

# New Customer Overview and Topics

Last Modified on 01/09/2023 2:11 pm EST

The creation of the two customer types; Customer/Site and Master Account/Subaccounts differs in the data entry process. The creation of the Customer/Site customer type will be detailed in this section. The [creation of Master Accounts/Subaccounts](#) is detailed under Master Account Management.

Note: For SedonaOffice customers that are using QuoteWerks, the creation of a new customer is accomplished through the Job Management module. Follow this link for the QuoteWerks Customer/Site creation method.

When creating a new Customer, the User has the option of creating a System record and Recurring Lines at this time. If an Installation Job is going to be created after the Customer record is saved, the User should create the System record when creating the new Customer. If a System record is not created before an Installation Job is created, other Users will not be able to create a Service Ticket if it is necessary to send out a Service Technician to work on the Job while it is in progress. If Recurring Lines are going to be activated and invoiced on an Installation Job, the User will not create Recurring Lines during the creation of a new Customer. The Recurring Lines will be set up and activated through the Installation Job.

Note: When creating Customer and Site records, the format in which the name is entered is of great importance. Names appear printed on various documents and proper formatting will insure a well presented document to your customer. Please read the [Formatting Names](#) page prior to setting up residential type customers and/or sites. For step by step instructions on creating a new customer, follow the [How To Create a New Customer](#) link.

Refer to the links below for a list of topics included in the New Customer section.

- [Creating a New Customer](#)
- [Creating a New Customer from a QuoteWerks Quote](#)
- [Formatting Customer Names](#)
- [Customer Items](#)
- [Site Items](#)
- [Billing Contacts](#)
- [Site Contacts](#)
- [Add Customer Recurring](#)
- [Credit Card Setup](#)
- [Customer Bank Setup](#)
- [Add Additional Bill To's](#)
- [Add Additional Sites](#)
- [Add Additional Systems](#)