

Company Management

- [Creating a New Company](#)
- [Registering a Company](#)
- [Setting a Company's Credit Limit](#)
- [Credit Limit vs Shop Balance](#)
- [Merging / Absorbing 2 Companies into 1](#)

Creating a New Company

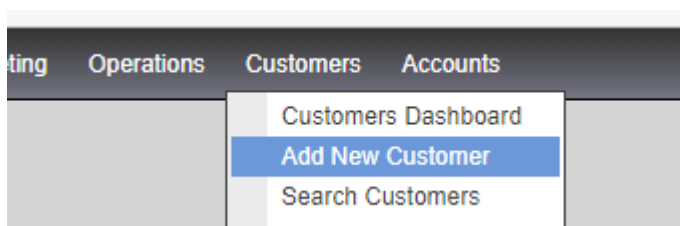
1. Open Matic Track

2. Make sure the customer has not already registered with us. If they haven't, then go to number 3.



A screenshot of the Matic Track search interface. On the left, there are two links: 'Add New Customer' and 'Search Customers'. To the right of these links is a search bar with a 'Search!' button.

3. Click on Customer and Select 'Add New Customer'

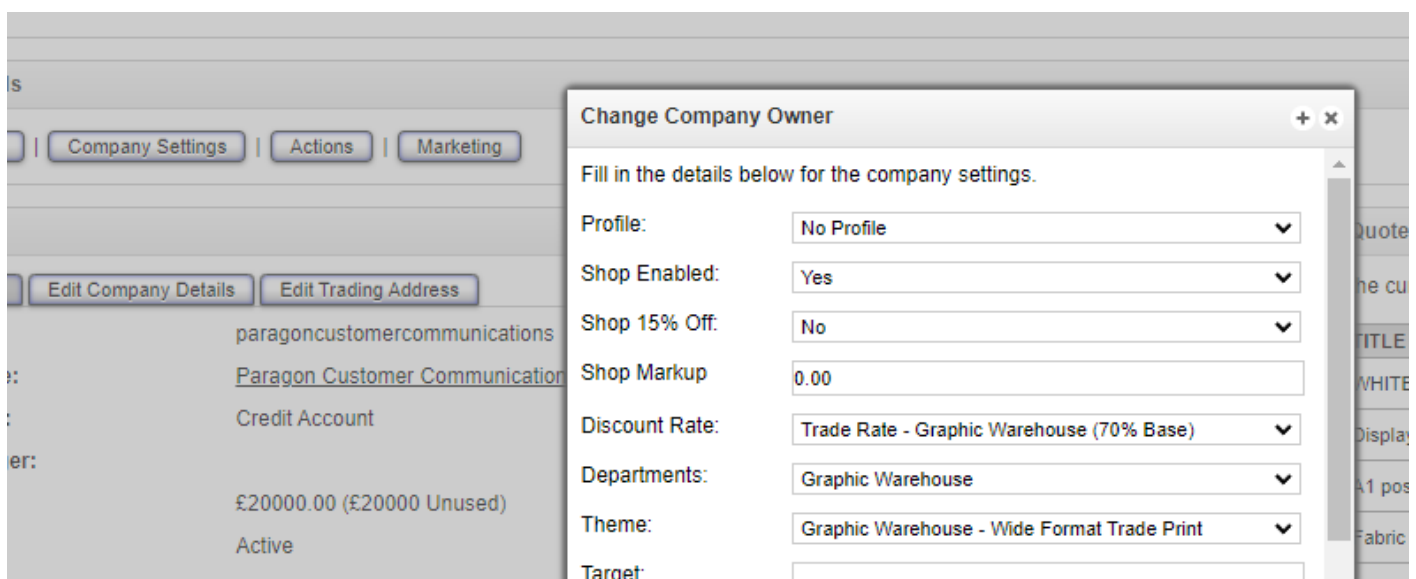


4. This will open up an address form to be completed. Please make sure the details are recorded correctly. Especially the customers name.

5. Once completed - click Save

6. This will take you to the Customer Page

7. Make sure the customer is on the correct rate. e.g. Trade Customers are on a different rate from Blue Chip companies and councils etc.



A screenshot of the Matic Track 'Change Company Owner' dialog box. The dialog box is titled 'Change Company Owner' and contains a form for company settings. The form includes the following fields:

- Profile: No Profile
- Shop Enabled: Yes
- Shop 15% Off: No
- Shop Markup: 0.00
- Discount Rate: Trade Rate - Graphic Warehouse (70% Base)
- Departments: Graphic Warehouse
- Theme: Graphic Warehouse - Wide Format Trade Print
- Target: (empty field)

The background shows a list of companies with columns for name, email, and phone number. The company 'Paragon Customer Communication' is highlighted.

8. Add in customer name, email address and telephone number to the Company Contacts section

Company Contacts

Below are the current company's related contacts |

[Add New Contact](#)

NAME	EMAIL	PHONE	MARKETING	SHOP ENABLED?	OPTIONS
Adam Pitt	adam.pitt@paragon-cc.co.uk	07760172205 Line 8	Active	Yes	⚙️ Controls

9. The customer is now registered. You can double check by selecting - Sales - New Quote and adding in the company name.

If the details appear then you have set it up correctly.

Registering a Company

Setting a Company's Credit Limit

Credit Limit vs Shop Balance

Merging / Absorbing 2
Companies into 1