

New Client



Client details

No title	First name	Last name
Company name		
<input type="checkbox"/> Use company name as the primary name		
Contact Details		
Main	Phone number	
<input checked="" type="checkbox"/> Receives text messages		
Add Phone Number		
Main	Email address	
Add Email Address		



Property details

Street 1	
Street 2	
City	State
Zip code	United States

Taxes [Select Tax](#)

Billing address is the same as property address

Additional property details

 **LIVEWORKSHEETS**

Request for Client Name +

Request title

Request title

Request details

Requested on

Nov 04, 2024

Service Details

SCOPE OF ESTIMATE: Type of job: Areas of installation (full, front, back, sides), Repair, new, replace, new roof

CUSTOMER PRESENT:

- Yes, please talk to them
- No, the client will not be present

 **LIVEWORKSHEETS**

DISCLOSURE: Our minimum fee is \$320, the technician will text them 15 minutes before

- Perfect, i would like to proceed
- I'd prefer not to proceed at this time. Thank you.

Your Availability

Which day would be best for an assessment of the work?

What is another day that works for you?

What are your preferred arrival times?

- Any time
- Morning
- Afternoon
- Evening



On-site assessment required

Schedule an assessment to collect more information before the job

Assessment

Instructions

Start date

End date

Times

Team

+ Assign

Start time

End time

No users are currently assigned

Schedule later

Any time

 **LIVEWORKSHEETS**

Internal notes

Internal notes will only be seen by your team

Note details

Drag your files here or [Select a File](#)

Link note to related

Quotes Jobs Invoices

[Cancel](#)

[Select Client](#)

LIVEWORKSHEETS