

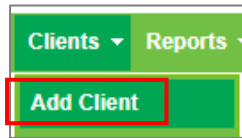
CLIENTS

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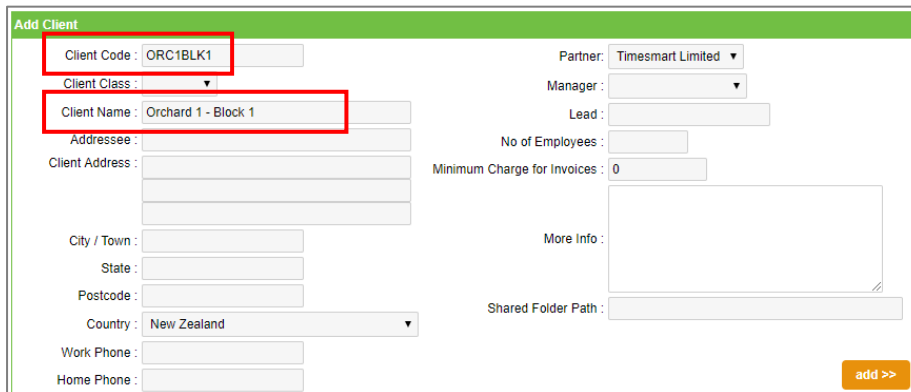
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Create a Client

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

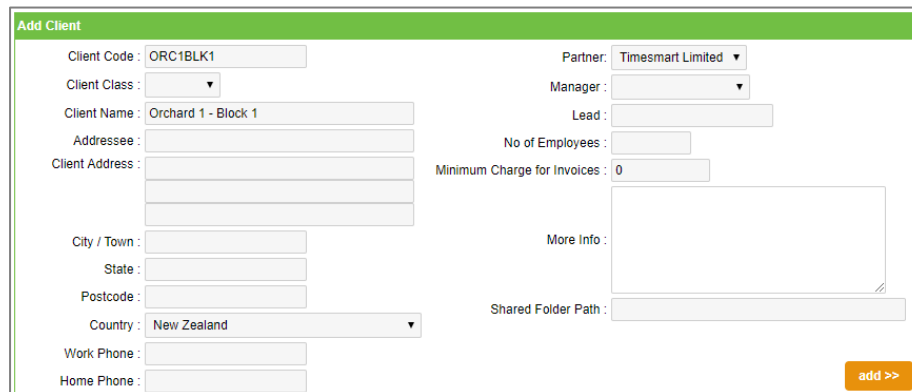


2. Enter the *Client Code* and the *Client Name*:



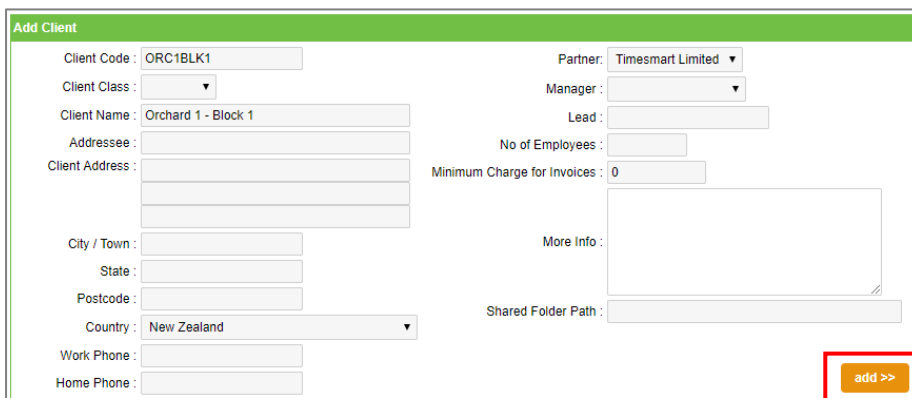
A screenshot of the 'Add Client' form. The form is titled 'Add Client' in a green header. It contains several input fields and dropdown menus. The 'Client Code' field is filled with 'ORC1BLK1' and the 'Client Name' field is filled with 'Orchard 1 - Block 1'. Both of these fields are highlighted with red rectangular boxes. Other fields include 'Partner' (Timesmart Limited), 'Client Class', 'Manager', 'Lead', 'Addresssee', 'Client Address', 'City / Town', 'State', 'Postcode', 'Country' (New Zealand), 'Work Phone', 'Home Phone', 'No of Employees', 'Minimum Charge for Invoices' (0), 'More Info', and 'Shared Folder Path'. An 'add >>' button is located at the bottom right.

3. Enter any other information if applicable:



A screenshot of the 'Add Client' form, identical to the previous one, but with all fields filled. The 'Client Code' is 'ORC1BLK1', 'Client Name' is 'Orchard 1 - Block 1', 'Partner' is 'Timesmart Limited', 'Country' is 'New Zealand', and 'Minimum Charge for Invoices' is '0'. The 'add >>' button is visible at the bottom right.

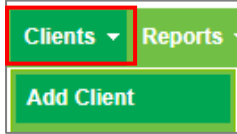
4. Click *Add*:


















A screenshot of the 'Add Client' form, identical to the previous ones, but with the 'add >>' button highlighted by a red rectangular box, indicating the final step of the process.

Edit a Client

1. Click on *Clients*:



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

| 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 |    |

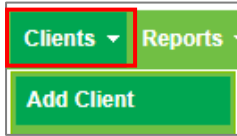
3. Make the applicable changes then click *Save*:

Edit Client
















| | | | |
|------------------|--|-------------------------------|--|
| Client Code : | <input type="text" value="ABC"/> | Partner: | <input type="text" value="Timesmart Limited"/> |
| Client Class : | <input type="text"/> | Manager : | <input type="text"/> |
| Client Name : | <input type="text" value="ABC Limited"/> | Lead : | <input type="text"/> |
| Addressee : | <input type="text"/> | No of Employees : | <input type="text"/> |
| Client Address : | <input type="text"/> | Minimum Charge for Invoices : | <input type="text" value="0.00"/> |
| | <input type="text"/> | More Info : | <input type="text"/> |
| City / Town : | <input type="text"/> | Shared Folder Path : | <input type="text"/> |
| State : | <input type="text"/> | | |
| Postcode : | <input type="text"/> | | |
| Country : | <input type="text" value="New Zealand"/> | | |
| Work Phone : | <input type="text"/> | | |
| Home Phone : | <input type="text"/> | | |
| Cell Phone : | <input type="text"/> | | |

Deactivate a Client

1. Click on *Clients*:

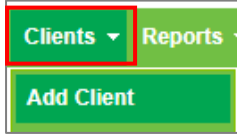


2. Click the deactivate icon in line with the client you want to deactivate:

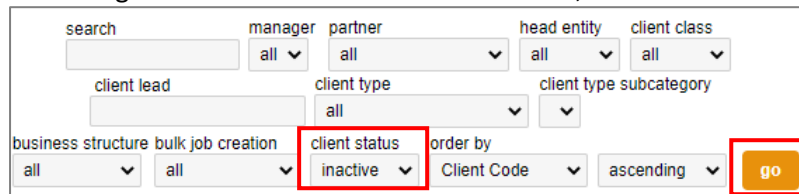
| ID | Client Code | Client | Client Class | Lead | Partner | |
|----|-------------|--------------------------|--------------|------|-------------------|---|
| 4 | ABC | ABC Limited | | | Timesmart Limited |    |
| 9 | APPLE | Apple Grower Limited | | | Timesmart Limited |    |
| 6 | CITGL | Citrus Grower 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*:



The image shows a filter form with several dropdown menus and a search field. The 'client status' dropdown is set to 'inactive' and is highlighted with a red border. The 'go' button is also highlighted with a red border.

| | | | | |
|----------------------|-------------------|-------------------------|-------------|--------------|
| search | manager | partner | head entity | client class |
| <input type="text"/> | all | all | all | all |
| client lead | client type | client type subcategory | | |
| <input type="text"/> | all | | | |
| business structure | bulk job creation | client status | order by | |
| all | all | inactive | Client Code | ascending |
| | | | | go |

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

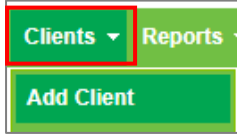


The image shows a table with columns for ID, Client Code, Client, Client Class, Lead, and Partner. The first row contains the client 'Apple Grower Limited' with ID 7. A red box highlights the reactivate icon (a square with a red 'X') in the rightmost column of the first row.

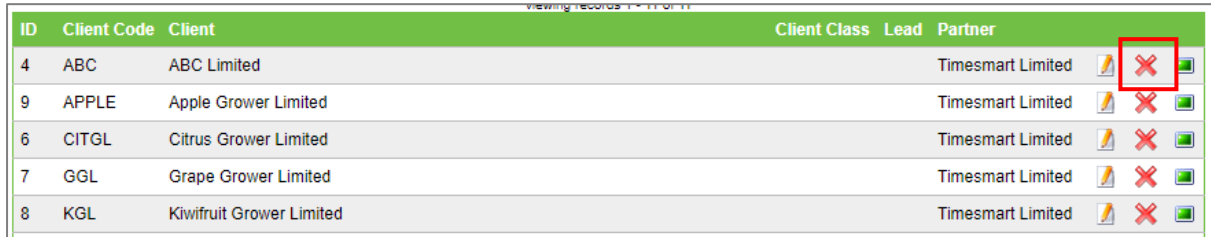
| ID | Client Code | Client | Client Class | Lead | Partner |
|----|-------------|----------------------|--------------|------|-------------------|
| 7 | AGL | Apple Grower Limited | | | Timesmart Limited |

Delete a Client






1. Click on *Clients*:



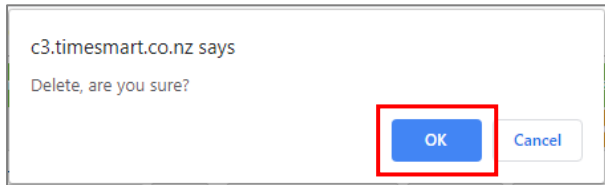
2. Click on the delete icon in line with the client you want to delete:



The screenshot shows a table with the following columns: ID, Client Code, Client, Client Class, Lead, Partner, and a set of action icons. The first row is highlighted, and a red box is drawn around the delete icon (a red 'X') in the action icons column.

| 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:

