

# Sisukord

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# Kliendid

Klient on Directo mõistes kauba või teenuse tarbija. Klientidega seotakse näiteks tellimused, arved, laekumised ja paljud muud Directo dokumendid või kaardid.

## Klientide register

Klientide register asub Üldine → DOKUMENDID → **Kliendid** :



Klikkides sõnal **Kliendid** avaneb klientide register:

A screenshot of the Directo 'Kliendid' register interface. At the top, there is a toolbar with icons for 'Sule', 'Uuenda', 'Puhasta väljad', 'Vali tulbad', 'Salvesta vaade', 'Seaded', 'Printi', and 'Exceli tabel'. Below the toolbar, the title 'Kliendid' is displayed. Under the title, there is a search bar with the text 'AVA Kood' and a search icon. To the right of the search bar are two buttons: 'Lisa uus' and 'Vaata'. Below the search bar and buttons, there is a table with the following columns: 'KOOD', 'KLASS', 'NIMI', 'KONTAKT', 'AADRESS', and 'TELEFON'. The first row of the table has the following values: '1001', 'Directo OÜ', and 'Mõisa tn 4, 13522 Haabersti linnaosa, Tallinn, Harju maakond'. Below the table, there is a section with a toggle switch and the text 'Nimekiri ilmub kohe'. At the bottom, there is a section with the text 'LINK' and 'TEGEVUS', and a button 'Avab dokumendi'.

Directo klientide registris hoitakse klientide kontaktandmeid ning muid klientidega seotud ja sujuvaks tööks vajalikke atribuute. Samuti lisatakse klientide registri kaudu uusi klientide.

Olemasoleva kliendi kaardi avamiseks tuleb registris klakkida kliendi koodile ja uue loomiseks tuleb

vajutada nuppu **Lisa uus**

Esimesel juhul avaneb olemasoleva kliendi kaart vaatamiseks ning vastava õiguse olemasolul ka

muutmiseks (vt.[Kasutajaõigused](#)). Teisel juhul avaneb tühi kaart uue kliendi sisestamiseks.

## Kliendi kaart

Kliendi kaardil hoitakse ühe kliendi andmeid ja Directo tööks vajalikke atribuute:

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                  |               |                  |                       |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
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| Sule                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Uus                                              | Koopia        | Jäta             | Kustuta               | Salvesta            | Meil    | PRINT |  | F | << | >> | Olek: Muudetud | (vali tegevus) |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Uuring                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Sündmus                                          | Sündmused (0) | Värskenda andmed |                       |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| <div>Üldinfo   Kontaktid   Klassid   Tegevused   Muudatused   Muutused   Transport   Uuringud</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                  |               |                  |                       |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| <table><tr><td>Kood</td><td>1001</td><td>Klass</td><td>Objekt</td><td>Staat</td><td>Valid</td><td>Suletud</td></tr><tr><td>Nimi</td><td colspan="3">Directo OÜ</td><td>Tüüp</td><td colspan="2">Ettevõte</td></tr><tr><td>Tänav</td><td colspan="3">Mõisa tn 4</td><td>Nimi lähetusel</td><td colspan="2"></td></tr><tr><td>Indeks, linn</td><td colspan="3">13522 Haabersti linnaosa, Tallinn, Harju maakond</td><td>Lähetusnäav</td><td colspan="2"></td></tr><tr><td>Maa</td><td colspan="3"></td><td>LähetusIndeks, linn</td><td colspan="2"></td></tr><tr><td>Maakond</td><td colspan="3"></td><td>LähetusMaa</td><td colspan="2"></td></tr><tr><td>Asumaa</td><td colspan="3">EE (Eesti)</td><td>Tegevusala</td><td colspan="2"></td></tr><tr><td>Esindaja</td><td colspan="3"></td><td>Tehinguliik</td><td colspan="2"></td></tr><tr><td>Telefon</td><td colspan="3"></td><td>Faks</td><td colspan="2">Klassifik.</td></tr><tr><td>Skype</td><td colspan="3"></td><td>Hoiatus</td><td colspan="2"></td></tr><tr><td>E-mail</td><td colspan="3"></td><td>Url</td><td colspan="2"></td></tr><tr><td>Kommenta</td><td colspan="3"></td><td>Sünnipäev</td><td colspan="2">Sugu</td></tr><tr><td>Soodus %</td><td colspan="3"></td><td>Keelatud artikli</td><td colspan="2"></td></tr><tr><td>Arve tasub</td><td colspan="3"></td><td>Lubatud valem</td><td colspan="2"></td></tr><tr><td>Leping</td><td colspan="3"></td><td>Kassa-arve kiirvaliku</td><td colspan="2"></td></tr><tr><td>Kliendikaart</td><td colspan="3"></td><td>Prioriteet</td><td colspan="2">Viitenumber 5010011</td></tr><tr><td>Maksehinnang</td><td colspan="3">Halb(69067 päeva)</td><td>Haldur</td><td colspan="2"></td></tr><tr><td colspan="4"></td><td colspan="2">©-arvete vastuvõtt</td><td>Jah</td></tr></table> |                                                  |               |                  |                       |                     |         |       |  |   |    |    |                |                |  | Kood | 1001 | Klass      | Objekt             | Staat     | Valid | Suletud | Nimi  | Directo OÜ |                 |                     | Tüüp     | Ettevõte |             | Tänav   | Mõisa tn 4 |            |         | Nimi lähetusel |         |         | Indeks, linn  | 13522 Haabersti linnaosa, Tallinn, Harju maakond |  |         | Lähetusnäav |    |  | Maa |  |        |                 | LähetusIndeks, linn |  |  | Maakond |  |  |  | LähetusMaa |  |  | Asumaa | EE (Eesti) |  |  | Tegevusala |  |  | Esindaja |  |  |  | Tehinguliik |  |  | Telefon |  |  |  | Faks | Klassifik. |  | Skype |  |  |  | Hoiatus |  |  | E-mail |  |  |  | Url |  |  | Kommenta |  |  |  | Sünnipäev | Sugu |  | Soodus % |  |  |  | Keelatud artikli |  |  | Arve tasub |  |  |  | Lubatud valem |  |  | Leping |  |  |  | Kassa-arve kiirvaliku |  |  | Kliendikaart |  |  |  | Prioriteet | Viitenumber 5010011 |  | Maksehinnang | Halb(69067 päeva) |  |  | Haldur |  |  |  |  |  |  | ©-arvete vastuvõtt |  | Jah |
| Kood                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 1001                                             | Klass         | Objekt           | Staat                 | Valid               | Suletud |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Nimi                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Directo OÜ                                       |               |                  | Tüüp                  | Ettevõte            |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Tänav                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Mõisa tn 4                                       |               |                  | Nimi lähetusel        |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Indeks, linn                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 13522 Haabersti linnaosa, Tallinn, Harju maakond |               |                  | Lähetusnäav           |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Maa                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                  |               |                  | LähetusIndeks, linn   |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Maakond                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                  |               |                  | LähetusMaa            |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Asumaa                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | EE (Eesti)                                       |               |                  | Tegevusala            |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Esindaja                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                  |               |                  | Tehinguliik           |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Telefon                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                  |               |                  | Faks                  | Klassifik.          |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Skype                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                  |               |                  | Hoiatus               |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| E-mail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                  |               |                  | Url                   |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Kommenta                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                  |               |                  | Sünnipäev             | Sugu                |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Soodus %                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                  |               |                  | Keelatud artikli      |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Arve tasub                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                  |               |                  | Lubatud valem         |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Leping                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                  |               |                  | Kassa-arve kiirvaliku |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Kliendikaart                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                  |               |                  | Prioriteet            | Viitenumber 5010011 |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Maksehinnang                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Halb(69067 päeva)                                |               |                  | Haldur                |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                  |               |                  | ©-arvete vastuvõtt    |                     | Jah     |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| <table><tr><td>Pank</td><td>A/a</td><td>Tas. ting.</td><td>Läh. ting.</td><td>Läh. viis</td><td>Keel</td></tr><tr><td>Müüja</td><td>Super</td><td>Hinnavalem</td><td>Reg nr 10652749</td><td>Km reg nr EE1006153</td><td>Viivis 0</td></tr><tr><td>KM maa</td><td>Siseriiklik</td><td>KM kood</td><td>Sihtriik</td><td>Ettemaksu%</td><td>Valuuta</td></tr><tr><td>Märgukirjad</td><td>Lähetus</td><td>Lähetus</td><td>Eripakkumised</td><td>Kampaaniad</td><td></td></tr><tr><td>Hoiatab</td><td>Autom.trükk</td><td>Ei</td><td></td><td></td><td></td></tr><tr><td>Keelab</td><td>Arve väljatrükk</td><td></td><td></td><td></td><td></td></tr></table>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                  |               |                  |                       |                     |         |       |  |   |    |    |                |                |  | Pank | A/a  | Tas. ting. | Läh. ting.         | Läh. viis | Keel  | Müüja   | Super | Hinnavalem | Reg nr 10652749 | Km reg nr EE1006153 | Viivis 0 | KM maa   | Siseriiklik | KM kood | Sihtriik   | Ettemaksu% | Valuuta | Märgukirjad    | Lähetus | Lähetus | Eripakkumised | Kampaaniad                                       |  | Hoiatab | Autom.trükk | Ei |  |     |  | Keelab | Arve väljatrükk |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Pank                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | A/a                                              | Tas. ting.    | Läh. ting.       | Läh. viis             | Keel                |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Müüja                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Super                                            | Hinnavalem    | Reg nr 10652749  | Km reg nr EE1006153   | Viivis 0            |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| KM maa                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Siseriiklik                                      | KM kood       | Sihtriik         | Ettemaksu%            | Valuuta             |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Märgukirjad                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Lähetus                                          | Lähetus       | Eripakkumised    | Kampaaniad            |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Hoiatab                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Autom.trükk                                      | Ei            |                  |                       |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Keelab                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Arve väljatrükk                                  |               |                  |                       |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Viimati muutis: SUPER 18.04.2019 14:42:00 Loodud: 18.04.2019 14:42:00 (SUPER)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                  |               |                  |                       |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| <table><tr><td>Tüüp</td><td>Sisu</td><td>Parameeter</td></tr><tr><td>Võõrkeelne nimetus</td><td></td><td></td></tr></table>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                  |               |                  |                       |                     |         |       |  |   |    |    |                |                |  | Tüüp | Sisu | Parameeter | Võõrkeelne nimetus |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Tüüp                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Sisu                                             | Parameeter    |                  |                       |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |
| Võõrkeelne nimetus                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                  |               |                  |                       |                     |         |       |  |   |    |    |                |                |  |      |      |            |                    |           |       |         |       |            |                 |                     |          |          |             |         |            |            |         |                |         |         |               |                                                  |  |         |             |    |  |     |  |        |                 |                     |  |  |         |  |  |  |            |  |  |        |            |  |  |            |  |  |          |  |  |  |             |  |  |         |  |  |  |      |            |  |       |  |  |  |         |  |  |        |  |  |  |     |  |  |          |  |  |  |           |      |  |          |  |  |  |                  |  |  |            |  |  |  |               |  |  |        |  |  |  |                       |  |  |              |  |  |  |            |                     |  |              |                   |  |  |        |  |  |  |  |  |  |                    |  |     |

Kliendi kaart jaguneb omakorda sakkideks: **Üldinfo**, **Kontaktid**, **Klassid**, **Marsruudid**, **Näidud**, **Tegevused**, **Muudatused**, **Muutused**, **Transport**, **Ressurss**, **Uuringud**

|         |           |         |            |        |           |            |          |           |          |          |
|---------|-----------|---------|------------|--------|-----------|------------|----------|-----------|----------|----------|
| Üldinfo | Kontaktid | Klassid | Marsruudid | Näidud | Tegevused | Muudatused | Muutused | Transport | Ressurss | Uuringud |
|---------|-----------|---------|------------|--------|-----------|------------|----------|-----------|----------|----------|

### Üldinfo

Sakis **Üldinfo** hoitakse kliendi põhilisi andmeid ja atribuute. Väljade tähendused on järgmised:

Esmatähtsad väljad:

**Kood**- kliendi tähis Directo jaoks. Selle võib luua kasutaja sisestades sobiva tähise, mis võib sisaldada nii numbreid kui tähti. Samas, võib koodi luua ka Directo peale kliendi kaardi esmast salvestamist, andes järjekorrast järgmise tähise. **Süsteemiseadistustes** saab määrata, millist numbrivahemikku

kasutatakse kliendi koodi loomiseks või kasutatakse kliendi registrikoodi ka kliendi koodina. Kui kasutaja otsustab koodi ise sisestada, siis ei ole soovitatav kasutada selles täpitähti, kirjavahemärke ja spetsiifilisi arvuti sümboleid. Directo soovitus on, et koodi loob programm ise vastavalt administraatori poolt määratud süsteemiseadistustele, sest seda tunnust on vaja ainult seoste loomiseks ning kasutaja seda oma igapäevases töös ei vaja;

**Nimi-** Kliendi nimi.

 Kui kasutada kliendi kaardi loomisel Äriregistri abi, täitub väli Nimi automaatselt;

**Tüüp-** kliendi juriidilise keha tüüp. Valikmenüü: **Ettevõte, Eraisik, Riigiasutus**.

 Kui kasutada kliendi kaardi loomisel Äriregistri abi, siis täitub väli Tüüp automaatselt.

 Kliendi tüübi korrektne valimine on oluline käibemaksu aruande õigeks genereerimiseks;

**Reg.nr-** kliendi registrikood.

 Kui kasutada kliendi kaardi loomisel Äriregistri abi, siis täitub väli Reg nr automaatselt.

 Kliendi registrikoodi täitmine on oluline käibemaksu aruande õigeks genereerimiseks.

 Kui registrikoodi väli on täidetud ja kliendi kaart salvestatud, siis muutub välja pealkiri hüperlingiks ning selle klikkides võib avaneda mõne krediidiregistri lehekülg antud kliendi kohta. Millise teenusepakkuja ning milliste võimalustega, sõltub Süsteemiseadistusest Väliste kliendiinfo päringu URL ja teie lepingust vastava teenuse pakkujaga.

Muud väljad:

**Klass-** kliendi grupp. Klass tuleb valida klasside registrist, mis avaneb sellelt väljalt topeltklikiga või Ctrl-Entre.

**Objekt-** kliendiga seotud objekt ehk finantsdimensioon(id). Kasutatakse siis, kui soovitakse, et kliendi asetamisel dokumendile asetuks ka kindlad [objektid](#) sama dokumendi päisesse.

**Pakkumine** - kliendi sortimendi ehk pakkumise nr.

**Eripakkumised** - süsteemi seadistus (tellimusele lisatakse kliendile määratud pakkumise artiklid), kas kliendi sortiment asetub kohe või küsib tellimusel.

**Arve väljatrükk** - milline kujundus on vaikimisi kujundus. Kliendi seadistus kandub arvele ja arvelt edasi liidesed ja e-arve.

**Autom.trükk** - seadistus määrab ära, milline dokument trükitakse arve kinnitamise hetkel. Kas ka süsteemi seadistus ka seda mõjutab?

**Hoiatab** - kliendi krediidilimiidi seadistus, arve päevades

**Keelab** - kliendi krediidilimiidi seadistus, arve päevades

 Süsteemikates on nende kohta 1 seadistus, kuid kliendikaardile saab määrata erinevalt päevade arvu kaudu, millal hoiatab ja keelab.

**Lähetus** - kui kinnitada lähetus, kas tekib ka arve. Seda mõjutab süsteemi seadistus **Lähetuse kinnitamine loob ka arve, kui kliendikaardi Lähetus väärtuseks on määratud Lähetus ja Arve**

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