## ADDING A 3<sup>RD</sup> PARTY BILLER TO SMARTWARE

- 1. Click on New Order to get the Customer Screen where a new customer can be added.
- 2. Click on the + button to create a new customer.

	New Work Order:										
Calendar & Tasks											
	Work Order	🗎 Save and Open	H Save ØD	iscard	Custor	mer Search		Export	Q Search *	Q Search	🝠 Clear
Lud Dashboards	Job Descriptions				Dhonou		Emails		Dest		
\$ Accounting	Job Description.				Phone.		Email.		Code	ai 1:	
Administrative					Name:		Address		City:		
	Name:				10:		Territory		*		
T Customer	Address:			~							
j⊟ Dispatch	Address Note:			- 2	•	Name Phone	Email	Ť ΙĎ Τλ	vpe Address	City Zip	Active
Material											Activ 🗸
🖨 Reports					Search	×				No items	to display
Setup Franchise	Third Party Billing:										
🏦 Setup Brand	Zone:			~							
🖨 Vehicle Maintenance	Equipment:		✓	+							
🚔 Work Order	Internal Work Order	Select Equipment		+							
New Order	Comments:										
Search											
Send Confirmation	Dispatch Code:			~							
WO Search:	Skill Level:										
>	Scheduler:	<b>₩</b> +1 <b>₩</b> □									

3. Select Commercial to add a Company name.

Customer		H Save and Open	H Save	Ø Discard
Туре: 3	Commercial			~
Company:				
Address 1:				
Address 2:				
Postal				
Code: City:				
Sil).				

- 4. Enter Company Name, Address and phone number.
  - a. If using a zip code that is outside of your territory, you will get a message to let you know. You can still use the address without adding the postal code.



5. Validate Address. If using a P.O. Box, it will validate to just a city, state and zip code.

Google Mappin	g Address:		
Grandville, MI 4	19418		
Postal code is I	not in any of your Territories.		
Mapping Accuracy:	APPROXIMATE V	🖌 Validate Ad	dress
Lat:	42.88662	Long:	-85.7657

6. Click on Save. If using a P. O. Box, you will get a red error message saying that the address can't be found on Google. Move the location point on the validation map, then click on Save again. The system will allow the second save.

ustomer			H Save and Open	H Save	Ø Discard
Туре:	Commercial				~
Company:	Third Party Biller				
Address 1:	P.O. Box 133				
Address 2:					
Postal Code:	49418				
City:	Grandville				
State/Prov.:	Michigan	~			
Phone Number:	(254) 555-5555	Туре:	Cell Phone 🗸	Desc:	
Alt Phone:	(###) ###-####	Type:	Cell Phone 🗸	Desc:	
Email Address:				Desc:	
Google Mappin Grandville, MI	<b>g Address:</b> 19418				
Postal code is	not in any of your Terri	tories.	Error		
Mapping Accuracy:	APPROXIMATE	*	dataFactory.p Detail::400::C Google - plea: Customer scr	ostTableItems: ould not locate se retry or put een if it cannot	CustomerWi address on in on the be found on
Lat:	42.88662		Google	J	
Google Mappir	a Address:				
Grandville ML	-				

Grandville, N	AI 49418			
Postal code	is not in any of you	ur Territories.		
Mapping Accuracy:	APPROXIM	ATE 🗸	✓ Validate	Address
Lat:	42.88662		Long:	-85.76575
Мар	Satellite			
		JENISON	Grandville	CLYDE PARK
	Georgetown Twp	W		
			913	
			GRANDVILLE BUSINESS DISTRICT	CHATEAU HILLS
idsonville			SOUTH	

- 7. Select 3<sup>rd</sup> Party as Billing Type.
- 8. Click on Save.
- 9. Discard work order.

Work Order		a Save and Open	9	⊘ Discard
Job Description:				
Name:	Third Derty Dillor			0
Address:	49418 - Home Address - P.O. Br	ox 133 Grandville M	lichigan 4941	8
Address Note:		on roo oranormo, m	in inguit to the	

Customer			8 H Save	Ø Discard
Company:	Third Party Biller	7 Billing Type:	3rd Party	~
Tax Exempt:		Type:	Commercial	~
Do Not Mail: Special Info:		Credit Term:	Due On Receipt	~
		Lead Source:		~
		Secondary Lead Source:		~
D:3796713 Created:2021	-05-27 Updated:2021-05-27			