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

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

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

LIVEWORKSHEETS

On-site assessment required
Schedule an assessment to collect more information before the job

Assessment

Instructions

Start date **End date**

Times

Start time End time

Schedule later

Any time

Team

+ Assign

No users are currently assigned

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

- [x] Quotes
- [x] Jobs
- [x] Invoices

Cancel

Select Client

LIVEWORKSHEETS