

Customer Management

Overviews the procedures for creating, disabling, merging, finding and editing Companies & their associated Contacts

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Company Management

Creating a New Company

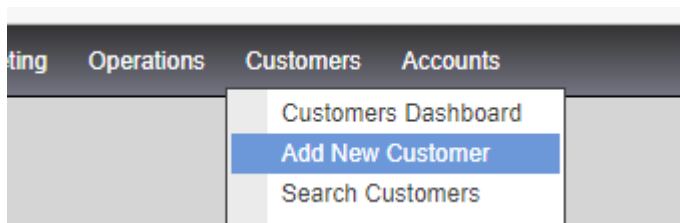
1. Open Matic Track

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



The screenshot shows a web interface with two links on the left: [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'

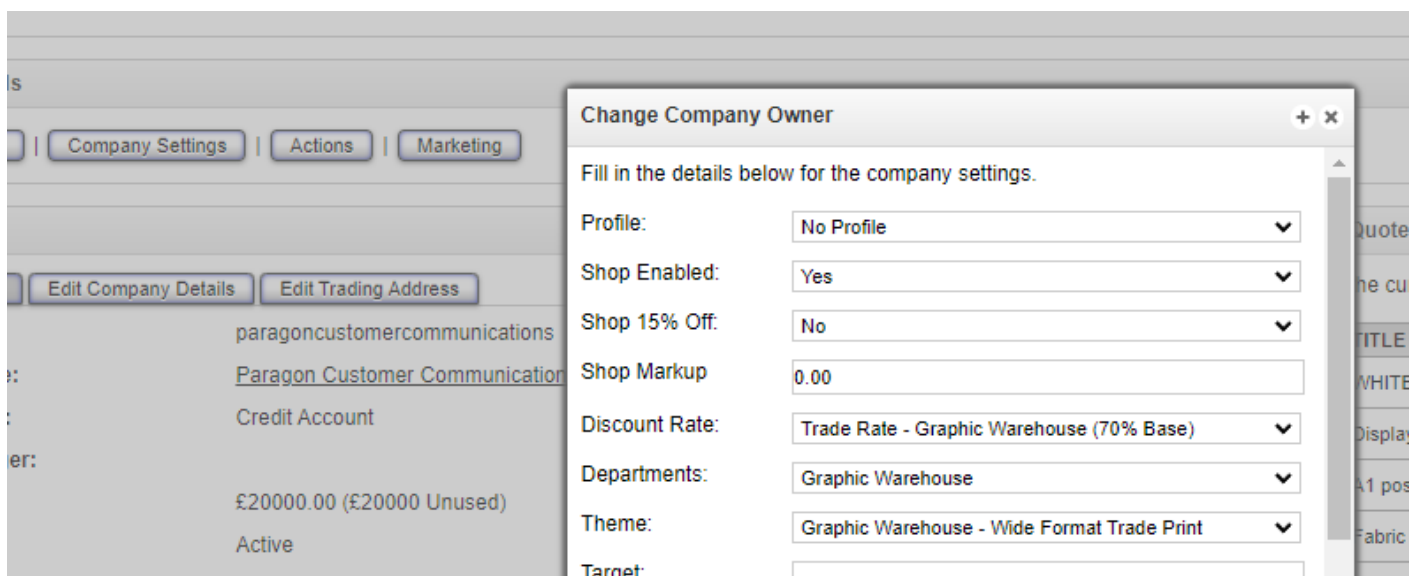


4. This will open up an address form to be completed. Please make sure the details are recorded correctly. Especially the customers name.

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.



The screenshot shows a 'Change Company Owner' dialog box. The dialog box has a title bar with a '+' and 'x' button. The main content area is titled 'Fill in the details below for the company settings.' and contains the following fields:

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

The background shows a 'Company Settings' page with buttons for 'Company Settings', 'Actions', and 'Marketing'. The 'Edit Company Details' button 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.

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CUSTOMER SERVICE DAILY REPORTS

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