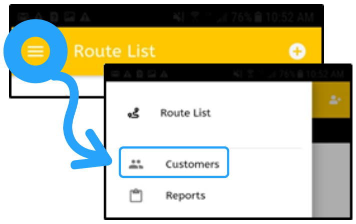
HOW TO ADD A CUSTOMER

ADMIN ONLY FEATURE

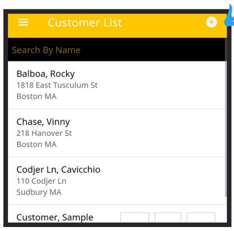
Option 1 - Add Contacts From Your Phone

This option is only available on the mobile app

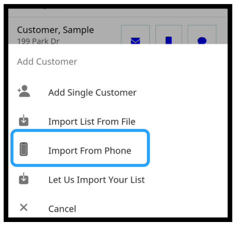
Go to the main menu in the top left corner. Then, select "Customers".



Tap the ⊕ icon in the top right corner

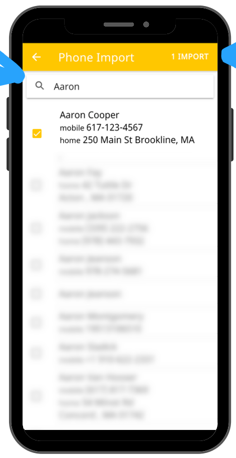


Select "Import From Phone"



THE APP NEEDS ACCESS TO YOUR CONTACTS TO IMPORT.
IF YOU SAY NO TO THE INITIAL PROMPT, GO TO YOUR PHONE'S PERMISSION SETTINGS AND ALLOW ACCESS.

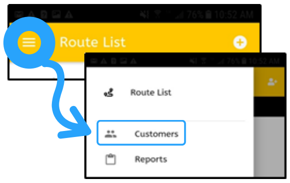
Search for the customer(s)
You can search for and select multiple contacts in one import.



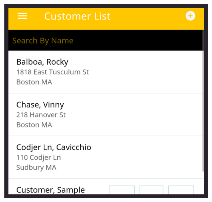
Tap "IMPORT" in the top right corner when you have selected the contacts.

Option 2 - Add Single Customer From the Customers Menu

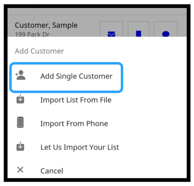
Go to the main menu in the top left corner. Then, select "Customers".



Tap the ⊕ icon in the top right corner



Select "Add Single Customer"



Display name is the only Customer name that the crew will see.

Enter the customer details and tap "SAVE".

ADMIN ONLY FEATURE

Option 3 - Add Multiple Customers At Once

GOLD PLAN ONLY

Technically, you can do this from your phone. However, we recommend using a computer. You can access your account here: m.ezbz.app

First, you will need to gather your customers' info on a spreadsheet.
You can download existing customer data from many commonly used services such as:

- *QuickBooks*
- *Google/Gmail Contacts*
- *Apple/iPhone Contacts*
- *Microsoft Outlook*

IMPORTANT!
There are a few things you must do before you upload your customer list:

- The top row must contain the header titles in the IMPORT CUSTOMER CSV SPREADSHEET, or the import will not work.
- The spreadsheet must be in .CSV format, or the import will not work.
- Garbage in, garbage out. The data you upload is what the app will use. We recommend reviewing your list carefully prior to upload to ensure that the data is accurate and correct.

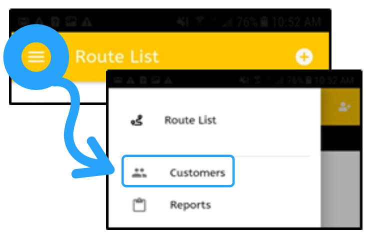
There's no "bulk delete" option. It's better to double check the list than to delete individual customers.

Seriously, they have to match exactly.

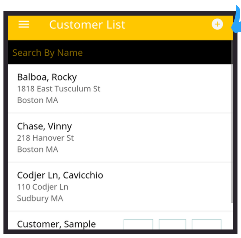
After you have:
- ✓ Used the header rows from the IMPORT CUSTOMER CSV SPREADSHEET
- ✓ Double checked all of your data
- ✓ Saved the spreadsheet in .CSV format

You are ready to upload!

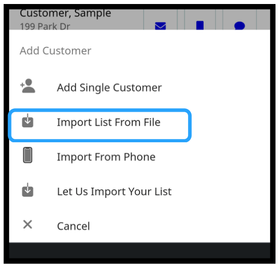
Go to the main menu in the top left corner. Then, select "Customers".



Tap the ⊕ icon in the top right corner



Select "Import From File"



Click the "Upload" button, select the .CSV file on your computer, and click "Open".

You can check the upload status in the "Import History" menu.
If the status is "complete", you're good to go!

If your import fails:
First, refresh your browser, then check the Customers menu. Some of the customers may have imported even if you get a failure status.

Next, double check your spread sheet:
- Is it saved in .CSV format?
- Does every column with data have a header title row?
- Do the titles in the header column exactly match those in the IMPORT CUSTOMER CSV SPREADSHEET?
- Are the column header titles in the exact same order as those in the IMPORT CUSTOMER CSV SPREADSHEET?

If the answer to any of these questions is "no", you must edit your spreadsheet so that the column header titles exactly match those on the IMPORT CUSTOMER CSV SPREADSHEET and save the file in .CSV format.

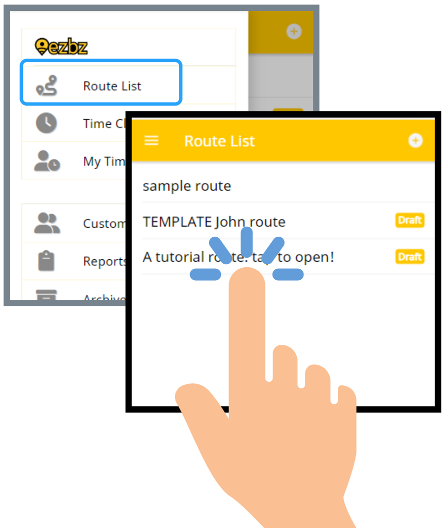
If the Import History shows a failure status with more lines than what your sheet has, refresh the browser and check the Customer menu to see if any customer files successfully uploaded. You should copy and paste only the failed data and headers onto a new spreadsheet.

HOW TO ADD A CUSTOMER (CONT.)

ADMIN ONLY FEATURE

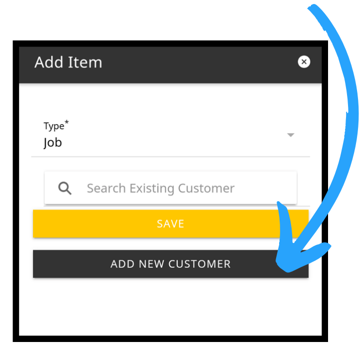
Option 4 - Add Customer Directly Onto a Route

Navigate to the main Route List.
Tap on the Route to which you want to add the new customer.

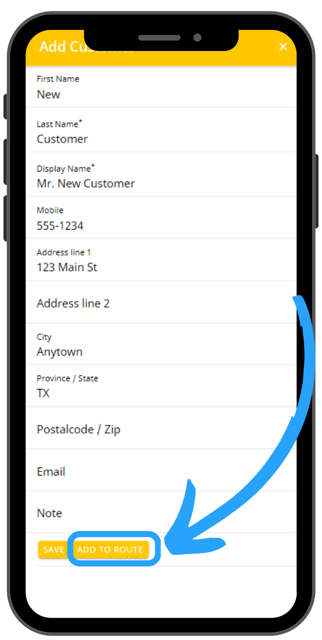


Tap the ⊕ in the top right corner of the route name title bar.

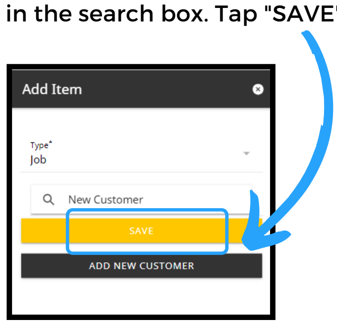
Select Job from the Type menu.
Tap "ADD NEW CUSTOMER"



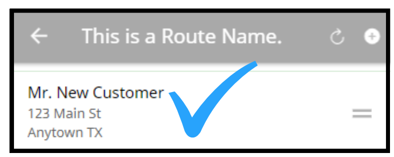
Fill in the customer information and click "Add to Route".



You will now see the customer's name in the search box. Tap "SAVE"



The customer is now on your route list!



Option 5 - Have Us Do It For You

We can help get your customer list complied, organized, cleaned up and uploaded so that you can get back to work!

Go to:
https://ezbz.app/customer-list-help/

Or, email us:
support@ezbz.app