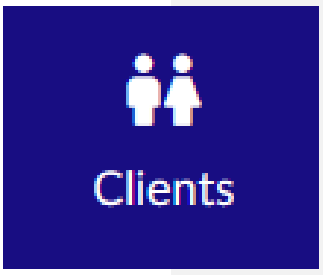
Quick Start Guide

ADDING A CLIENT

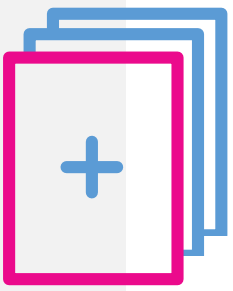


Clients Tab

You can use this tab to edit or add a client to your database.

Add a Client

Click the pink + sign in the upper right corner to create a new client.





Client Identification

After entering the client's basic information, click "Add" to reveal more fields for additional contact information.

Reminder #1

After adding or changing information, always select "Update".





Reminder #2

It's important to regularly update and review your client list for accuracy.