2– Create New Customer

Make sure you do NOT highlight any rows, if you did, then just hit SEACH again

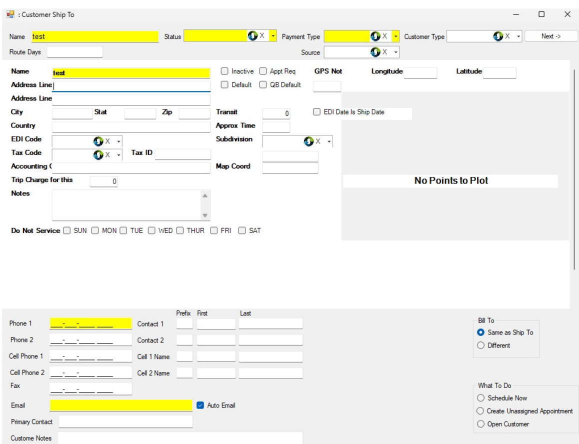
In Search set WHAT TO DO to what you want to happen AFTER the customer is created.

- Schedule Now (will create an Appointment)
- Create Task (will create an Unscheduled Appointment)

NOTE: You need to select one, but when it comes time to create it, you can hit X and cancel the Appt from being saved

Click Next->

This will open the
Customer Quick Add Wizard



For more details visit
wwwLongwellTech/tta

Longwell Technologies

PO Box 192
Trevor, WI 53179

Web: www.LongwellTrakker.com

Trakker

Quick Start

Create a New Customer

Longwell Technologies, Inc.

www.LongwellTech.com

1– Search for Customer

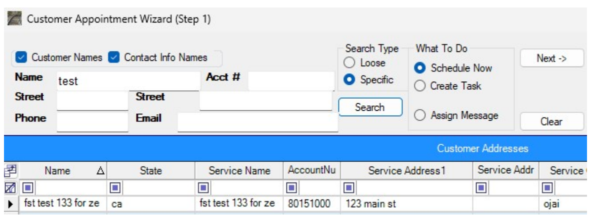
Before creating a new customer, it's a great idea to do a search for the customer to see if they already exist

Use the Customer Appt Wizard to search

This will open the Search form where you can search for Name, Acct#, Street# and Name, Phone, or email.

Set Search Type to Loose
- LOOSE will look for ANY of the data filled in
- SPECIFIC will require ALL of the data to exist

Fill in the info you know and hit Search.



Look through the list for this customer, if there, you can double click to open and edit it.

If not continue to Step 2

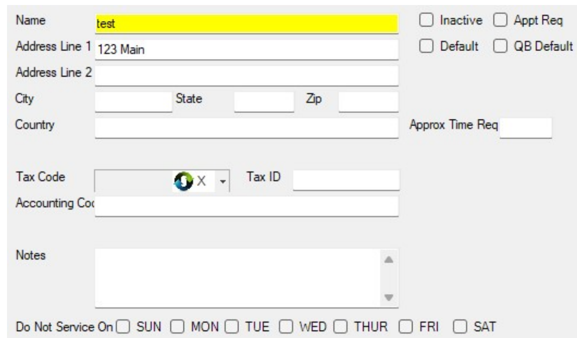
NOTE:
Yes you can go directly into the Customer Quick Add Wizard, but in general it a good idea to use the Appt Wizard to search to try an prevent accidental duplicates

3– Customer Wizard

The form will pre-fill in all of the fields that were set in the Search form

Fill in the Customer Header info
- Name (REQ)
- Status (REQ)
- Payment Type (REQ)

Fill in Address info
Long and Lat will automatically be filled in when saved

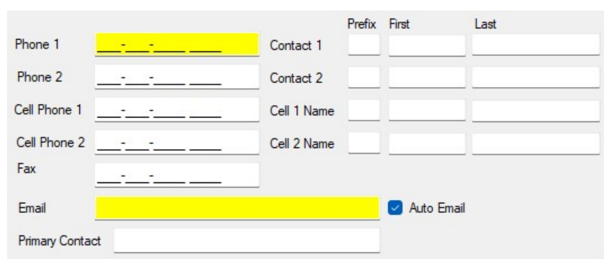


Fill in Address info
NOTE: Long and Lat will automatically be filled in when saved

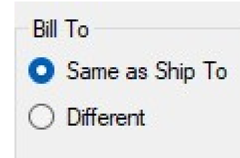
If customer Requires a scheduled appointment check App Req

(When the customer is saved, the address will be verified by a Google Maps lookup)

Fill in Contact Info

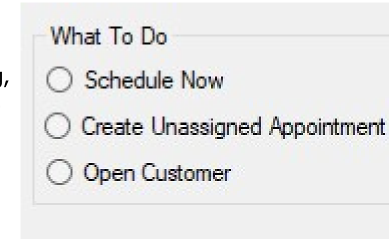


Set Bill To
Same As
Or
Different



Can Set to Open Customer if want to do more editing, otherwise will create Appointment

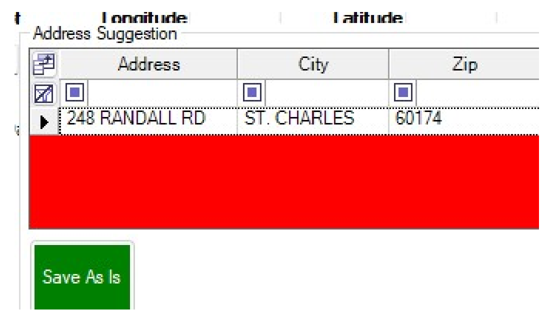
NEXT->



4– Address Verification

If Google Maps can not find the address a pop up will display that an EXACT match was not found.

If any suggestions were found they will be displayed in an Address Suggestion Box



NOTE: Difference could be using abbr (like ST. instead of Street) or S Randall Rd instead of Randall Rd ...

Double click the Suggestion and ti will fill it in
OR
Manually change the address
OR
SAVE AS IS (and it will ignore the suggestions)
NEXT ->

If set to DIFFERENT Bill To address will open a Bill To address form (with the ship to address info pre-filled in)

NEXT->

Follow steps in that process to continue, or just close it without saving