## **Customer**User guidance

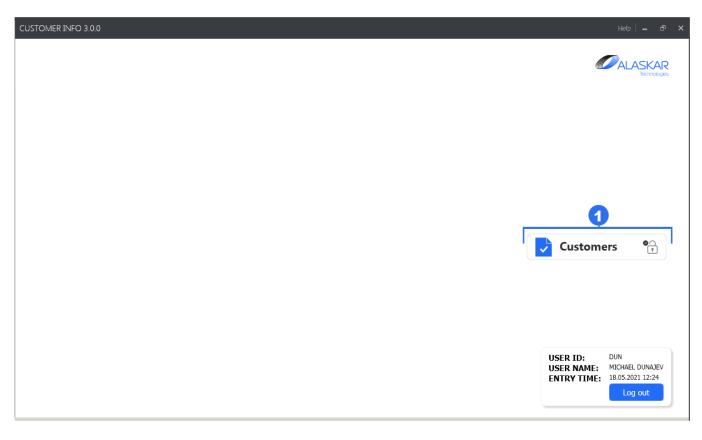


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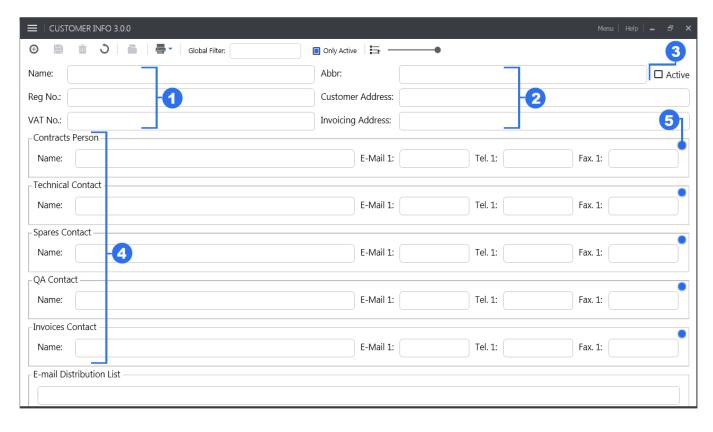


## 1. Customer Registration



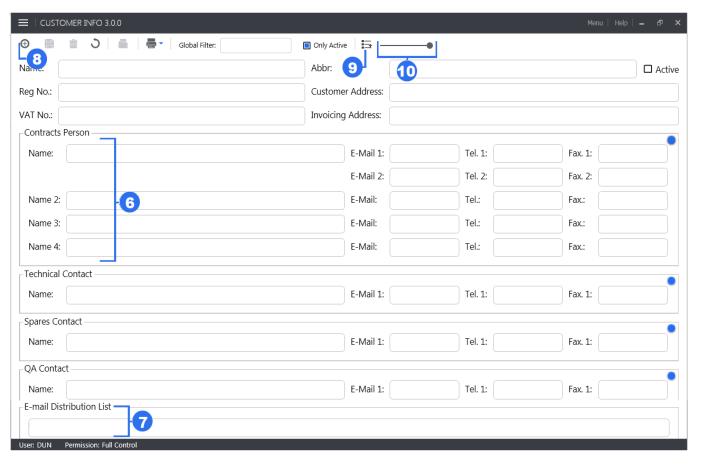
- A Customers module registers all necessary customer data.
- 1. To open customer editor press" Customer" button.





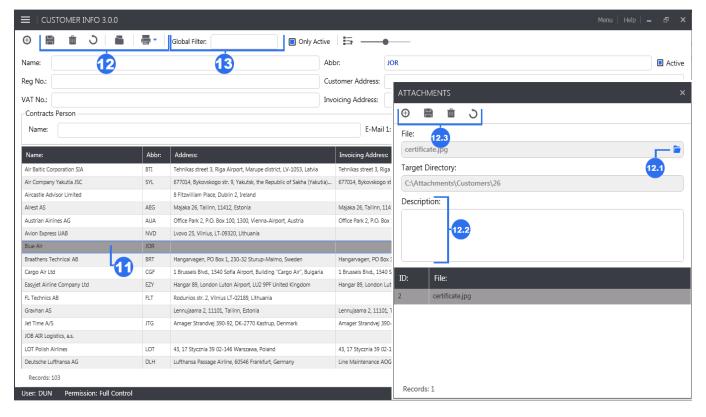
- 1. Enter in the fields the name of the organization, registration number and VAT number.
- 2. If there is, write an abbreviation. Enter customer and invoicing address.
- 3. Do not forget check box "Active".
- 4. Under your organization, you can register data such as Name, e-mail, telephone number and fax of your employees:
  - Contract Person
  - Technical Contact
  - Spares Contact
  - QA Contact
  - Invoices Contact
- 5. If you want to register the data of several employees of the same department, click on the blue circle in the upper right corner.





- 6. Now you can allow data entry of 4 employees.
- 7. Write e-mail distribution list if needed.
- 8. To add Customer data to the List click on the "Add" button ①
- 9. Press button to collapse or extend list of customers (in this example, extend).
- 10. Move the slider to the left or right to change scale of the Customer List.





- 11. Select and highlight the line.
- 12.1. Select corresponding file.
- 12.2. Enter description if needed.
- 12.3. Press ⊕ to add a file. allows you to save a change. removes a file. ⊃ reset editor.

To reset editor press . To transfer the list to excel click the "-".

13. Use "Global Filter" to find necessary customer quickly.