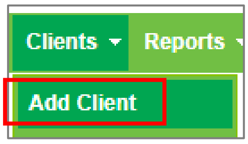
CLIENTS

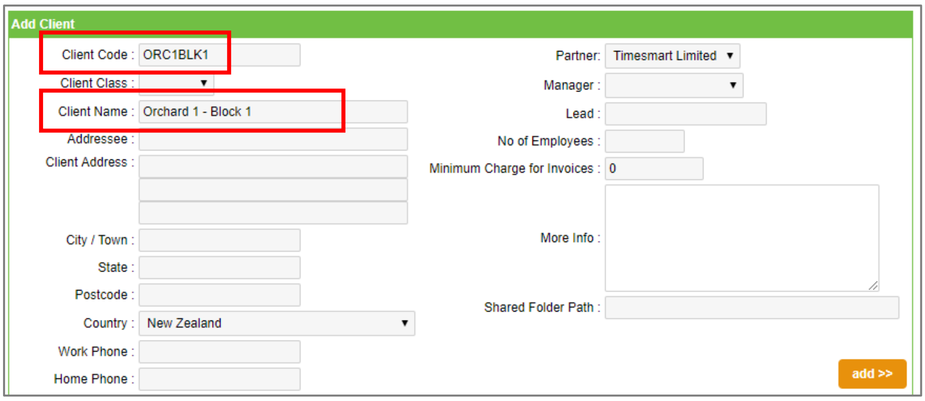
Contents

Create a Client

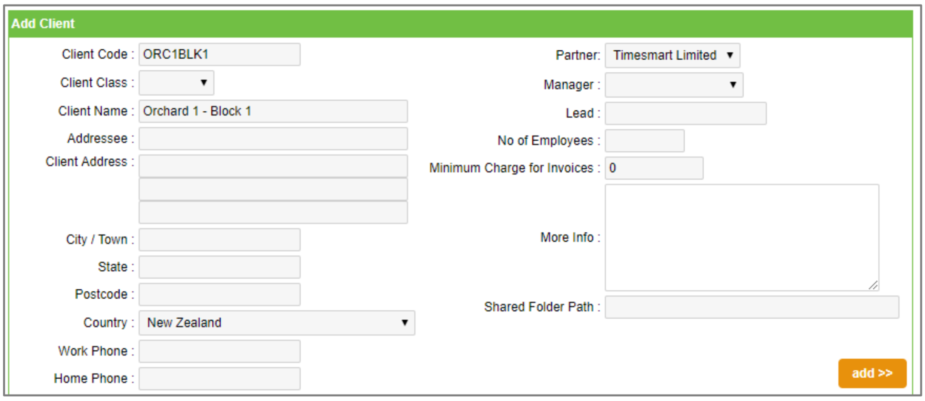
1. Hover on *Clients* and click on *Add Client*:



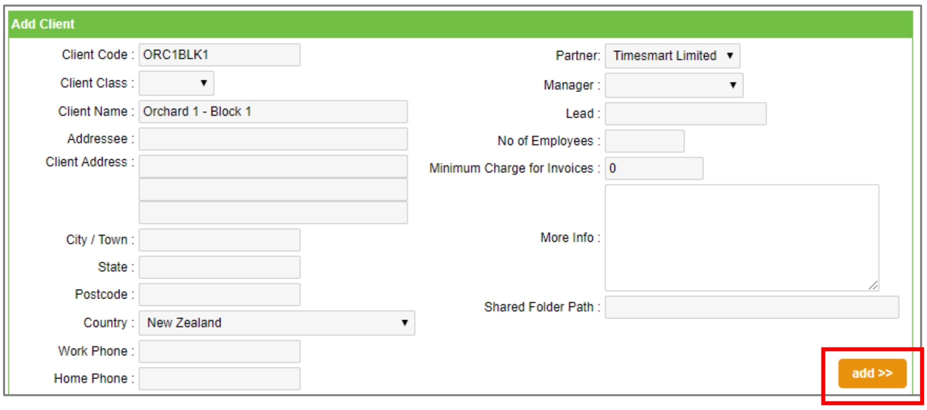
2. Enter the *Client Code* and the *Client Name*:



3. Enter any other information if applicable:

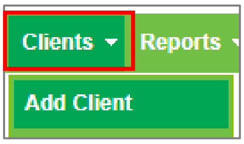


4. Click *Add*:

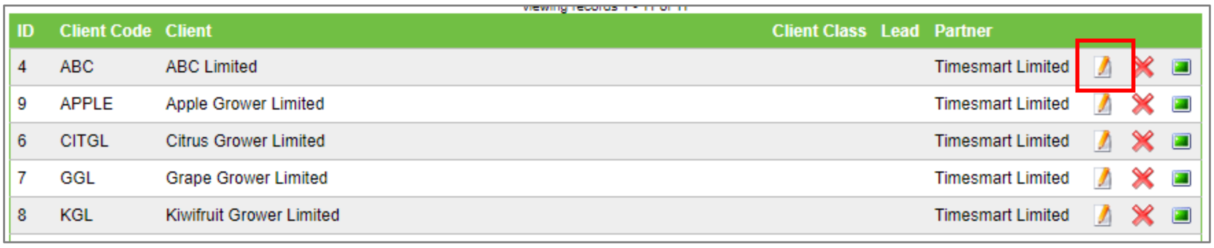


Edit a Client

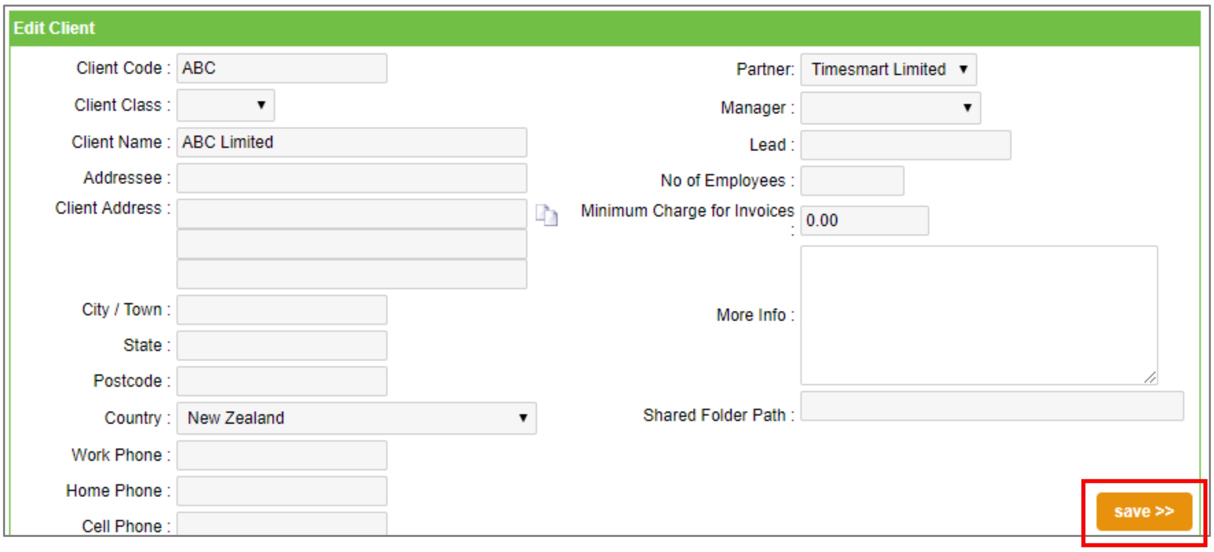
1. Click on *Clients*:



2. Click the edit icon in line with the client you want to edit:

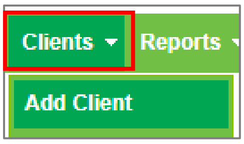


3. Make the applicable changes then click *Save*:

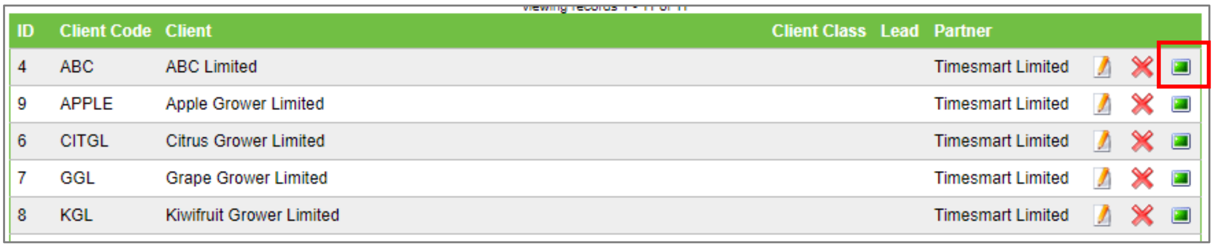


Deactivate a Client

1. Click on *Clients*:



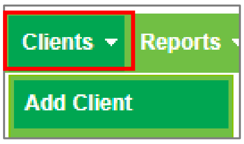
2. Click the deactivate icon in line with the client you want to deactivate:



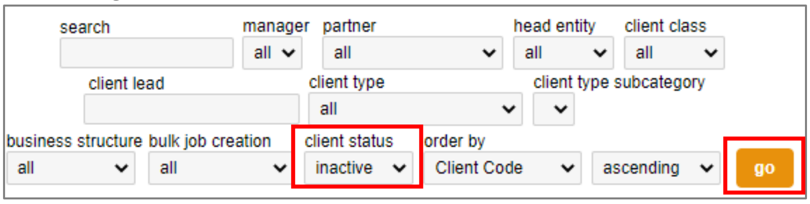
ID	Client Code	Client	Client Class	Lead	Partner			
4	ABC	ABC Limited			Timesmart Limited			
9	APPLE	Apple Grower Limited			Timesmart Limited			
6	CITGL	Citrus Grower Limited			Timesmart Limited			
7	GGL	Grape Grower Limited			Timesmart Limited			
8	KGL	Kiwifruit Grower Limited			Timesmart Limited			

Reactivate a Client

1. Click on *Clients*:



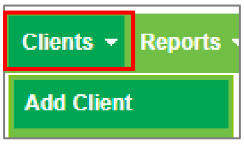
2. Change *Client Status* from *Active* to *Inactive*, then click *GO*:



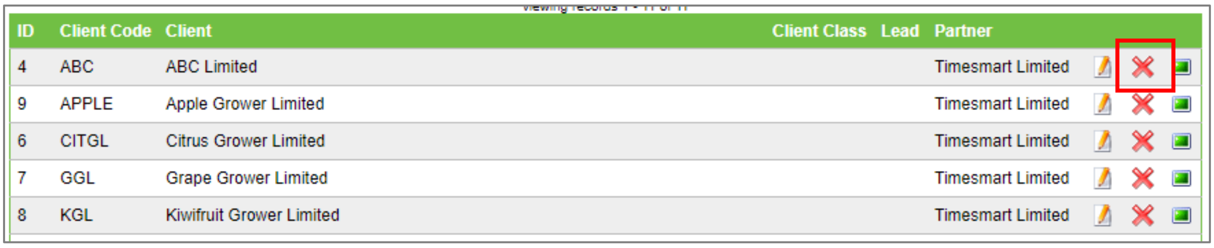
3. Click the reactivate icon in line with the client you want to reactivate:

Delete a Client

1. Click on *Clients*:

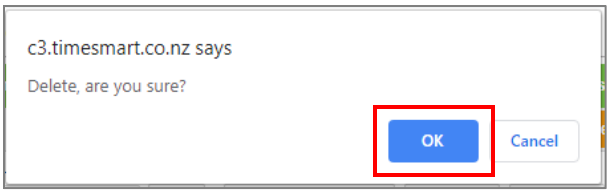


2. Click on the delete icon in line with the client you want to delete:



ID	Client Code	Client	Client Class	Lead	Partner
4	ABC	ABC Limited			Timesmart Limited
9	APPLE	Apple Grower Limited			Timesmart Limited
6	CITGL	Citrus Grower Limited			Timesmart Limited
7	GGL	Grape Grower Limited			Timesmart Limited
8	KGL	Kiwifruit Grower Limited			Timesmart Limited

3. Click *OK*:



Please note, if a Client has had a Job assigned to it, you will not be able to delete it: