

## **Create Customers, Sites & Contacts**

Navigate to Job Docs/Customers, to create a new customer click +ADD NEW. Use the Filters and search field to find existing customers that need new sites or job numbers added.

Safetyminder	🚳 Dashboard 👻 Regis	ters 👻 Create Job	Docs 👻 Repor	t <del>-</del> Documentati	ion - Administration -				🛛 Help 剷 Knowl	ledge-Base  🛔 heidik 🚽
Home / Create	Job Docs / Customers									• ADD NEW
EXCEL	PDF TILTER	🕂 GROUP	o		×					
Name	Street Address	Suburb /	State	Post C	Company Pho	Company Email	Contact First	Contact Mobile	Contact Email	
Lego World	56 Brick Lane	Minyfig	SA	8523	08 3289 8956	admin@lego.com	Hamish	0404 523 874	hamish@lego.com	2 8

- 1. Type in the Name, Company Phone & Email details.
- 2. Complete the address fields.

The Create Default worksite will be ticked – which will create a Client Site with these details. Untick if not required.
 The text you type into the Name field will populate the Site Name field, change as required.

- Should you need to manually create a customer for any reason, then you can come back and fill in the simPRO client ID later. This stops duplicates from being created when you do Get Jobs.
- 5. Complete the Contact Details this will automatically generate a contact as per below.
- 6. Click 🗄 SAVE.

	Home / Job Docs / C	ustomers							
	Name				Company P	hone	Company Emai	i	
1	Lego World				08 3289 8	956	admin@lego.	com	
	Street Address				Suburb / To	wn			
2	56 Brick Lane				Minyfig		Create defa	ault worksite using these o	details
	State				Post Code		SiteName		
	SA		•	O	8523		Lego World		
Л	SimproclientiD								
-	Contact First Name			Contact Last Na	ime	Contact Mobile		Contact Email	
	Usersish			Broad		0404 523 874		hamish@lego.co	m
5	Hamish	g a client, in the edit scree	en, Sites a	and Contacts can	be added.	0404 323 014			
<b>5</b> Fron 7. 8.	Note That : After creating n the Customer Use +ADD to cre Double click or s	g a client, in the edit scree screen you can eate new sites o select 📝 to ed	now o now o or con it exis	open and e tacts.	be added. edit items - s.	- scroll down to fir	nd Client Sites & Co	ntacts.	
5 Fron 7. 8.	Note That : After creating In the Customer Use +ADD to create Double click or s	g a client, in the edit scree screen you can eate new sites o select 📝 to ed Search	now o r con it exis	open and e tacts.	be added. edit items - s.	– scroll down to fir	nd Client Sites & Co	ntacts.	ADD
5 Fron 7. 8. Clie Sit	Note That : After creating m the Customer Use +ADD to cre Double click or s	g a client, in the edit scree screen you can eate new sites o select <i>P</i> to ed Search : Zone T	now o pr con it exis	open and e tacts. ting entrie:	be added. edit items - s.	- scroll down to fir	nd Client Sites & Co	ntacts.	ADD
5 Fron 7. 8. Clie Sit	Note That : After creating m the Customer Use +ADD to creat Double click or s nt Site	g a client, in the edit scree screen you can eate new sites o select <i>P</i> to ed Search : Zone T	now o pr con it exis	and Contacts can open and e tacts. ting entries : Suburt Helens	be added. edit items - s. o/Town :	- scroll down to fir Street Address : 57 Gran St	nd Client Sites & Co	ntacts.	ADD
5 Fron 7. Clie Sit De	Note That : After creating In the Customer Use +ADD to cre Double click or s Int Site Int Site Infault	g a client, in the edit scree screen you can eate new sites o select 🕜 to ed Search : Zone T	now o pr con it exis	and Contacts can open and e tacts. ting entries : Suburt Helens	be added. edit items - s. o / Town : ville	- scroll down to fir Street Address	nd Client Sites & Co Post Code : C 3085	ntacts. 7	ADD
5 Fron 7. Clie Sit De	Note That : After creating In the Customer Use +ADD to cre Double click or s Int Site Ifault Itacts	g a client, in the edit scree screen you can eate new sites o select 📝 to ed Search E Zone T	now o pr con it exis	and Contacts can open and e tacts. ting entries : Suburt Helens	be added. edit items - s. o / Town : ville	- scroll down to fir Street Address	nd Client Sites & Co Post Code : C 3085	Intacts.	ADD
5 Fron 7. 8. Clie Sit De	Note That : After creating In the Customer Use +ADD to creat Double click or se Point Site International	g a client, in the edit screen screen you can eate new sites of select 🖉 to ed Search i Zone T Search Last Name	now o or con it exis	and Contacts can open and e tacts. ting entries : Suburt Helens	be added. edit items - s. o/Town : ville	- scroll down to fir Street Address : 57 Gran St : Street Address	nd Client Sites & Co Post Code : C 3085	ntacts. 7 Contact 8 2	ADD

Apr-22

Scroll further dow Use <mark>+ADD</mark> to creat	n to find a list of jobs for th te new entries and 📝 to e	is customer. dit existing items.	
Jobs	Search		
Work site	Job No	Job Name	:
Default	092020	HT Testing	C 💼 🔶
Default	2909HT	More Testing	6 🗇
Hope Centre	0131	HT Test Sub	
Work site Default Default Hope Centre	Job No           092020           2909HT           0131	: Job Name HT Testing More Testing HT Test Sub	

## NOTES:

- Customers and work sites can also be added directly from any of the Create Job Doc menus.
- Contacts can only be created under the customer or in the mobile app.

Safetyminder Knowledge Base - Copyright of Trans-Tasman Pty Ltd

Apr-22