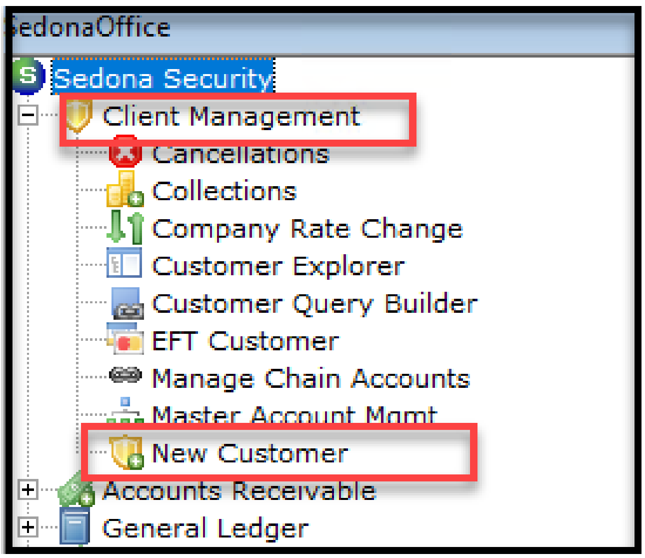
How To Create a Company House Account

Last Modified on 07/05/2024 11:59 am EDT

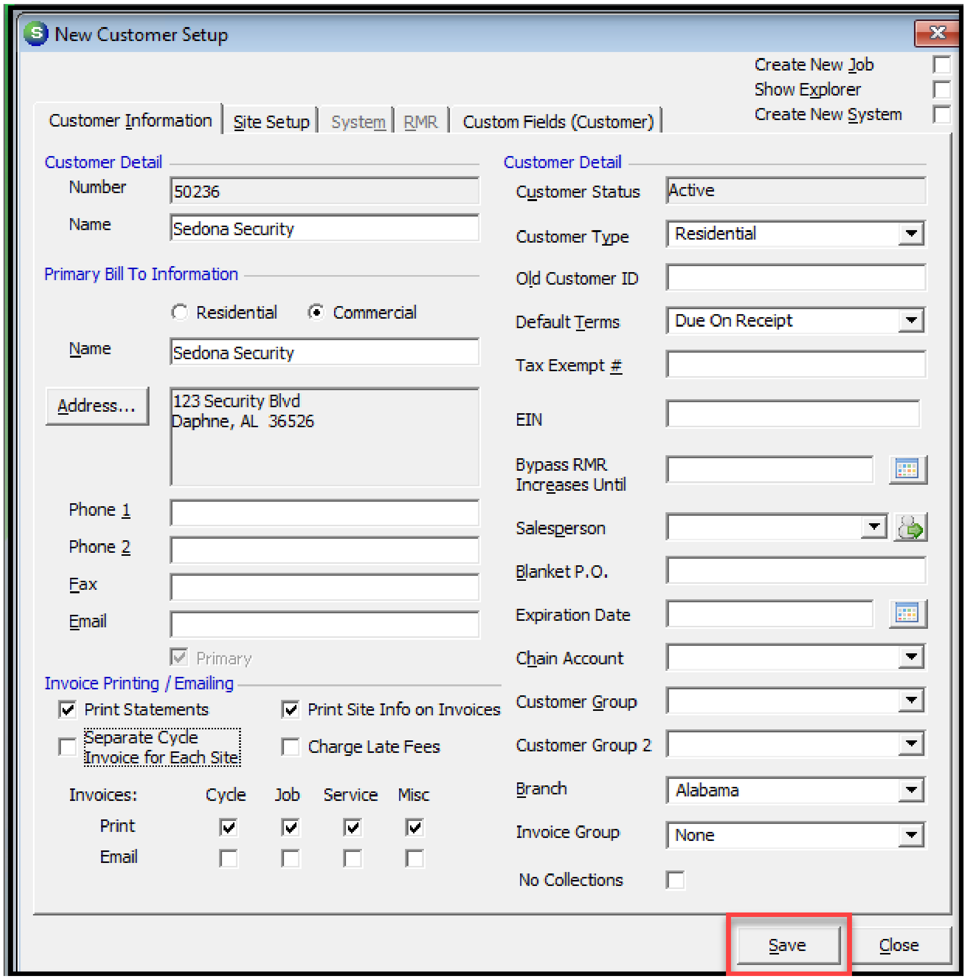
A Company House Account can be used for testing purposes or if you receive a payment from a Non-Customer or a Vendor.

Client Management

1. Go to Client Management and select "New Customer."



2. Enter your Company Name.
3. Enter the address and any additional information if needed.
4. Save.


New Customer Setup
Create New Job
Show Explorer
Create New System
Customer Information
Site Setup
System
RMR
Custom Fields (Customer)
Customer Detail
Number
50236
Name
Sedona Security
Primary Bill To Information
Residential
Commercial
Name
Sedona Security
Address...
123 Security Blvd
Daphne, AL 36526
Phone 1
Phone 2
Fax
Email
Primary
Invoice Printing / Emailing
Print Statements
Print Site Info on Invoices
Separate Cycle Invoice for Each Site
Charge Late Fees
Invoices:
Cycle
Job
Service
Misc
Print
Email
Customer Detail
Customer Status
Active
Customer Type
Residential
Old Customer ID
Default Terms
Due On Receipt
Tax Exempt #
EIN
Bypass RMR Increases Until
Salesperson
Blanket P.O.
Expiration Date
Chain Account
Customer Group
Customer Group 2
Branch
Alabama
Invoice Group
None
No Collections
Save
Close