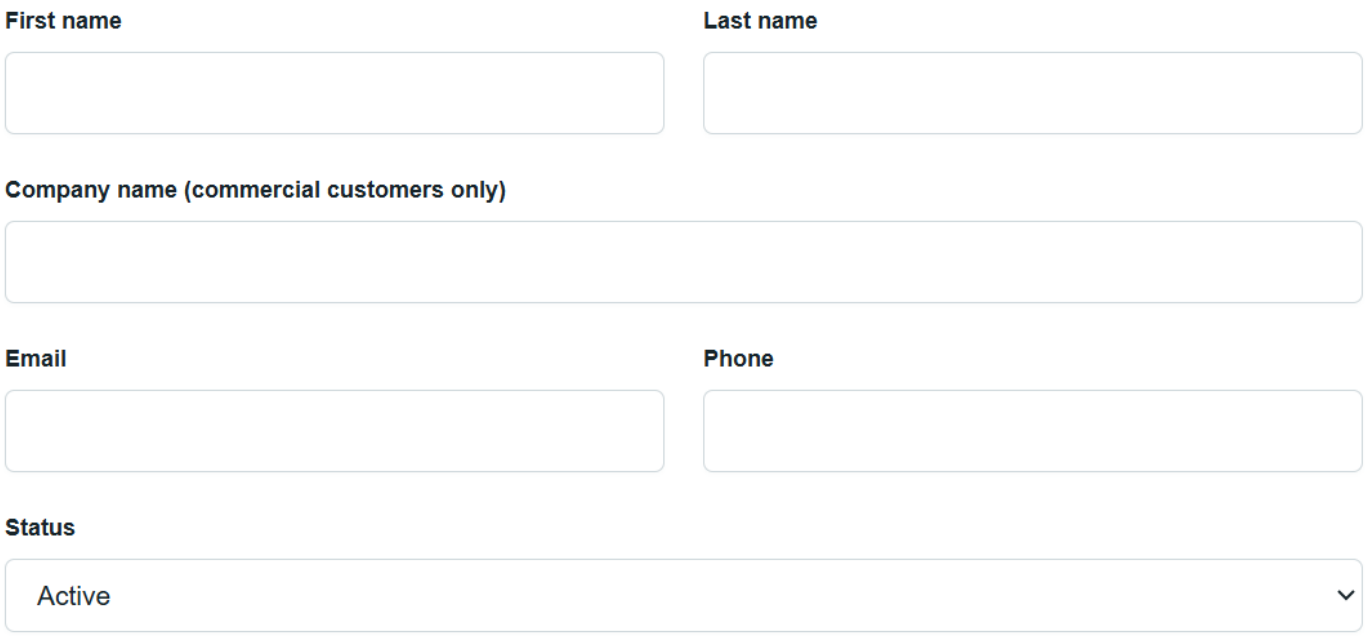
Adding Customers & Properties

Create the customer first, then add each address where your crew provides service.

Create the customer

1. Open Customers, then select New customer.
2. Enter a first or last name, or a Company name for a commercial customer. Add email and phone if available.
3. Choose the Status, add useful Notes, then select Create customer.



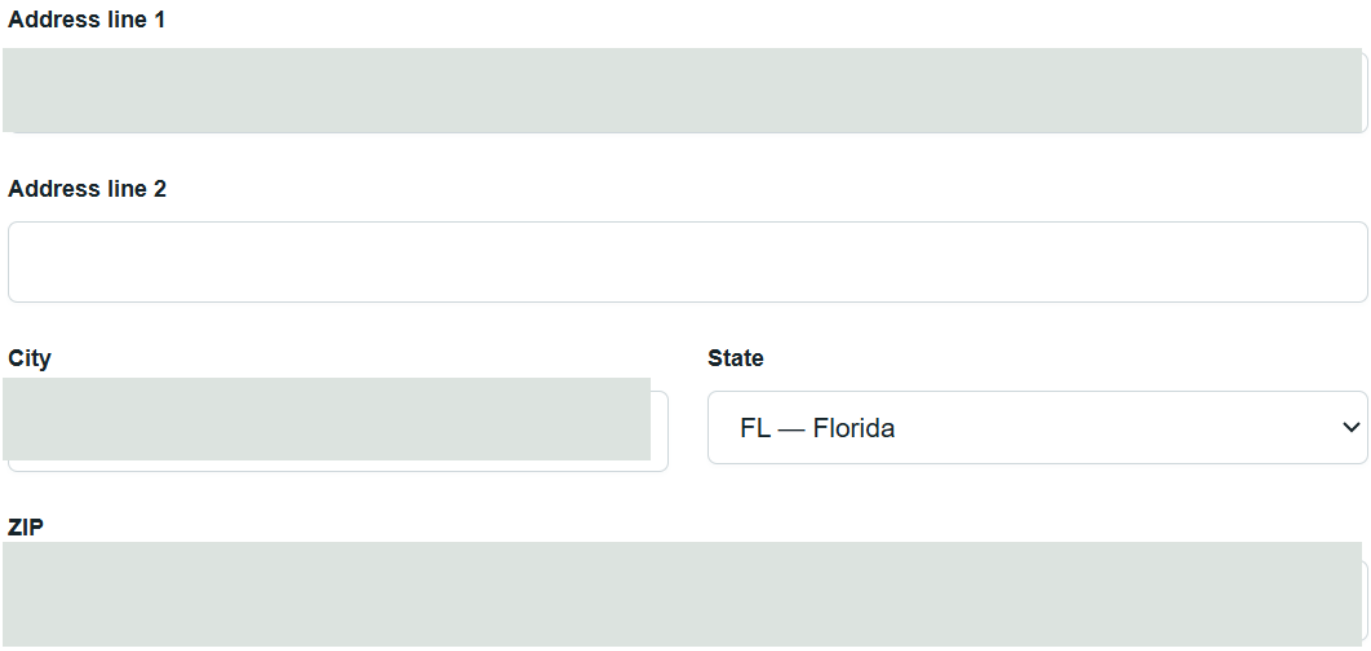
Customer contact fields. Contact details are optional.

What to expect: The customer record opens. You can now add service properties.

Adding Customers & Properties

Add a service property

4. On the customer record, find Properties and select Add property.
5. Enter Address line 1, City, State, and ZIP. Use Address line 2 if needed.
6. Add Property notes and Access instructions that help the crew on arrival, then select Add property.



Property address fields; private values have been removed.

What to expect: The property appears on the customer record. Use Add existing service at that property when you are ready to schedule work.