How to add a customer

For shops and other partners. Type a customer's details once, and the documents you make for them start from those details: the recovery report, their playbook, and a Small Office playbook for a business customer. Each fills only what's still blank and says what it filled.

Open it

1. Sign in to your organization page. On the home screen, under **Build one with a client now**, press **Customer page**. It's also in the **Recovery reports** tile: **Open the Customer page**.
2. Press **New customer** (twice, to confirm) before each new customer, so the last one's details don't carry over.

Fill in what you know

1. **The customer.** Their full name and ZIP code. The ZIP code fills in the state and suggests the sheriff's office. If the ZIP code crosses a county line, press the right county. Inside city limits, type the city police non-emergency number instead.
2. **Their family helper.** The first person they'd call when something seems wrong: a name, the relationship and a phone number.
3. **Banks, phone and email.** Bank and credit union **names only**, one per line, plus the cell phone company and the email provider. Phone numbers for the banks are copied from the customer's own cards later, in the playbook.
4. **Devices.** The phones, tablets and computers, one per line.
5. **A business customer?** For a church, nonprofit or small office, its name and city start the Small Office playbook.

6. Leave anything you don't know blank. **Never type passwords, PINs or full card or account numbers.** The page refuses to save anything that looks like one.

Start their documents

1. **Recovery report** (full edition): press **Open the recovery report**. A new job starts with their name, state, police number and devices.
2. **Their playbook:** go back to your organization page and press **Start a personal playbook** (or **Start a Small Office playbook**), then **Open the playbook**. It opens with their details filled in. The details travel inside the link and are removed from the address as soon as the playbook reads them; they're never sent to us.
3. Each document fills **only blank parts** and says which. Check each one with the customer.

Keep them for later

1. The details stay in this browser tab until you close it.
2. Press **Save customer file** to keep them with your customer records. Open it again with **Open customer file**, or use **Fill from customer file** in a recovery report or a playbook, on any computer.
3. Using the case workspace (beta)? Press **Open case**, choose the customer's case and press **Save to case**. The details are encrypted in your browser first, and the recovery report fills from them whenever you open that case. See How to use the case workspace.

Stuck?

Email jeff@jcady.org or call (520) 223-9878 ext. 800, and say which page you're on. We'll never ask for a password, a code from your phone, or a card number.