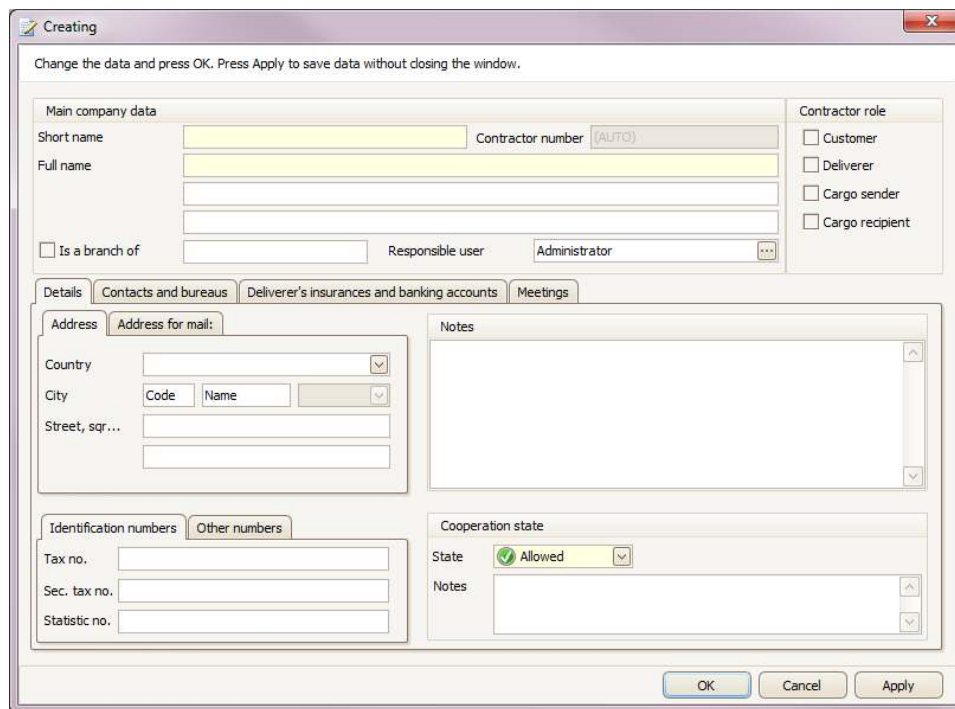


Register contractor

In order to register or issue any kind of document for some deliverer or customer it had to be registered in you database.

The easiest way to register new contractor is to use “New” button from main tool bar in Contractors module. Pressing this button EURAD will ask you if you would like to register temporary or active contractor. If you are small company and each user can register a contractor then please select active which is also selected by default. The main difference between temporary and active is that for temporary contractor you can only create offer and an order but you cannot issue an invoice.

New contractor window look like on picture below.

The image shows a software window titled "Creating" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a message: "Change the data and press OK. Press Apply to save data without closing the window." The window is divided into several sections. The top section is "Main company data" and contains fields for "Short name", "Full name", and "Contractor number" (with a dropdown set to "AUTO"). There is also a checkbox "Is a branch of" and a "Responsible user" dropdown set to "Administrator". To the right of this section is a "Contractor role" area with four checkboxes: "Customer", "Deliverer", "Cargo sender", and "Cargo recipient". Below the "Main company data" section are four tabs: "Details", "Contacts and bureaus", "Deliverer's insurances and banking accounts", and "Meetings". The "Details" tab is active and contains two sub-sections. The left sub-section is "Address" and "Address for mail:", with fields for "Country" (dropdown), "City" (with "Code" and "Name" sub-fields), and "Street, sqr...". The right sub-section is "Notes" with a text area. Below the "Address" section are "Identification numbers" and "Other numbers" tabs, with fields for "Tax no.", "Sec. tax no.", and "Statistic no.". To the right of these is a "Cooperation state" section with a "State" dropdown (set to "Allowed" with a green checkmark icon) and a "Notes" text area. At the bottom right of the window are three buttons: "OK", "Cancel", and "Apply".

As far as most of the fields are obvious we will discuss here only some of them.

Short name is the name of the contractor which will be displayed everywhere in the EURAD. So you can write whatever you want. On other side Full name is official name of the contractor which will be used on invoice printout. So be sure to enter proper Full name.

Another important field is “Contractor role”. For this field you can select if contractor is a Customer, Deliverer, Cargo sender or Cargo receiver. First two roles are most important. If you check that contractor is Customer then you will be able to issue for it offer, order and invoice but you will not be able to register an incoming invoice. To register an incoming invoice for contractor you have to check Deliverer box.

Besides this fields EURAD will ask you to select the country and tax number for the contractor. Be sure to enter proper tax number because this information is also printed on invoice printout.

After registering contractor you can use it in whole system. Please notice that sometimes contractor can be registered also from other places. For example during creation of offer on offer edit window is a button which can be used to register new contractor.

Contractor editing is performed in same window. To change some data for contractor you have to open view window of contractor and press Edit in main tool bar.

Please remember that changing data of a contractor will not have any effects on data of this contractor in already issued invoices. That means if you issued an invoice and you noticed that some data of this contractor (in this case customer) are wrong then you need to correct those data on the contractor itself and on this invoice. Because changed data on contractor will have effect only on new issued invoices.