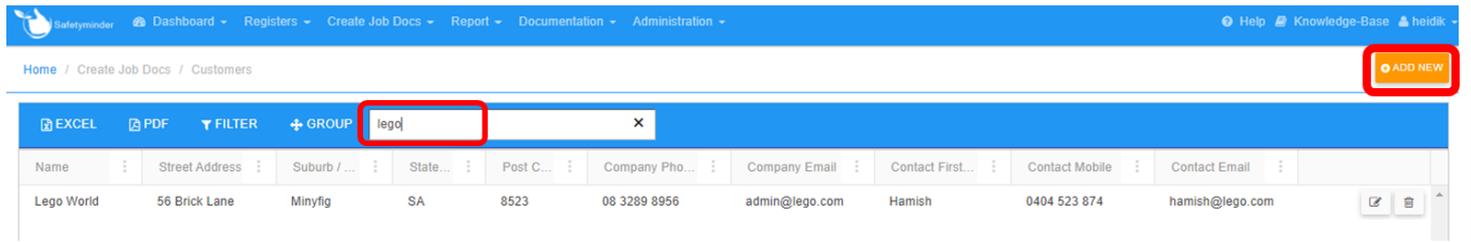
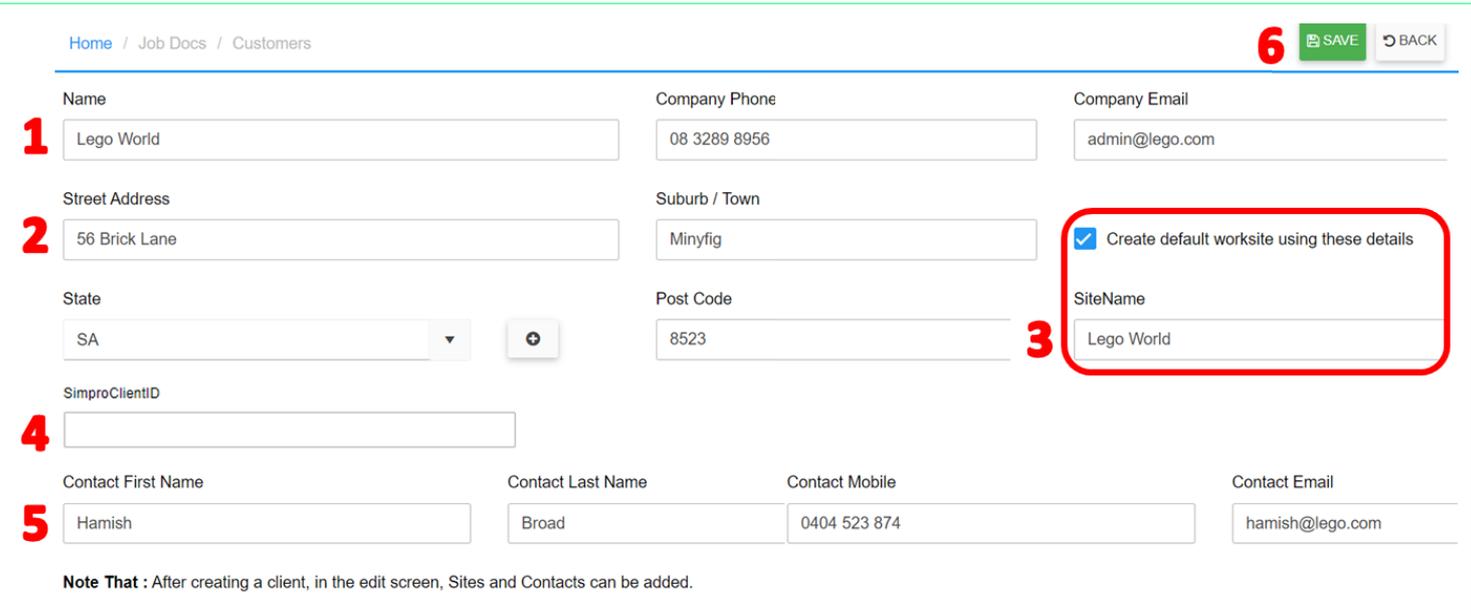




Navigate to Job Docs/Customers, to create a new customer click **+ADD NEW**.  
 Use the Filters and search field to find existing customers that need new sites or job numbers added.

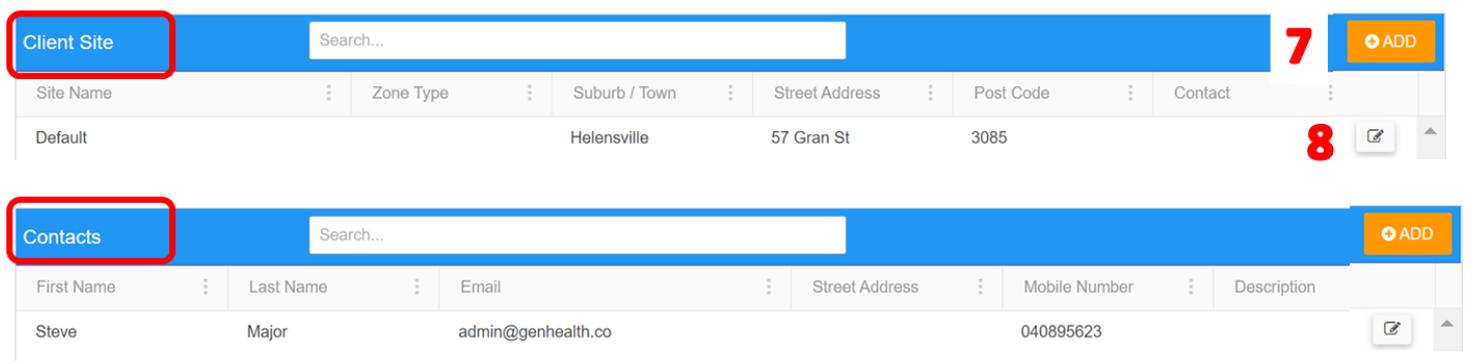


1. Type in the Name, Company Phone & Email details.
2. Complete the address fields.
3. The Create Default worksite will be ticked – which will create a Client Site with these details. Untick if not required.  
The text you type into the Name field will populate the Site Name field, change as required.
4. 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**.



From the Customer screen you can now open and edit items – scroll down to find Client Sites & Contacts.

7. Use **+ADD** to create new sites or contacts.
8. Double click or select to edit existing entries.



Scroll further down to find a list of jobs for this customer.

Use **+ADD** to create new entries and  to edit existing items.

Jobs		Search...	<b>+ADD</b>
Work site	Job No	Job Name	
Default	092020	HT Testing	 
Default	2909HT	More Testing	 
Hope Centre	0131	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.

