enter the name of the contact in the **First name** field.
 2. Enter the surname of the contact in the **Last name field**.
 3. Enter the email address of the contact in the **Contact email** field.
 4. (Optional) Enter the phone number of the contact in the **Contact 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:





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NAVIGATION

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

Edit company information

 Add a new contact  Back to I


Priority	???en_BE.paying??? ▼
Company name*	AUDI
Quote	audi
AMS*	
VAT number	
Street	
Number	
Postal code	
City	
Country	
Phone	
Fax	
Email	
Brands	- ▼

 Save  Delete this company

- 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.

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