

### New Customer

Please note: Every job is associated with a particular customer while a customer can have multiple jobs.

#### To Add a New Customer:

- 1) From the HOME page choose 'Customers'
- 2) Click on New Customer & Job
- 3) Select New Customer
- 4) Enter, at a minimum, the following information:
  - a. Customer name—last name comma first name
  - b. On the Address Info Tab:
    - Enter First Name, Last Name & Phone
    - Enter Bill To—customer's full name and address
  - c. On the Additional Info Tab:
    - Select the appropriate Type
- 5) Click OK

#### To Add a New Job to an Existing Customer:

- 1) From the HOME page choose 'Customers'
- 2) Highlight the appropriate customer and click New Customer & Job
- 3) Select Add Job
- 4) Enter the Job Name
- 5) On the Job Info Tab: Select the Job Type and enter the Start Date and Projected End
- 6) Click OK