

**PlanningPME**

Schedule easily

Create clients

I. Description of this feature

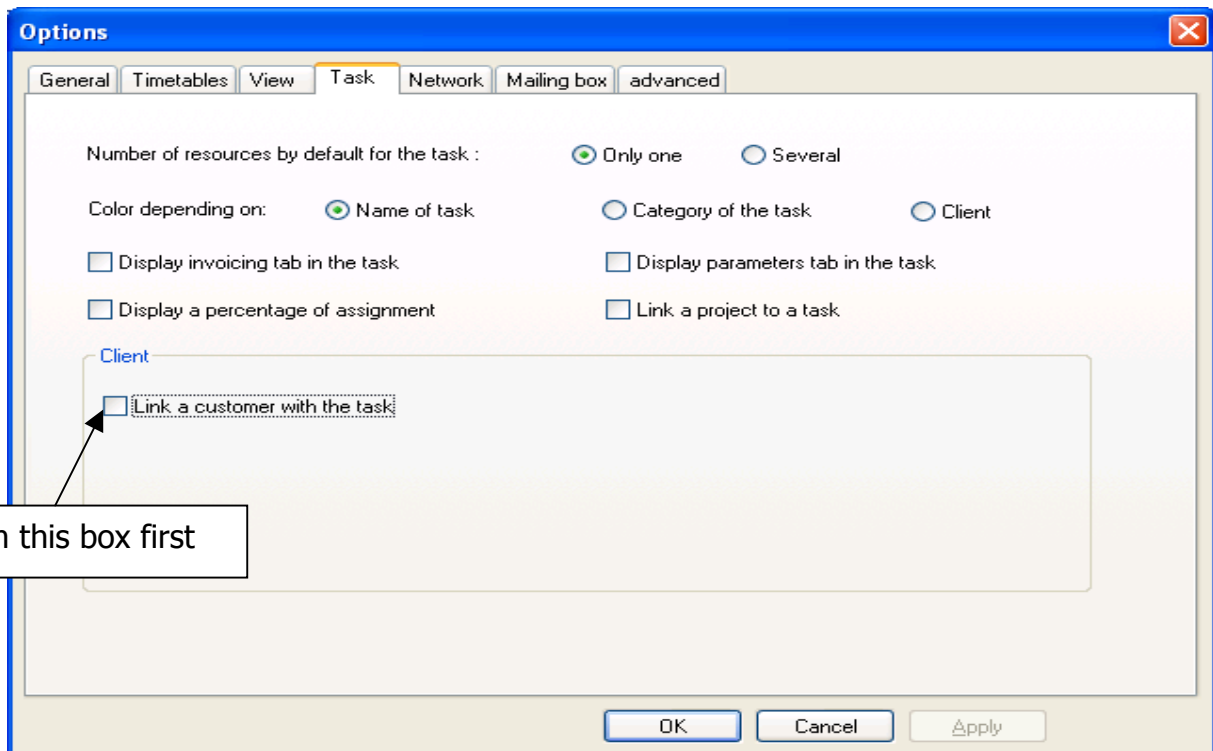
You have the possibility to add as many clients as needed and to assign a client to a task.

II. How to use this feature?

1 – Link a customer with the task

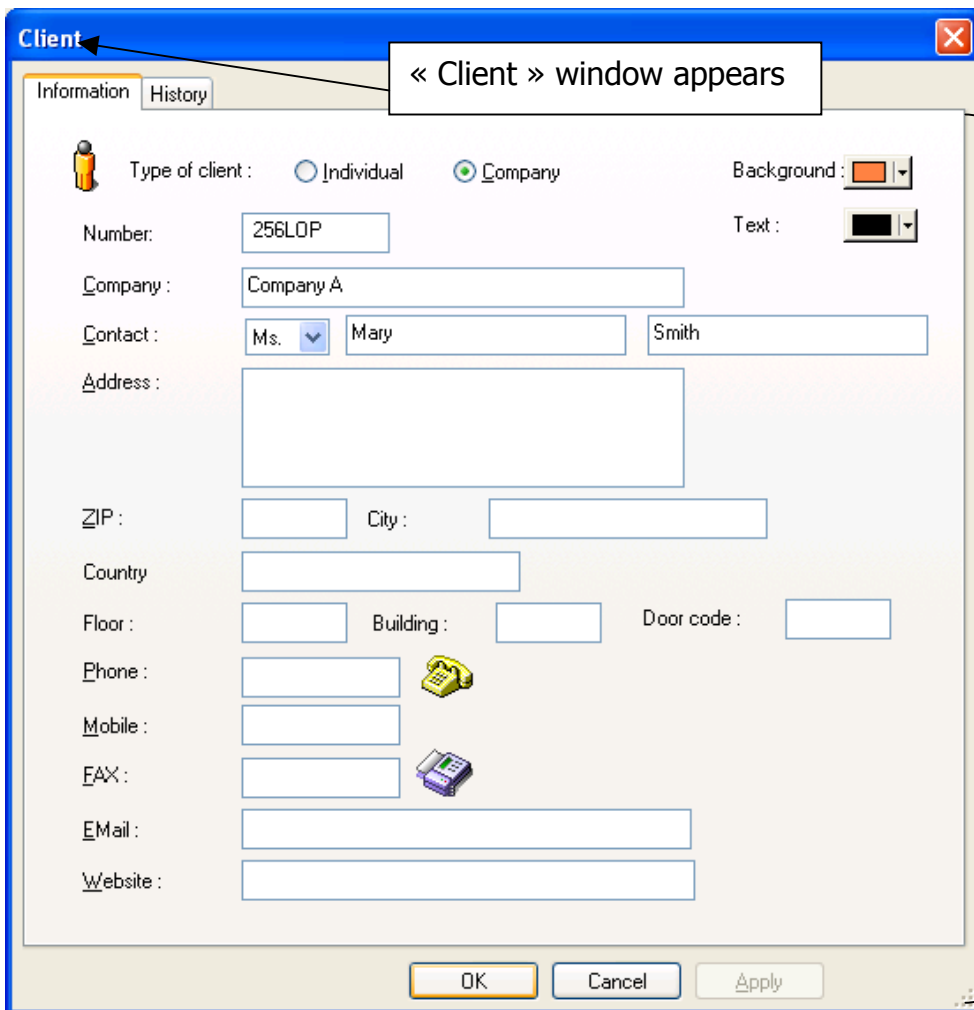
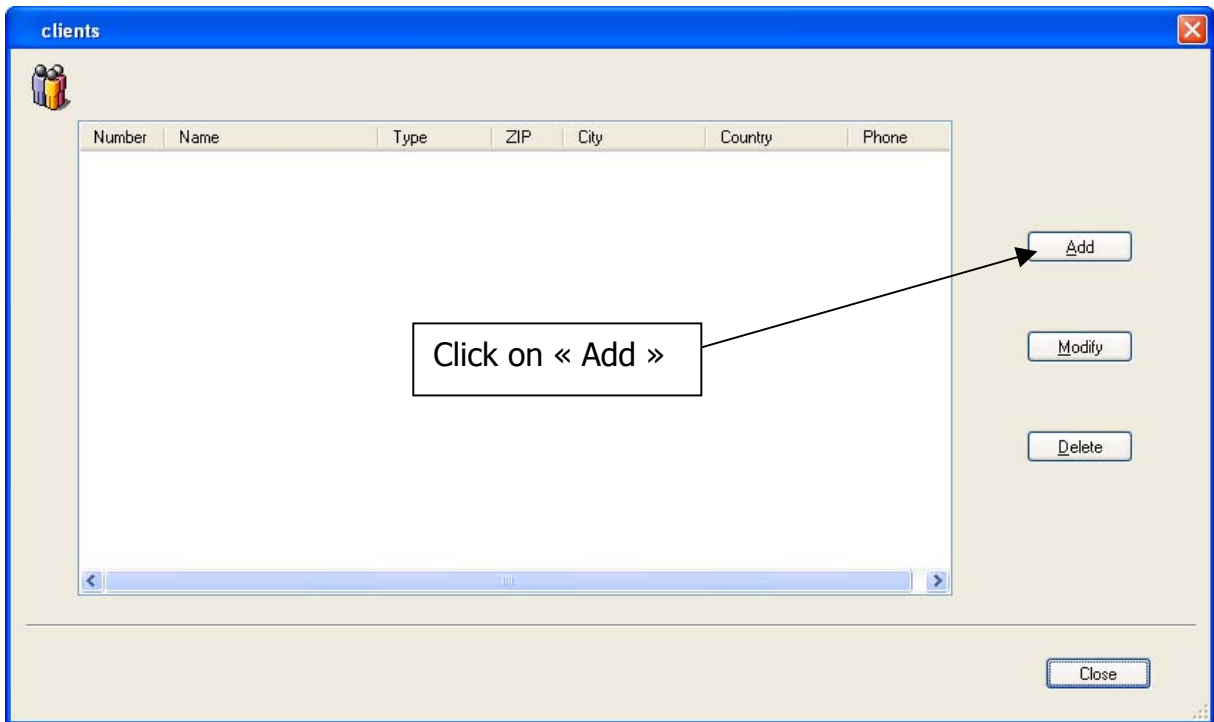
First of all, go to “Tools” -> “Options” and choose the tab “Task”

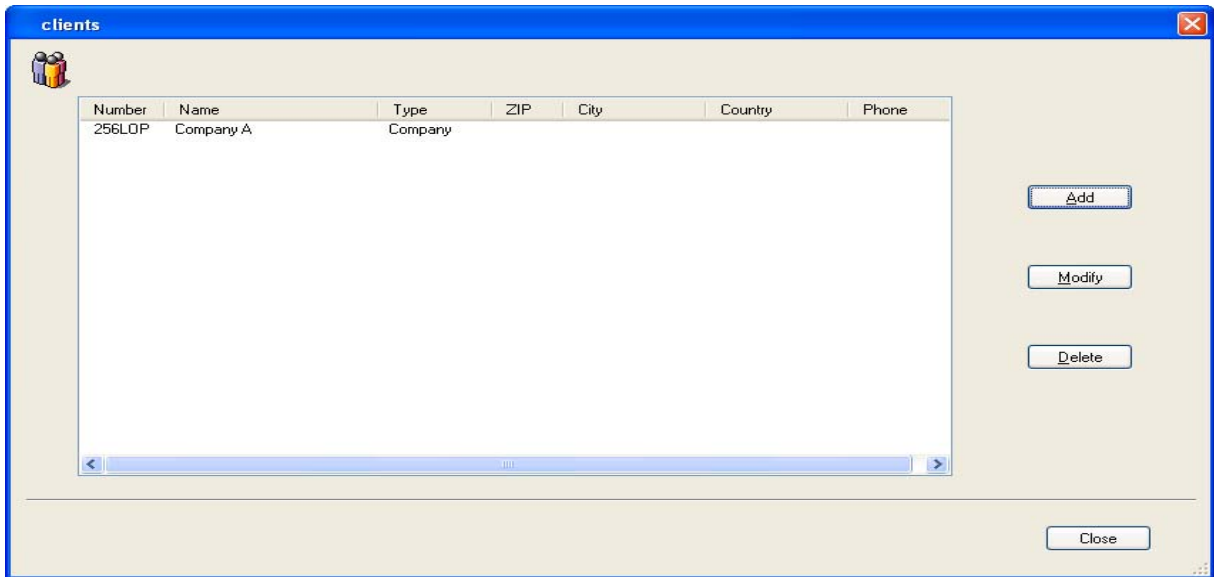
The following window appears.





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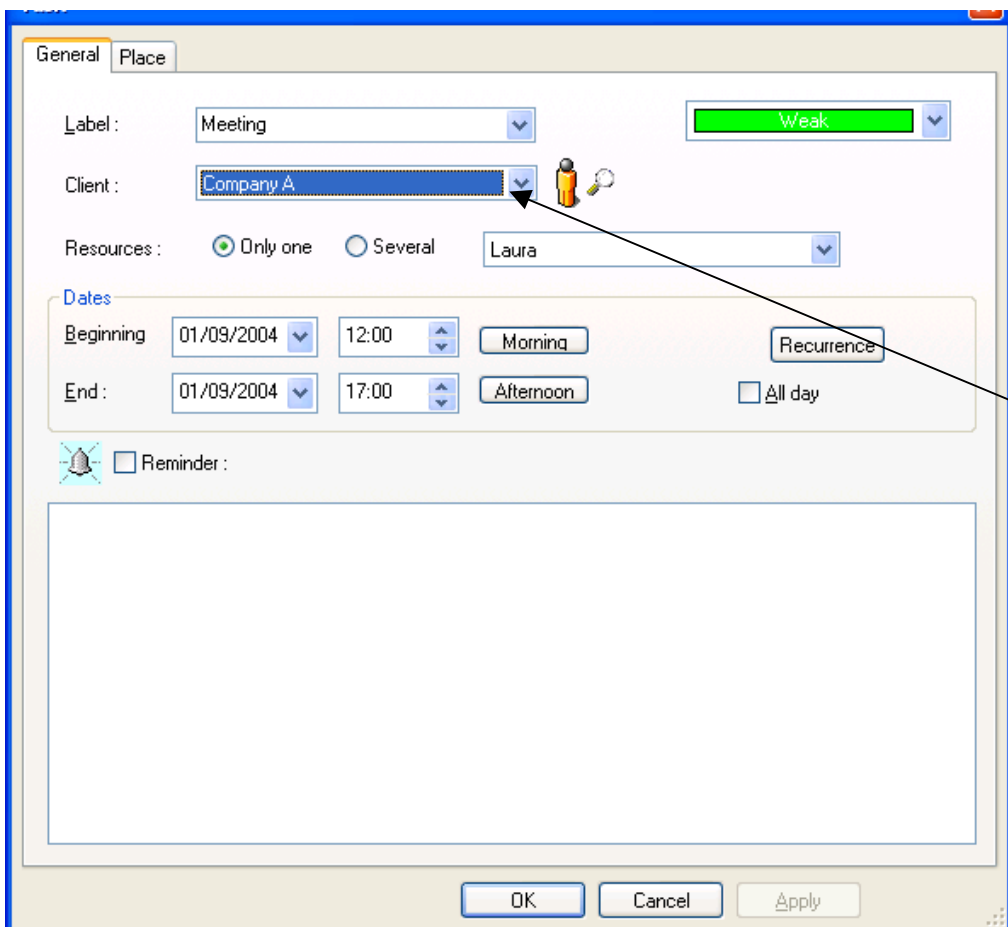




You have entered one client: the company A.
 Clicking on the “Add” button, you can enter as many clients as you like.

3- Assign a client to a task

While creating a new task, you can assign a client to this task.



Choose your client



4 - To go further...

There are many interesting possibilities once your clients entered on your schedule.

4.1. Extract from your schedule the tasks assigned to specific client(s)

To do so, play with your client filter bar on the schedule.

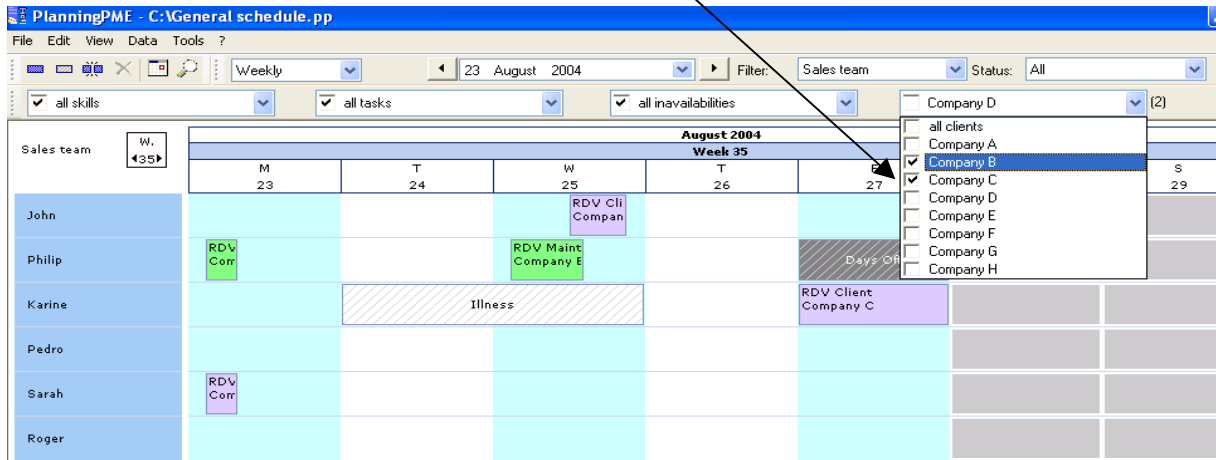
Client filter bar

Tasks of all the clients are shown

We decide to show only tasks assigning to the Company C.

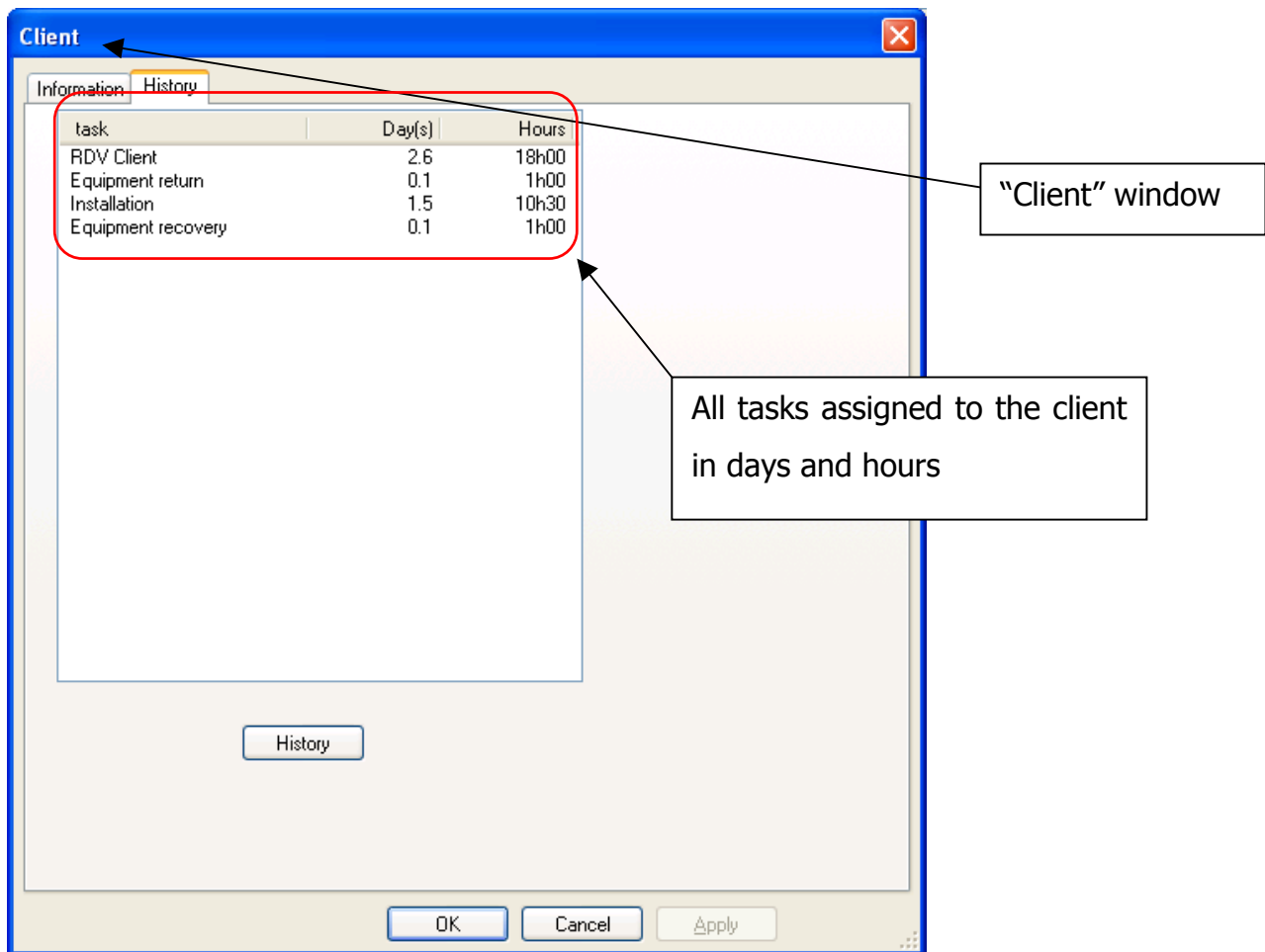


We decide to show only tasks assigning to the Company C **and** Company B



So, you can extract easily tasks of particular clients from your schedule.

4.2. Have access to the history of your clients on the “client” window.





4.3. Add additional data on the "client" window

See the card "Additional data".

4.4. Assign equipment to your client

See the card "Client equipment".

IV. Contact PlanningPME

For any help or information about the software PlanningPME, the team of TARGET SKILLS is at your entire disposal.

PlanningPME

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