

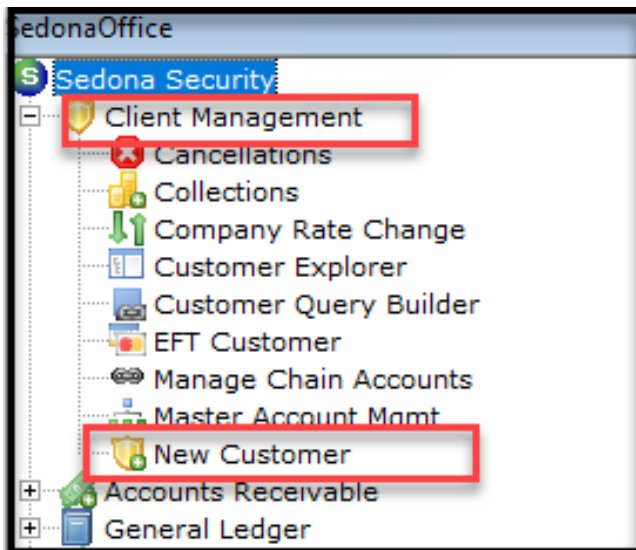
How To Create a Company House Account

09/13/2024 3:37 pm 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

Customer Information | Site Setup | System | RMR | Custom Fields (Customer)

Create New Job
 Show Explorer
 Create New System

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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**