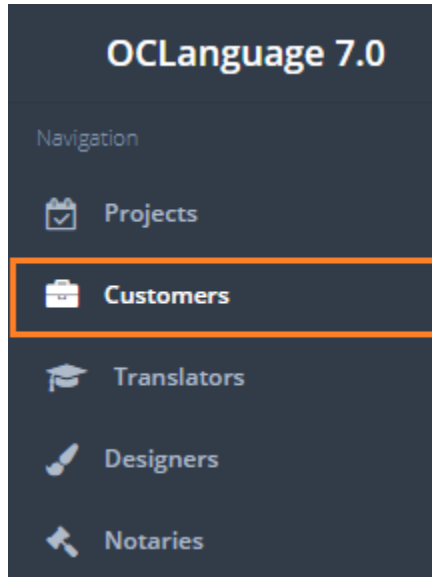


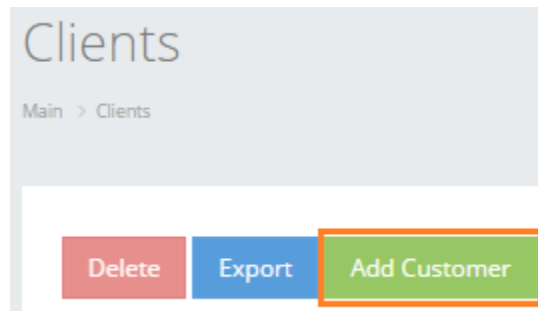
6.1. How to create a new Customer

In order to create a new Customer follow the below steps:

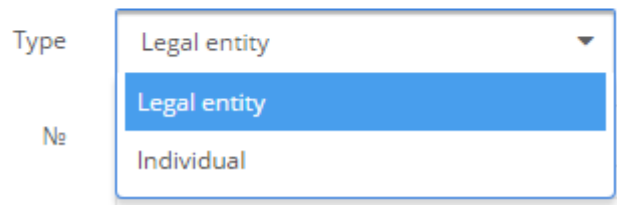
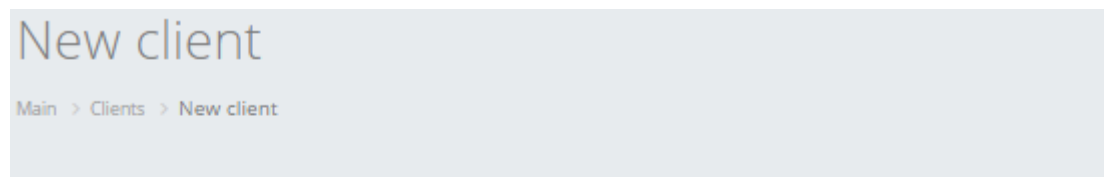
1. Browse “Customers” table



2. Click “Add Customer”



3. Register either a legal entity or an individual



4. Fill in the fields and click “Save”.

Manager Ponomarenko Ilya Vladimirovitsch ▼

Add

Comment New Customer from Vienna

Save

! The system will accept the registration of the new Customer only if all obligatory boxes are filled.

Fill in the following fields in order to register a legal entity:

Field	Description
No.	The system automatically generates a new Customer number (first available number in Customer stack)
Company name	Legal name of the company
Registration No.	Company Registration No.
VAT	Company VAT No.
Country	Country, where the company is registered/based
Actual address	Actual address of the company
Legal address	Legal address of the company
ZIP	Postal code
Contact info	Contact data of the Customer Let's stress "E-mail for invoices" field – e-mail address the system will send all invoices to. Click "Add" to add more contact data.
Contact persons	Contact persons at Customer's side Click "Add" to add more contact persons.
Requisites	Company requisites
Cooperation agreement	Mark if a cooperation agreement between the translation agency and it's Customer is signed

Confidentiality agreement	Mark if a confidentiality agreement between the translation agency and it's Customer is signed
Invoice due dates	Allowance for credited payment
Discounts	Discount amount for projects (%)
Branch	Branch where the Customer is served
Manager	Responsible manager of this Customer Click "Add" to add one more account manager
Comment	Field for making notes about the Customer

Fill in following fields in order to register an individual:

Field	Description
No.	The system automatically generates a new Customer number (first available number in Customer stack)
Name	Person's name
Surname	Person's surname
Gender	Person's gender
Personal code	Individual tax payer number
Date of birth	Person's birthday
Personal data	Person's passport number
Country	Customer's residence country
Actual address	Actual address of the person
ZIP	Postal code
Contact info	Contact data of the Customer Let's stress "E-mail for invoices" field – e-mail address the system will send all invoices to. Click "Add" to add more contact data.
Contact persons	Contact persons at Customer's side Click "Add" to add more contact persons.
Requisites	Individual's requisites
Cooperation agreement	Mark if a cooperation agreement between the translation agency and it's Customer is signed

Confidentiality agreement	Mark if a confidentiality agreement between the translation agency and it's Customer is signed
Invoice due dates	Allowance for credited payment
Discounts	Discount amount for projects (%)
Branch	Translation agency's branch, where this Customer places orders
Manager	Responsible manager of this Customer Click "Add" to add one more account manager
Notes	Field for notes on the Customer