


New Client



Client details

No title ▾

First name

Last name

Company name

☐ Use company name as the primary name

Contact Details

Main ▾

Phone number

☒ 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 ▾



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



GATE CODE & SERVICE ENTRY:

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

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