

Company Management

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Creating a New Company

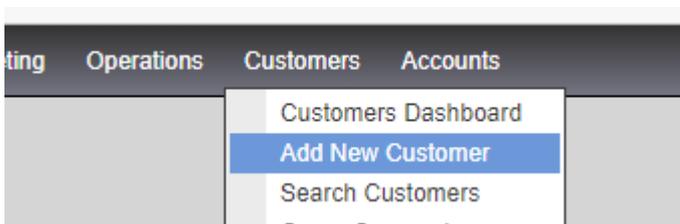
1. Open Matic Track

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



[Add New Customer](#) |
[Search Customers](#)

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

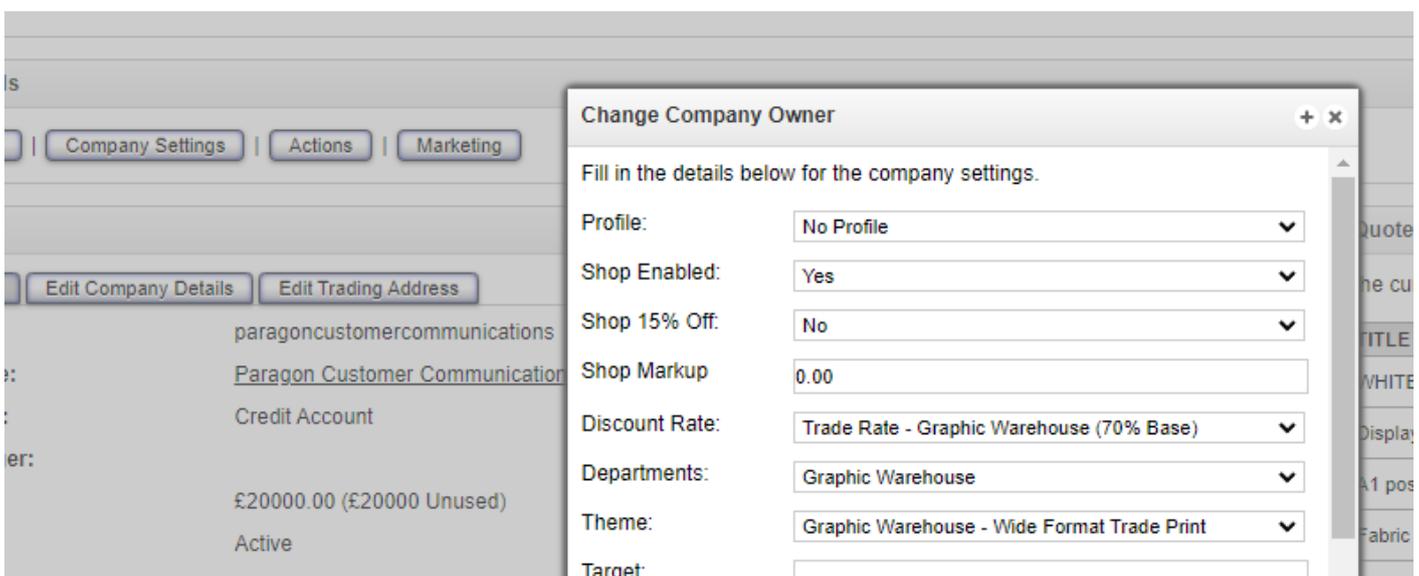


4. This will open up an address form to be completed. Please make sure the details are recorded correctly. Especially the customers name.

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.



Company Settings | Actions | Marketing

Edit Company Details | Edit Trading Address

paragoncustomercommunications
Paragon Customer Communication
Credit Account
£20000.00 (£20000 Unused)
Active

Change Company Owner
Fill in the details below for the company settings.
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:

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