PeerAssist

Field Work Order

Managing Customers

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Related:

Creating a Customer CSV

Managing Customers | Part I

Import Customer Master List

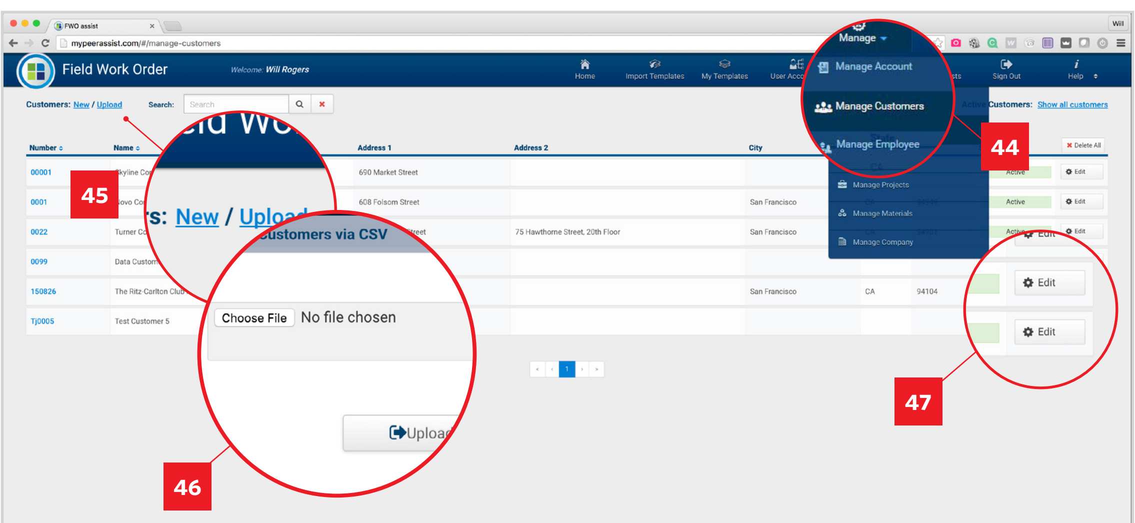
44 Hover over the "**Manage**" Tab then select "**Manage Customers**".

- Users that have permissions to Manage Projects will have access to Manage Customers and Manage Projects from the Manage Tab.

45 If this page is blank when you arrive, you have the option to click "**Upload**" to import a list of your customers from a CSV file.

46 Select "Choose File" from the popup window, **select your CSV file**, then click "Upload CSV".

47 Changes to your customer information or status may be made anytime by clicking on "**Edit**".



Managing Customers | Part II

Add New / Edit Customer

48 Hover over the "**Manage**" tab. Select "**Manage Customers**" from the dropdown menu.

49 Add new customers individually by selecting "**New**".

50 Edit customers by clicking on "**Edit**". Enter the customer's information then click "**Save**".

- ***Customer Number:** The number by which your company identifies the customer. (*Mandatory field).
- **Address:** (1) Street Name/Number, (2) Suite
- **Billing Contact**: Customer's billing contact information.
- **Billing Contact Email:** Customer's billing email.
- **Billing Contact Phone:** Customer's billing phone number.
- **Billing Structure:** Select from the additionally imported Billing templates if you will not be using your default company billing template.
- ***Customer Name:** (*Mandatory field)
- ***Contact Name**: The customer's main contact. I.e., Company Owner, Company Principal (* Mandatory field)
- ***Contact Email:** The email address belonging to the Customer's main contact. (* Mandatory field)
- ***Contact Phone:** The phone number belonging to the Customer's main contact. (* Mandatory field)
- **Status:** Select "Active"