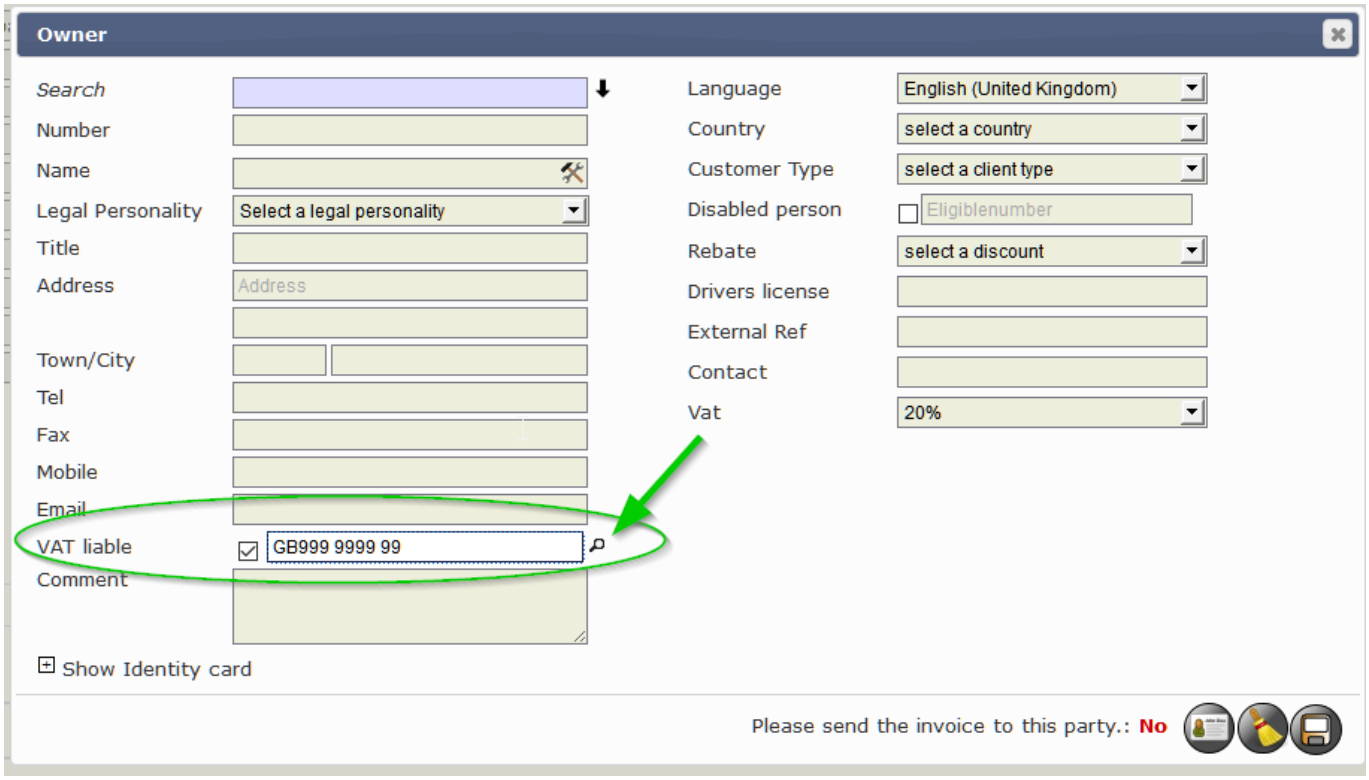
Jobs

Creating a customer through his VAT number.

You can add a customer quickly in the owner screen file level with the correct information by looking up the customer on its enterprise number (VAT number)

PlanManager will retrieve the data and fill in the appropriate fields.



Fill in the VAT number, the system will automatically do the little fixes (like adding GB). Then click on the magnifying glass next to the field.

If the registered VAT number is valid, then PlanManager will automatically load the name, address, zip code, city and title. You can now complete customer data more deeply (eg telephone number or email address). Then click, as usual, on the button to save.

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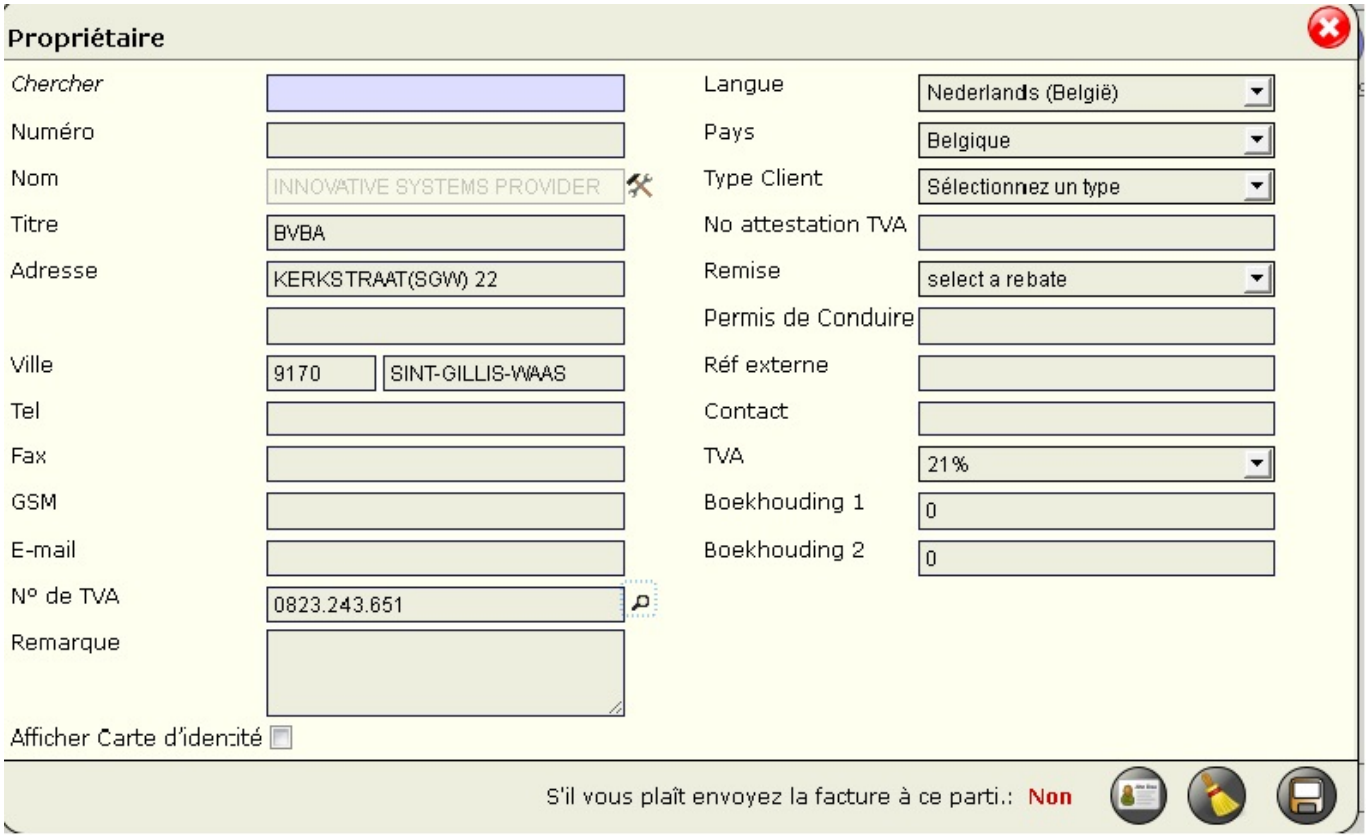
Jobs



Unique solution ID: #1574
Author: Jean-Marie
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