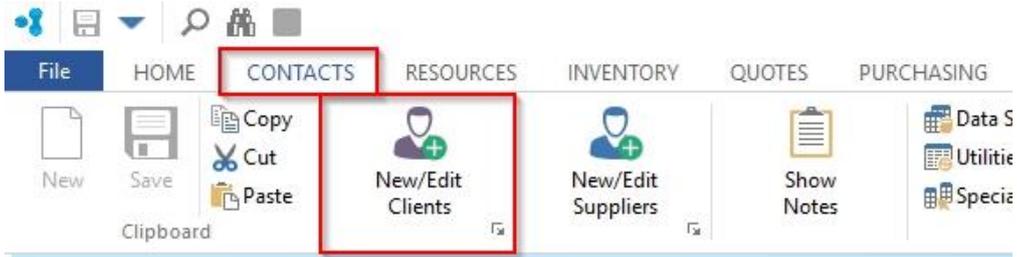


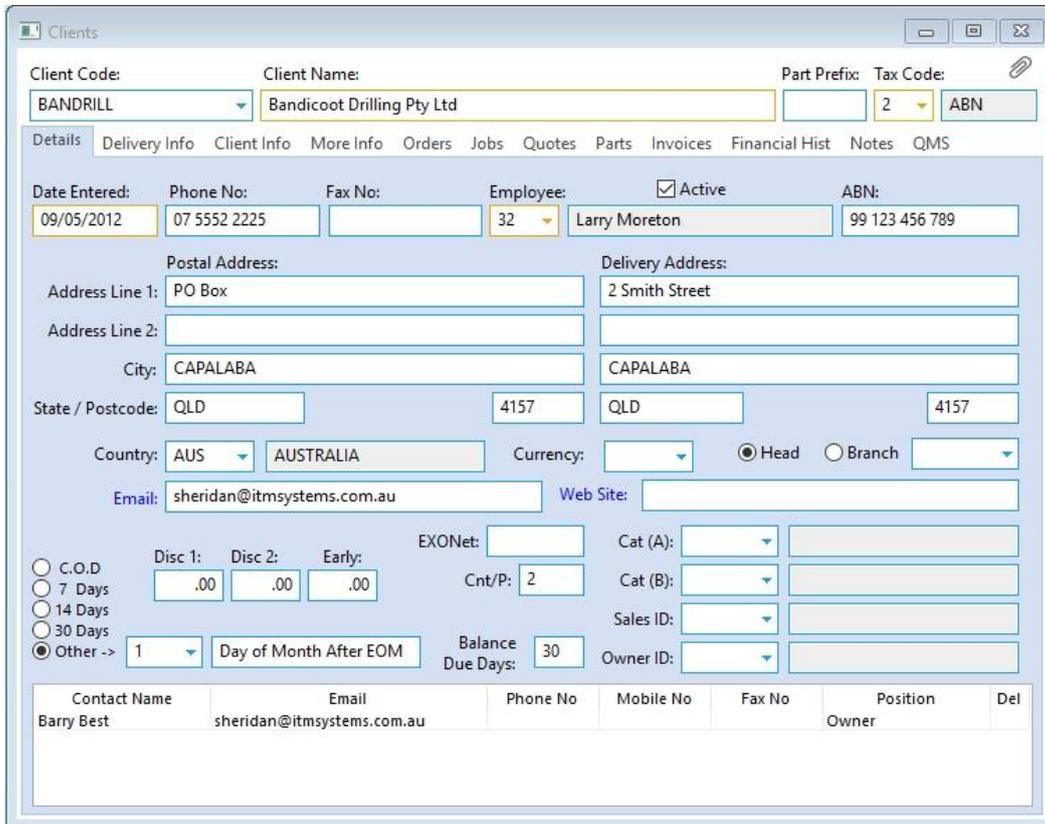
Create a New Client Record

Overview:

To enter a new client - **click** Contacts tab from the Ribbon, then select New/Edit Clients.



In the client code field, enter the client code and **press** <TAB> to advance to Client Name, type in the name of the new client. **Press** <TAB> to move on to the information boxes to enter the date, client's phone and fax number, and the client's A.B.N. information. The "Employee Name" field defaults to the employee number assigned to the USER number who is logged onto OPTO and is entering the Client's information. Ensure to **click** on the 'Active' box to make the new client active. Select the payment terms for the client by **clicking** one of the radio buttons, and continue completing the client's details, **press** <F9> to save to save the record.

A screenshot of the 'Clients' form. The form is titled 'Clients' and has a tabbed interface. The 'Details' tab is selected. The form contains the following fields:

- Client Code: BANDRILL
- Client Name: Bandicoot Drilling Pty Ltd
- Part Prefix: (empty)
- Tax Code: 2
- ABN: ABN
- Date Entered: 09/05/2012
- Phone No: 07 5552 2225
- Fax No: (empty)
- Employee: 32
- Employee Name: Larry Moreton
- Active:
- ABN: 99 123 456 789
- Postal Address: Address Line 1: PO Box, Address Line 2: (empty), City: CAPALABA, State / Postcode: QLD 4157
- Delivery Address: Address Line 1: 2 Smith Street, Address Line 2: (empty), City: CAPALABA, State / Postcode: QLD 4157
- Country: AUS (AUSTRALIA), Currency: (empty), Head/Branch: Head
- Email: sheridan@itmsystems.com.au, Web Site: (empty)
- Payment Terms: C.O.D. (radio), 7 Days (radio), 14 Days (radio), 30 Days (radio), Other (radio) with value 1 and Day of Month After EOM.
- EXONet: (empty), Cat (A): (empty), Cat (B): (empty), Sales ID: (empty), Owner ID: (empty), Cnt/P: 2, Balance Due Days: 30

At the bottom, there is a table with columns: Contact Name, Email, Phone No, Mobile No, Fax No, Position, Del. The table contains one row: Barry Best, sheridan@itmsystems.com.au, (empty), (empty), (empty), Owner, (empty).

Delivery Info tab enables the USER to record alternate delivery and invoice addresses for the client. Materials and Parts for this client can also be recorded as well as any discounts that may apply.

I/D	Company Name	Address Line 1	Address Line 2	City	State	PCode	Del Phone
1	D Bandicoot Drilling	25 Mains Road		MORANBAH	QLD		
2	D Bandicoot	5 South St		BLACKWATER	QLD		
3	D BD	101 North Rd		EMERALD	QLD		

The Client Info tab enables the USER to record text that can be displayed on job tickets and invoices for that client. The Client's 'Export Name' is automatically generated when the client name field is completed and the record is saved. This is the name that is used when invoices are exported to your accounting system. The Export Name and Acc Code **MUST** be identical to the corresponding client record in your accounting system.

The Credit Information fields enable a credit limit to be applied to a client and a Credit Stop (On Hold) function if they should exceed their credit limit ([See Credit Stop and Credit Limit function](#)).

The email (Invoice) and Fax No (Invoice) boxes records the client's preference in relation to how they are to receive their invoices, **click** to tick the selected method box and enter email address or fax number. If the client wishes to have their invoices to be delivered via the post, leave these boxes un-ticked. The (3) Despatch Stop Secure feature is to prevent un-authorized despatches to designated clients, or will prevent a despatch unless authorised by employee password. (See [Set-up Despatch Stop, Secure by Client](#))

Period	Balance
Period 1:	\$579.70
Period 2:	\$25,190.71
Period 3:	\$0.00
Period 4:	\$0.00
Period 5:	\$0.00
Period 6:	\$0.00

The More Info tab has areas to record Alert Message Text for the order book, quotes, despatches and transport information. To select the Default Transport Company **press** <F2> and select from the pop-up list, **click** on **OK**. The File Attachments area enable the USER to attach files in relation to the client, this could be copies of credit agreements, profile of the client's company, delivery instructions, etc. To attach a file in this area, **click** in the Description area and type in a description of the file, then **press** <TAB> to move on to the Filename field and **press** <F2> to browse your computer for the file you wish to attach. **Click** on the file name to highlight and **click** on Open button, the file name and path are now stored in this area.

Client Code: BANDRILL Client Name: Bandicoot Drilling Pty Ltd Part Prefix: Tax Code: 2 ABN

Details Delivery Info Client Info **More Info** Orders Jobs Quotes Parts Invoices Financial Hist Notes QMS

Alert Message Text:

Order Book: Alert to appear when entering a Orders

Quote: Alert to appear when entering a Quote

Despatch: Alert to appear when Despatching an Oder

Transport: Alert to appear when selectinga Transport Method

Exclude (Warehouse Transfer) Last Order Date: 24/01/18 Last Quote Date: 20/05/15 Laser Auto No: Mat/Mark: 1.00 Pro/Mark: 1.00

No Awaiting Required (If Used) Default Transport Company: Transport Account Code: Allow up to 10 Price Breaks in Parts

File Attachments:

	Description	Filename
1	Drawing	Z:\OPTO\Drawings\BAND001.pdf