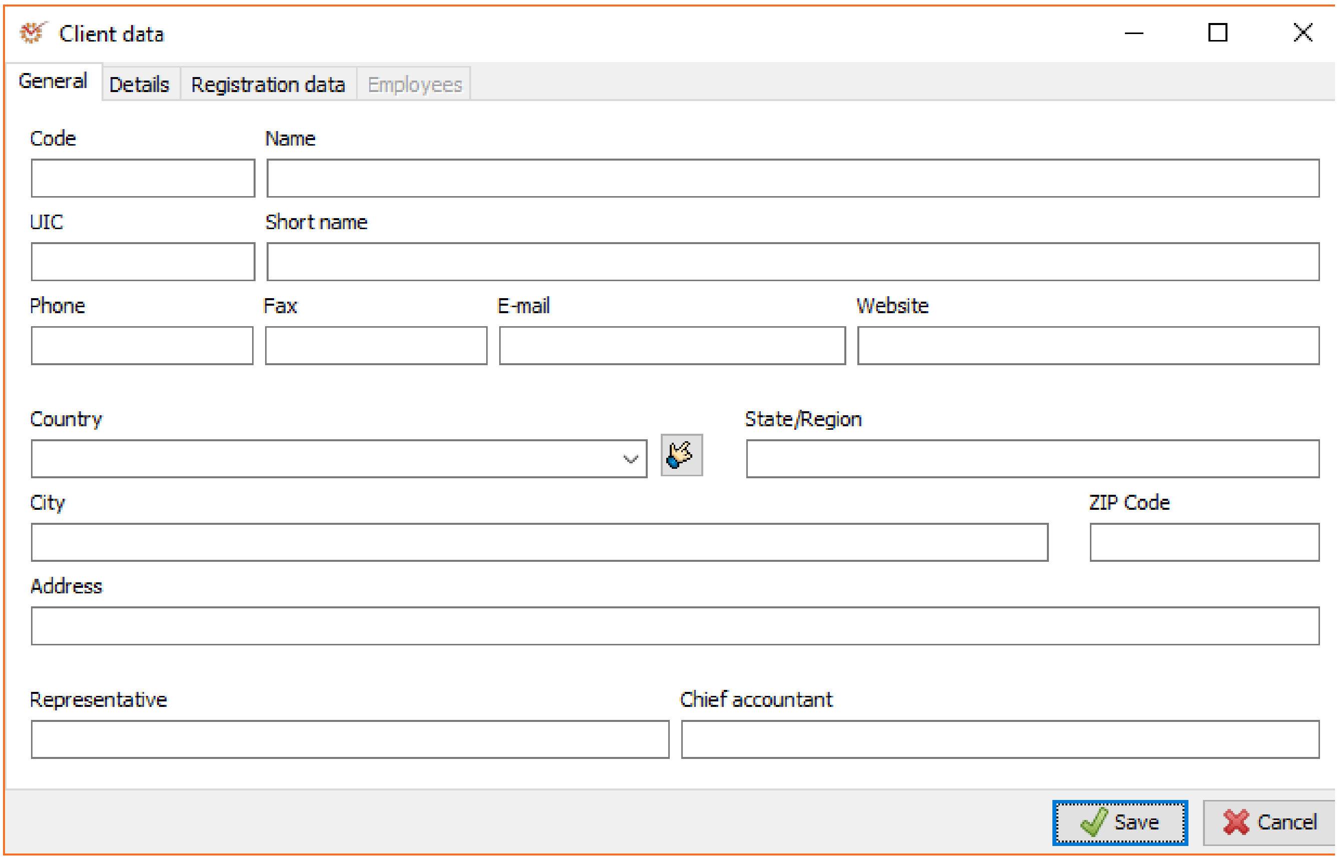
Add and Edit a Client

The window for adding a client and editing an already existing client is one and the same. You can access it in two ways:

- Open the **Home** tab → Click **Clients** → Click **Add**
- Open the **Home** tab → Click **Clients** → Click **Edit**



The client's data that you enter is grouped into several tabs. When you add a new client, some of the tabs may not be active.

General

Here you can fill in basic information about your client such as name, contacts, etc. All fields can be used when printing reports or in document parametrisation.

Note

In the **Short name** field, you can enter an abbreviation of the client's full name as per your choice.

Details

The most important parameters in this section are:

- **Supported by office** - what office supports the client. This in turn has impact on the Timesheets reports.
- **Group** - defines the client's group. It is used for a more structured organisation of the clients' nomenclature.
- **External system code** - applied during integration with another system. You must set an additional code used for client identification in the other system.

Registration data

- **VAT ID** - VAT ID of the client
- **City** - city of registration
- **Region** - region of registration
- **Address** - address of registration

Employees

A list of the client's employees, together with their contact information. It can also be used when appointing a **Responsible person** in Findings and Recommendations.

When you are done, click **Save**.