

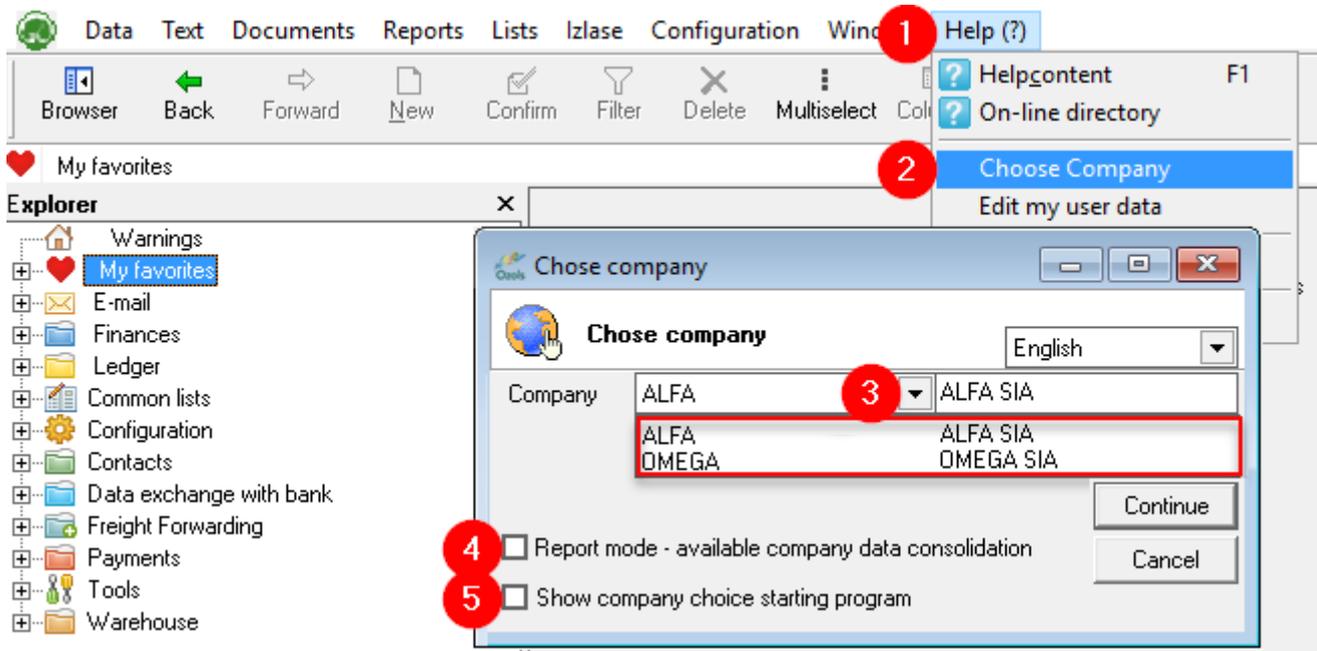
Work with several companies

How to work if you have access to several company data bases?

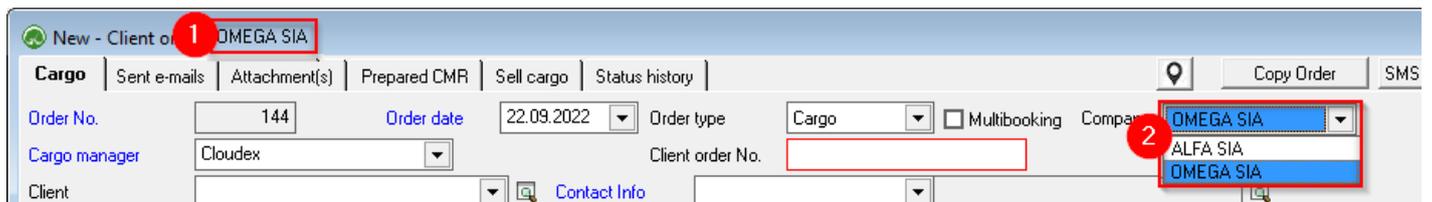
1. [Switching between companies](#)
2. [Choose the company in the New Customer's order](#)
3. [Set the default company for the cooperation Partner](#)
4. [Access shortcut to database of the other company](#)
5. [How to change the company for a created order?](#)
6. [How to change company for incoming invoice?](#)
7. Working with separate databases of several companies

1. Switching between companies

1. Help
2. Choose company
3. Select desired company
4. If you check the Consolidation, the data of all companies will be displayed together. If not, they will be separated!
5. If you check the option to choose the company will be given when opening OZOLS TMS



2. Choose the company in the New Customer's order



3. Set the default company for the cooperation Partner

It is possible for you to determine which of your companies to use by default in cooperation with the specific Partner.

1. Open **the Partner card**;
2. Open the **Other data** section;

3. Select **Default Company**.

1 New - Partner

Basic D **2** Other Data For bookkeeping Other Attachment(s) Sales

Bank	Bank Account	SWIFT	Currency

Advance pers... Circles Down trader Full loads Recipient Terminal
 Approved Client End customer Make monthly... Sender Terminal agre...
 Carrier Customs office Expeditor com... Partial loads Supplier Use myShipm...

Carrier price, 1km: [] / [] CMR insurance till: [] Insured trucks:

Send invoices to: [] Fuel surcharge: [] %

Payment currency: EUR Credit Limit: [] EUR Agreement No.: []

Prohibit orders acceptance if max payment delay is more than: [] d **3** Default company: []

Term of payment: 30 days Term of payment for incoming invoices: 40 dienās

Skonto discount: [] % Skonto discount on incoming invoices: [] %

Bank account group: [Default] CMR 16 pos.show: Our company

Order view on invoice: 1. Detailed order info Post: 7 days

Addresses view in invoice: Street, Postal code, City

Cargo descript view: Full cargo description

Hide loading/delivery date on invoice Negrupēt multibooking pakalp.rēķinā Prohibit data entry
 Hide sender and receiver on invoice In invoice order data print in supplement Print order without scanned signature
 Hide base currency sum on invoice Print invoices with signature Client himself issues invoices (self-billing)
 Show client debit/credit in invoice Calculate Penalty Interest for Contracts

Save Cancel

4. Access shortcut to database of the other company

If you have two or more companies with separate OZOLS TMS access , it is possible to create a shortcut to each of these companies. Instructions can be found [here](#) .

5. How to change the company for a created order?

If you have several companies available and you have entered the Customer's order and/or Trip/Expedition **to the wrong company**

1. Open **the Customer's order or Trip/Spedition**
2. Press **Shift +F4**
3. **Change** company
4. Click the **Edit button**
5. **!!! Close the Customer's order or Trip/Spedition by pressing the Cancel button !!!**

Klienta pasūtījums - Uzņēmums

Dok.numurs: [0]

Paskaidrojums: []

Uzņēmums: **3** OMEGA SIA

ALFA SIA

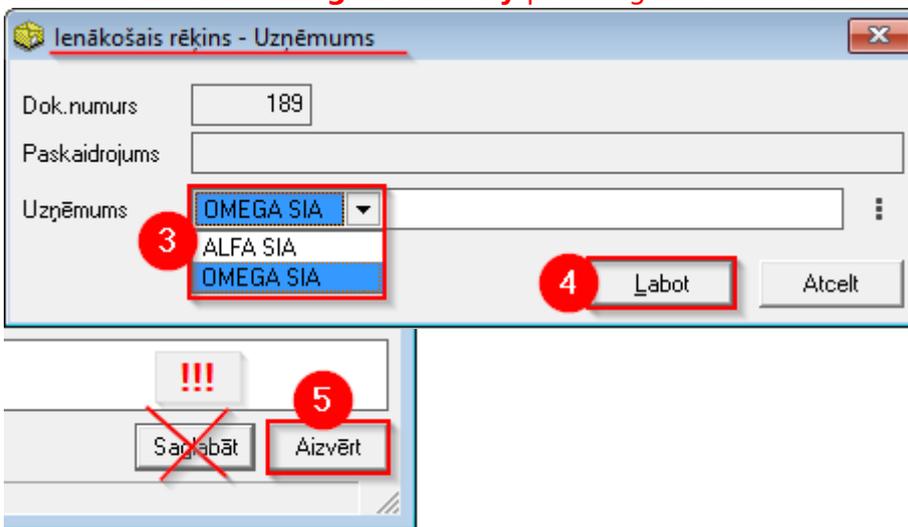
OMEGA SIA



If the Invoice is also already issued from the wrong company, it must be deleted and a new Invoice created after correcting the company (shift+F4).

6. How to change company for incoming invoice?

1. Open **the Customer's Incoming Invoice**
2. Press **Shift + F4**
3. **Change** company
4. Click the **Edit button**
5. **!!! Close the Incoming invoice by pressing the Close button!!!**



Revision #4

Created Tue, Aug 30, 2022 1:33 PM by [Janis Veldre](#)

Updated Tue, Oct 25, 2022 7:29 AM by [Janis Veldre](#)