

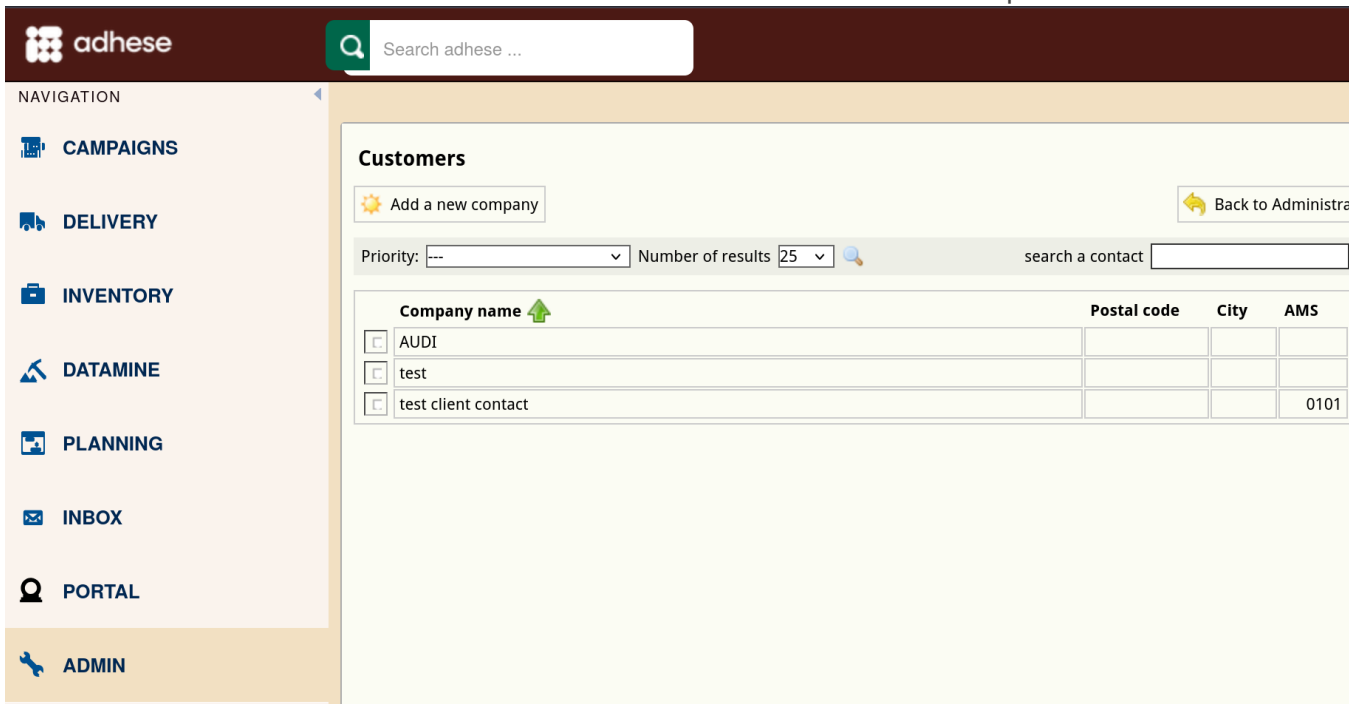
Clients

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. At the top is a dark red header with the Adheses logo and a search bar. Below the header is a navigation sidebar on the left with icons and labels for CAMPAIGNS, DELIVERY, INVENTORY, DATAMINE, PLANNING, INBOX, PORTAL, and ADMIN. The main content area is titled 'Customers' and features a yellow background. It includes a button 'Add a new company' with a gear icon, a 'Back to Administration' button with a left arrow, and a search bar labeled 'search a contact'. Below these are filters for 'Priority' (a dropdown menu) and 'Number of results' (a dropdown menu set to 25). A table displays a list of companies with columns for 'Company name', 'Postal code', 'City', and 'AMS'. The table contains three rows: 'AUDI', 'test', and 'test client contact'. The 'test client contact' row has the value '0101' in the 'AMS' column.

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:

 adheses

 Search adheses ...

NAVIGATION

 CAMPAIGNS

 DELIVERY

 INVENTORY

 DATAMINE

 PLANNING

 INBOX

 PORTAL

 ADMIN

Add a new company

 Add a new contact

 Back to list

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

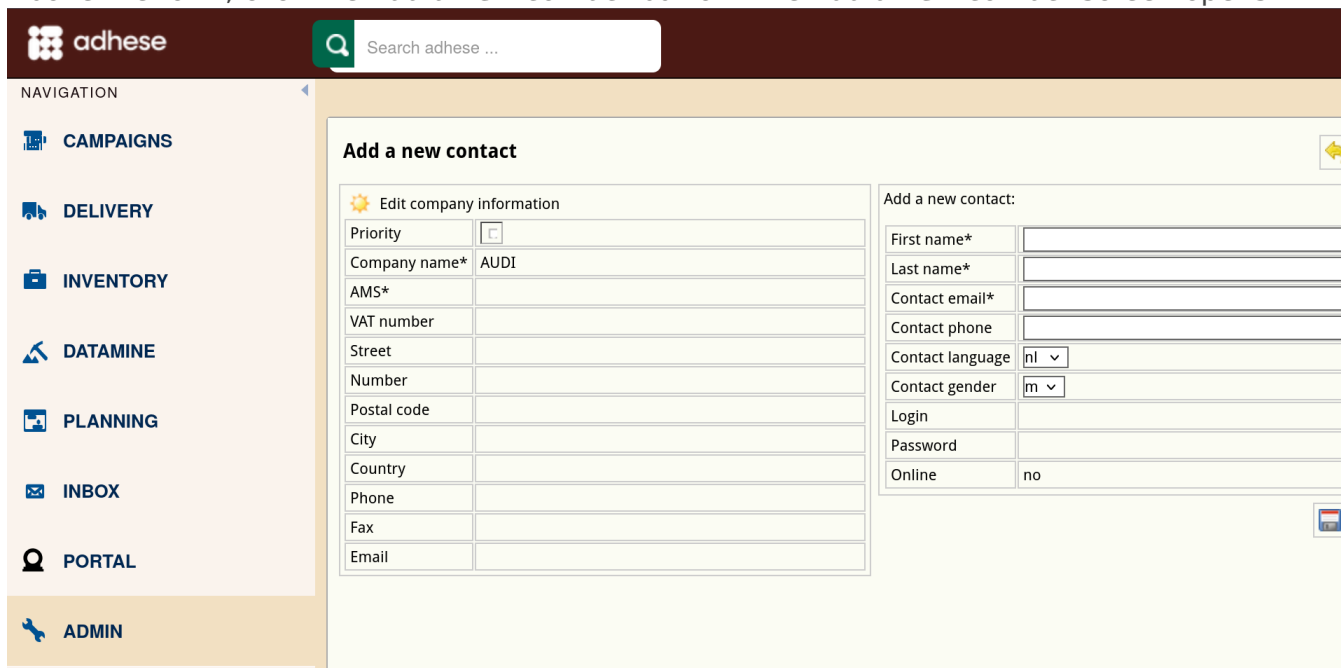
 Save

- 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:



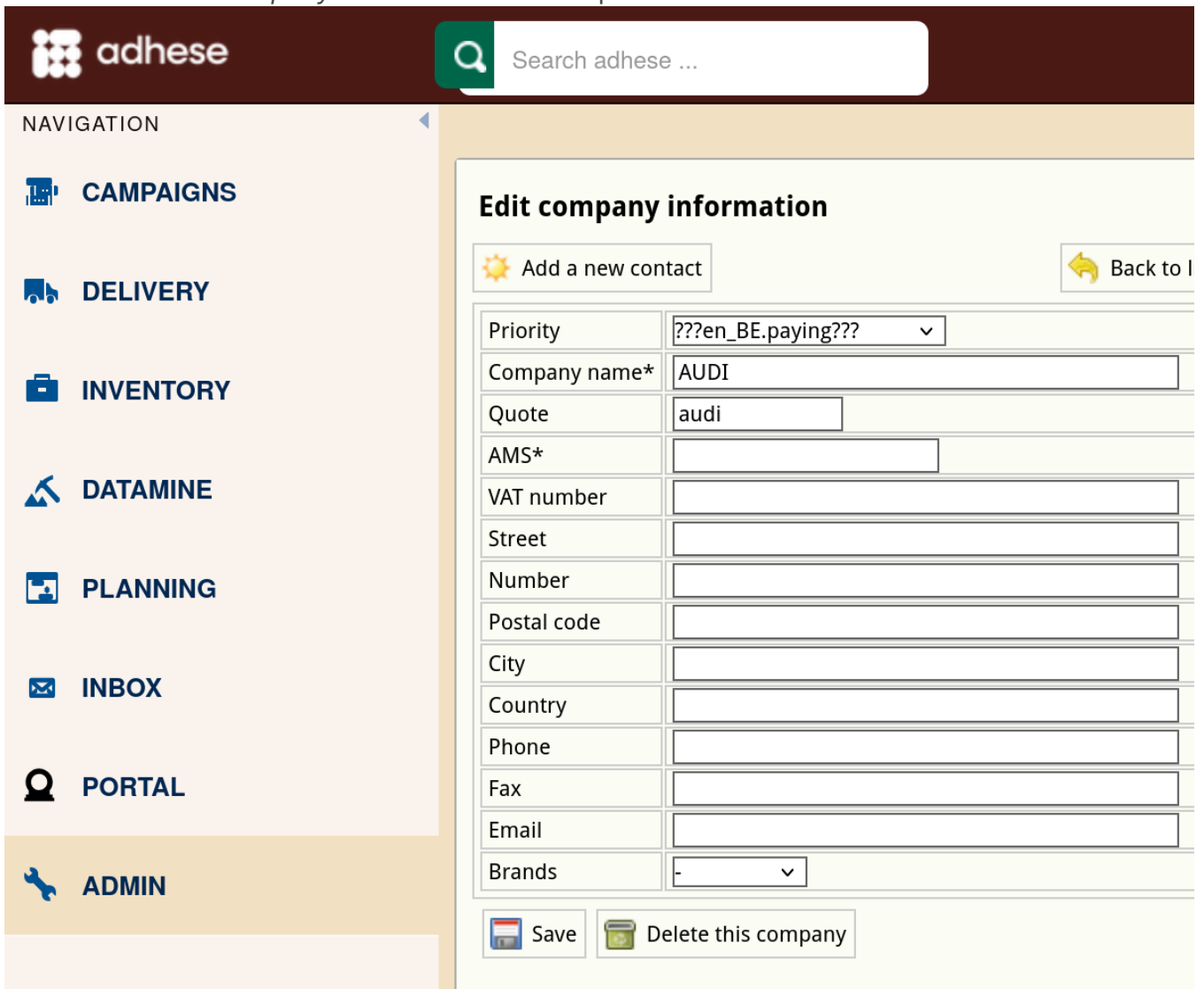
4. Define the following details:
 1. Enter the name of the contact in the **First name** field.
 2. Enter the surname of the contact in the **Last name field**.
 3. Enter the email address of the contact in the **Contact email** field.
 4. (Optional) Enter the phone number of the contact in the **Contact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

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.

Revision #2

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