

ADDING A 3RD 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:

Work Order Save and Open Save Discard

Job Description:

Name:

Address:

Address Note:

Third Party Billing:

Zone:

Default Phone:

Equipment:

Internal Work Order Comments:

Dispatch Code:

Skill Level:

Scheduler:

Customer Search Export Search+ Search Clear

Phone: Email: Postal Code:

Name: Address: City:

ID: Territory:

	Name	Phone	Email	ID	Type	Address	City	Zip	Active
									Acti

Search No items to display

3. Select Commercial to add a Company name.

Customer Save and Open Save Discard

Type:

Company:

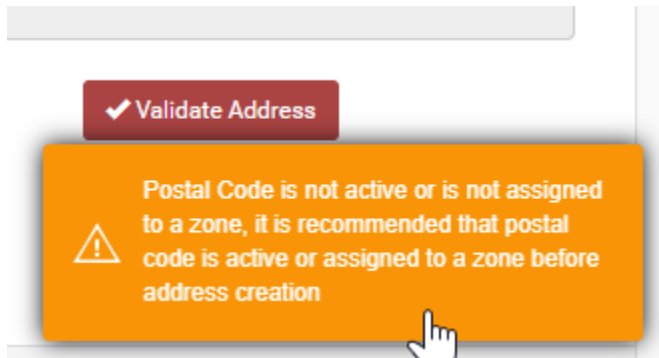
Address 1:

Address 2:

Postal Code:

City:

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 Mapping Address:

Grandville, MI 49418

Postal code is not in any of your Territories.

Mapping Accuracy:

APPROXIMATE

Validate Address

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.

Customer

Save and Open

Save

Discard

Type: 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 Type: Cell Phone Desc:

Alt Phone: (###) ###-#### Type: Cell Phone Desc:

Email Address:

Google Mapping Address:

Grandville, MI 49418

Postal code is not in any of your Territories.

Mapping Accuracy: APPROXIMATE

Lat: 42.88662

Error
dataFactory.postTableItems::CustomerWith
Detail:400::Could not locate address on
Google - please retry or put in on the
Customer screen if it cannot be found on
Google

Google Mapping Address:

Grandville, MI 49418

Postal code is not in any of your Territories.

Mapping Accuracy: APPROXIMATE

Validate Address

Lat: 42.88662

Long: -85.76575



7. Select 3rd Party as Billing Type.
8. Click on Save.
9. Discard work order.

Work Order Save and Open **9** Discard

Job Description:

Name:

Address:

Address Note:

Customer **8** Save Discard

Company: **7**

Tax Exempt:

Do Not Mail:

Special Info:

Billing Type:

Type:

Credit Term:

Lead Source:

Secondary Lead Source:

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