

Adding a new client/representative



Adding a new client (company or person)

It is now possible to **add a new client** (a company or a person) straight from **REQUESTS/QUOTES** panel, as well as adding a client's representative.

When creating a new quote, click a **+** icon right next to the 'Requested by' field.

Requested by: **+**

Leon will show slightly different windows if a new client is a **company** and a different one if a new client is a **person** (see screenshot on the right).

Once a new client has been added it will be stored in Leon for future usage and its profile is also created in the [Phonebook](#)

New Person New Company Export to XML Export to Excel Import PAX						
Type	Client▲▼	Surname▲▼	Name▲▼	Code▲▼	Phone	Email address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
	Yes	Smith	Adam	ASM	+44 7687 1276	asmith@gmail.com
Records 1 - 1 from 1						

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