Companies

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What

Companies are all types of companies, except suppliers, mostly B2B customers. All invoices, vouchers, delivery bills and other important documents are linked there.

Note: If you wish, we can also automate the data import if you have many companies that you want to import. Please contact us for this.

> Before you create a new company, the following information must be stored in the system:
> Company type and departments.

Create a company

First Name: If it has an official company name, just leave the first field open and enter the company name in the next field.

Name/Company: If it does not have an official company name, just enter first name in field one and family name in field two.

Create a location

You can create multiple locations for one company and manage it here. When you create dossiers (projects) and documents later, they will be subordinated to the locations.

Create a contact

In the contact widget, you create contacts that belong to this company and location.
The best thing to do first is to create a travel agent with all the contact details.