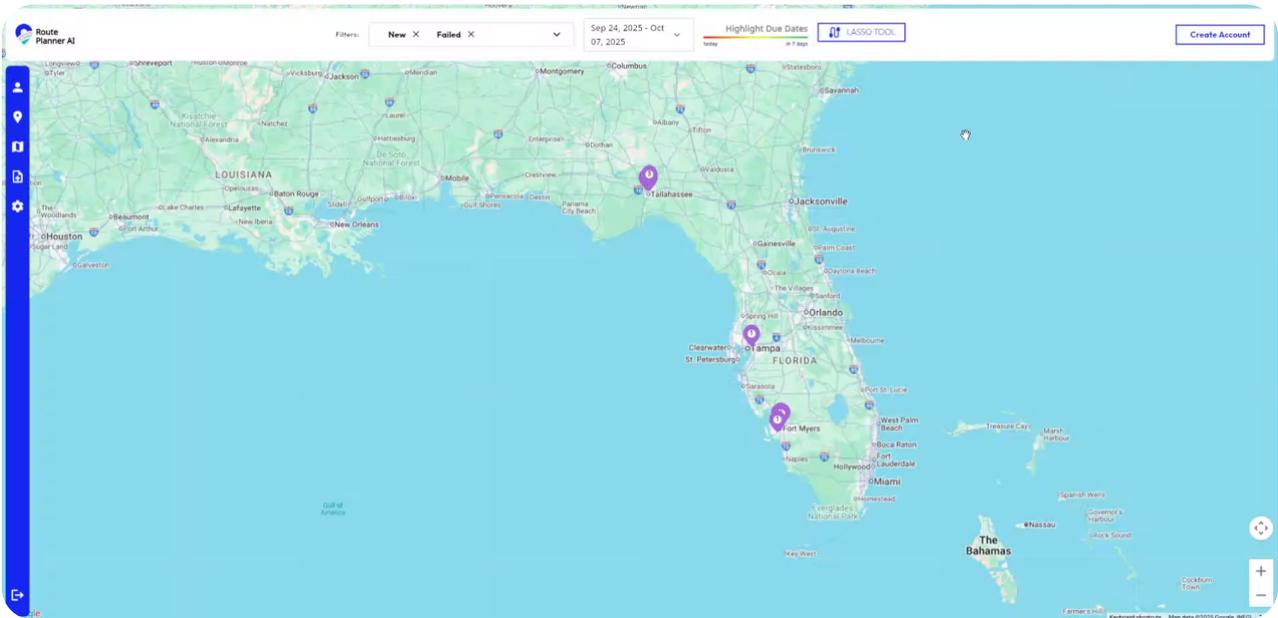


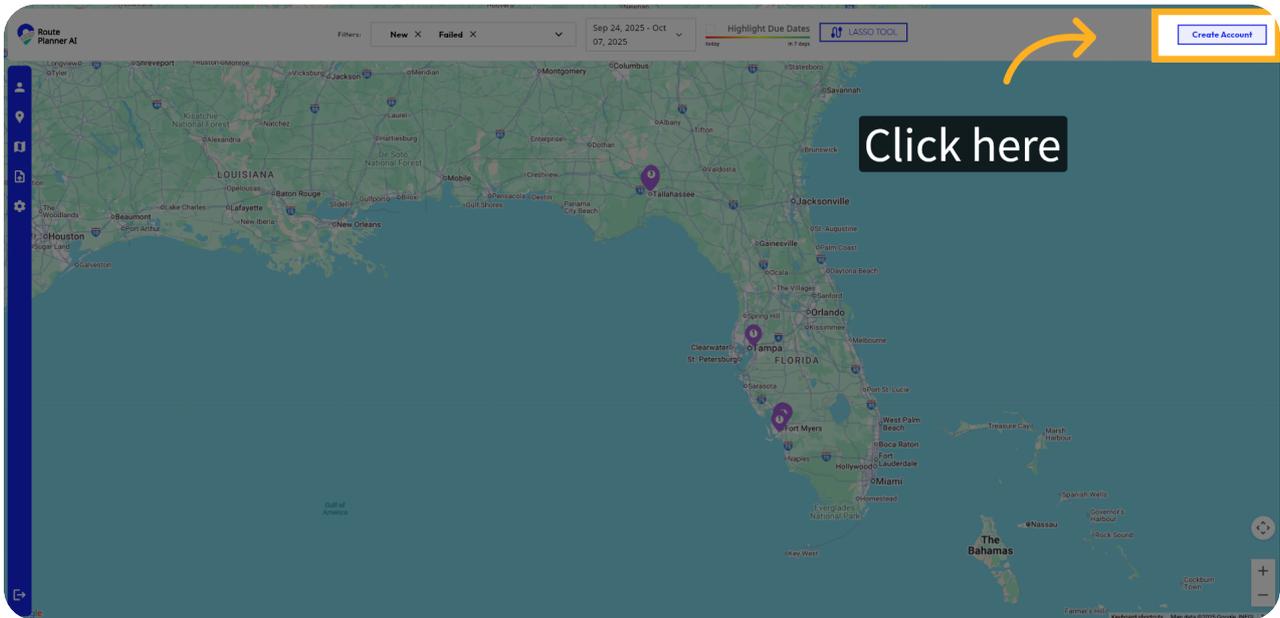
## 01 Introduction

An Account represents one of your customers — which can either be a business or an individual person.



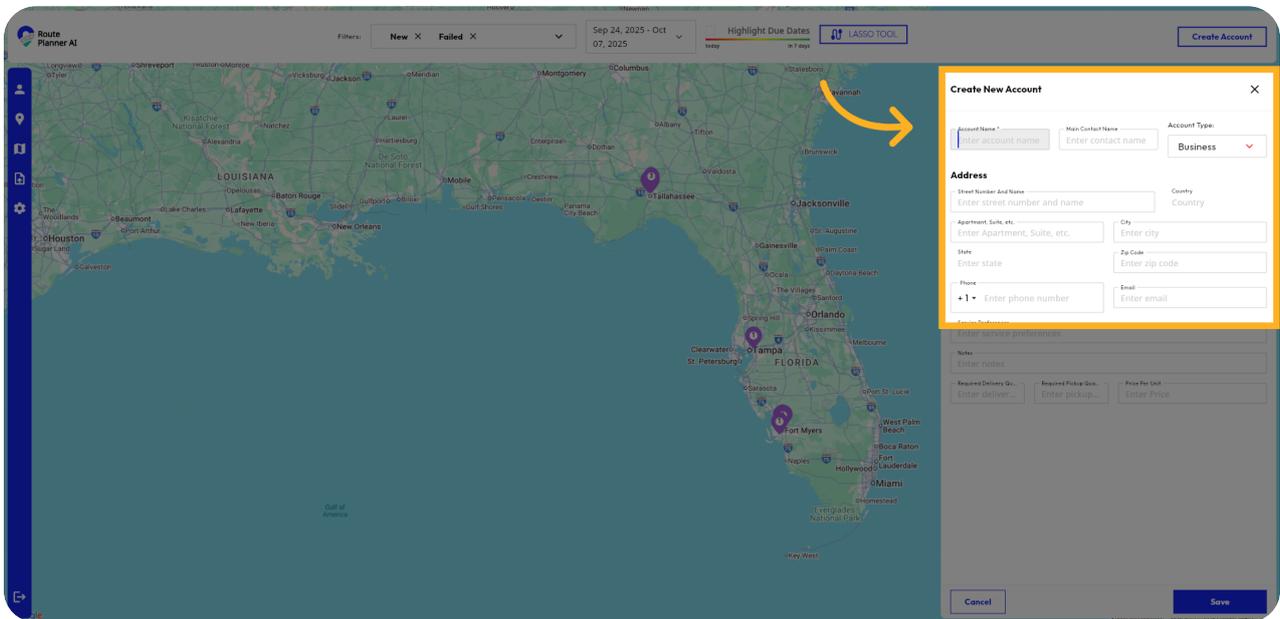
## 02 Click Create Account

The quickest way to create an Account is to click the Create Account button in the top right of the page.



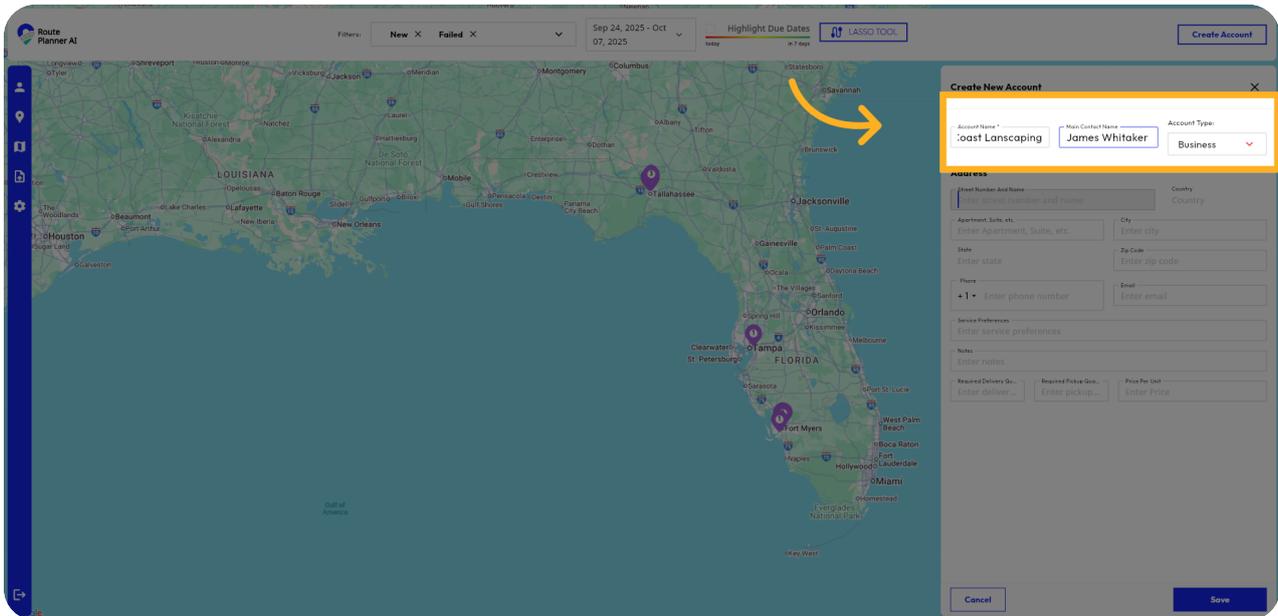
### 03 Create New Account panel opens

This will open the Create New Account panel on the right hand side



## 04 Input Account Name

On the Create New Account screen, you can enter the Account Name, and optionally the name of the main contact person. The Account Type will default to whatever you selected in your Personalization settings.



## 05 Input Customer Contact Details

You can look up the customer's address in the address field.

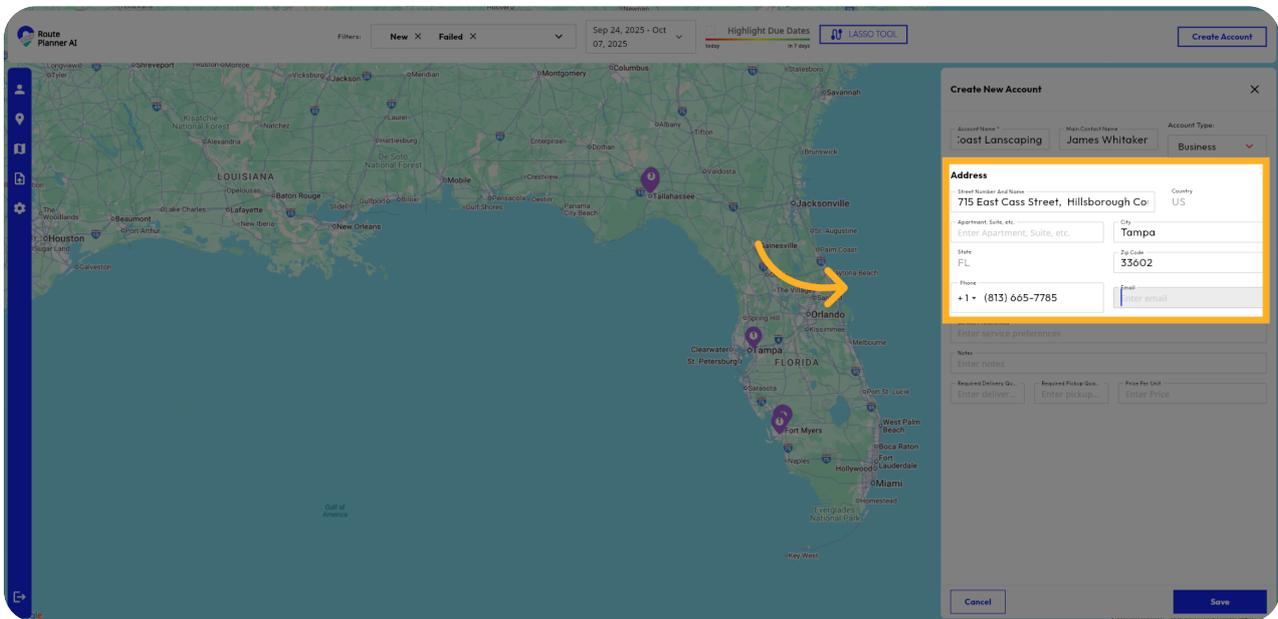
The screenshot displays the 'Route Planner AI' interface. On the left, a map of Florida is shown with several purple location markers. The top navigation bar includes filters for 'New' and 'Failed', a date range of 'Sep 24, 2025 - Oct 07, 2025', a 'Highlight Due Dates' button, and a 'LASSO TOOL' button. A 'Create Account' button is located in the top right corner. On the right side, a 'Create New Account' form is open, containing the following fields:

- Account Name:** 'Landscape Lanscaping'
- Real Contact Name:** 'James Whitaker'
- Account Type:** 'Business' (dropdown menu)
- Address:** '159 Cypress' (with a dropdown arrow), 'W Cypress St, Tampa, FL' (with a dropdown arrow), and 'Powered by Google' (with a dropdown arrow)
- Phone:** '+1' (with a dropdown arrow), 'Enter phone number' (input field), and 'Enter email' (input field)
- Service Preferences:** 'Enter service preferences' (input field)
- Notes:** 'Enter notes' (input field)
- Required Delivery Fee:** 'Enter delivery' (input field)
- Required Price Box:** 'Enter pickup' (input field)
- Price Per Unit:** 'Enter Price' (input field)

At the bottom of the form, there are 'Cancel' and 'Save' buttons.

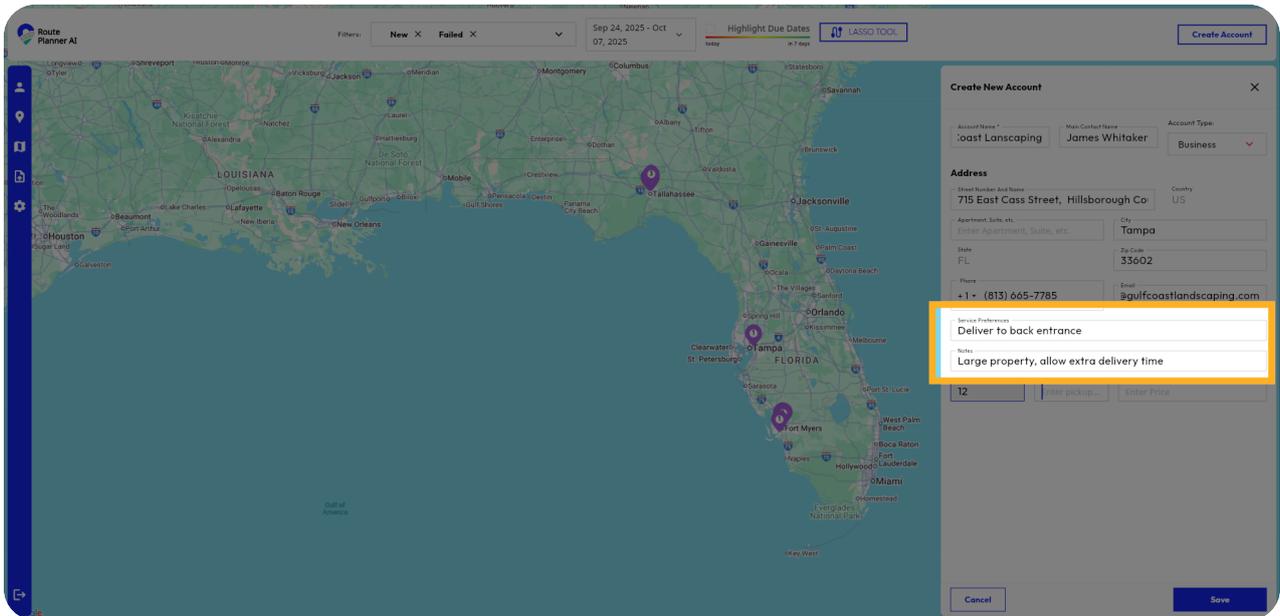
## 06 Input Phone and Email

In addition you can input their contact phone and email



## 07 Input Service Preferences & Notes

The Service Preferences section lets you capture any customer-specific requests. These preferences will automatically copy onto any Orders you create for them and will also be visible to drivers during their routes.



## 08 Input Order Quantities & Price

At the bottom, you'll see quantity and price fields. These are useful if a customer typically has the same delivery or pickup amounts each time. Any values you set here will default onto every Order you create, but you can override them when needed: Required Delivery Quantity – the typical number of units you deliver. Required Pickup Quantity – the typical number of units you collect. Price per Unit – the amount charged per order unit.

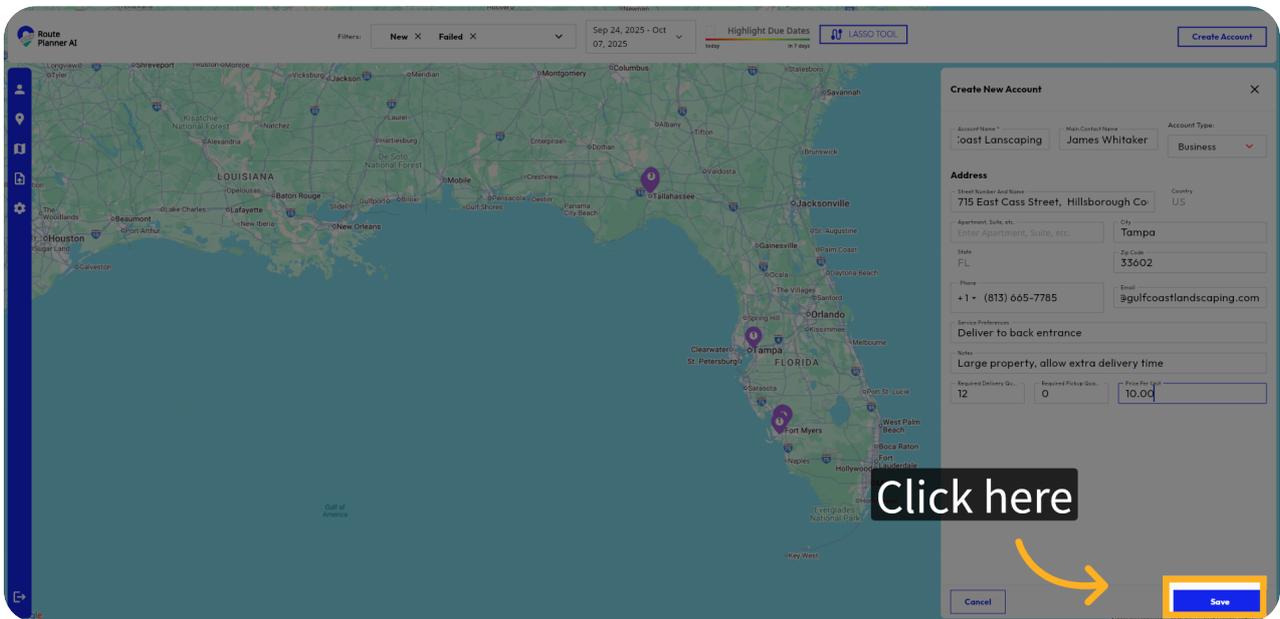
The screenshot displays the 'Route Planner AI' interface. On the left, a map of Florida is shown with various cities marked. A black box with the text 'Go here' is overlaid on the map. On the right, a 'Create New Account' form is visible. The form includes the following fields:

- Account Name: Gulfcoast Landscaping
- Main Contact Name: James Whitaker
- Account Type: Business
- Address: 715 East Cass Street, Hillsborough Co, Tampa, FL 33602
- Phone: +1 (813) 665-7785
- Email: @gulfcoastlandscaping.com
- Service Preferences: Deliver to back entrance
- Notes: Large property, allow extra delivery time
- Required Delivery Qty.: 12
- Required Pickup Qty.: 0
- Price Per Unit: 10

Buttons for 'Cancel' and 'Save' are located at the bottom of the form.

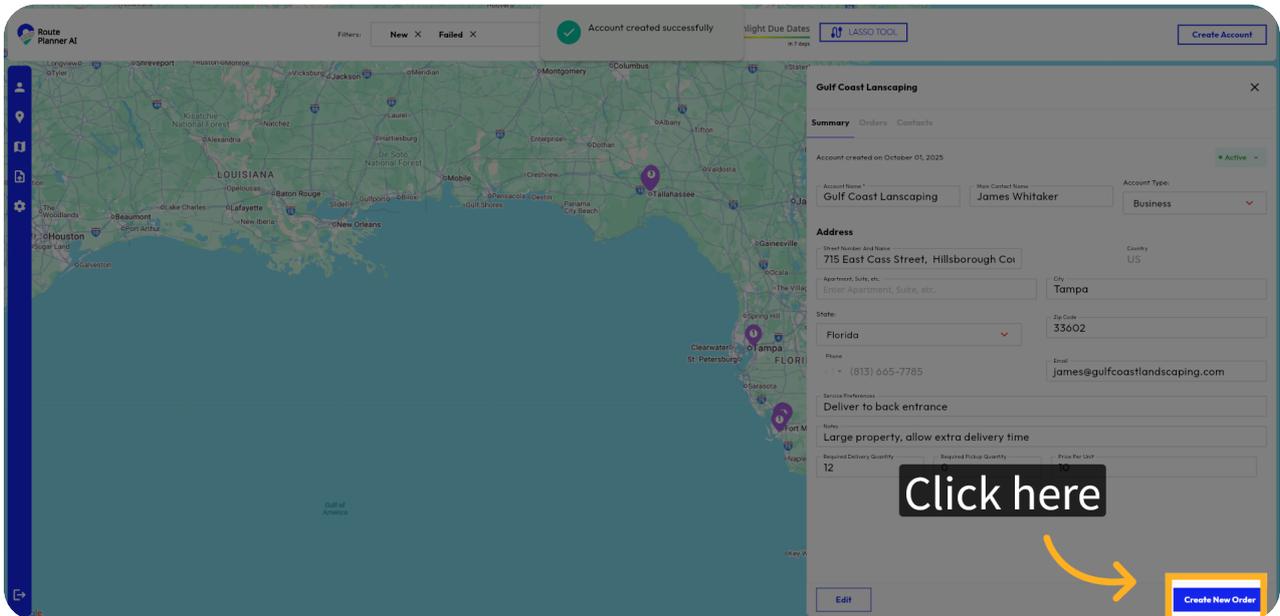
## 09 Click Save

Once you've entered the details, click Save at the bottom of the screen.



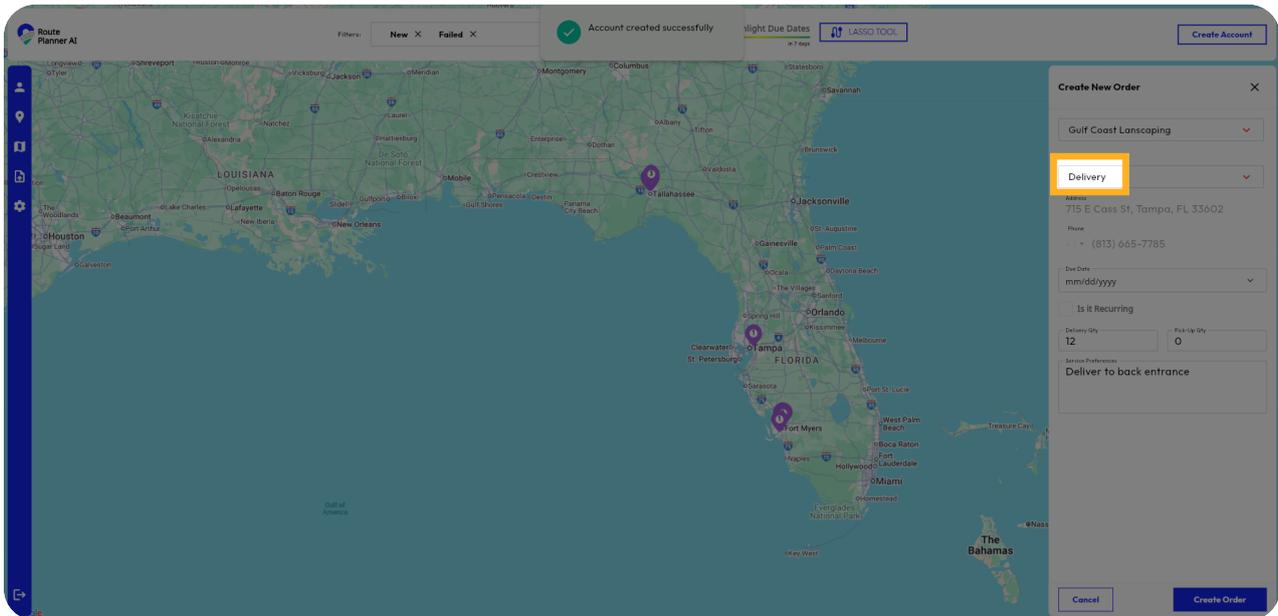
## 10 Create New Order

Now that you've created your first Account, you can create an Order. Click the Create New Order button.



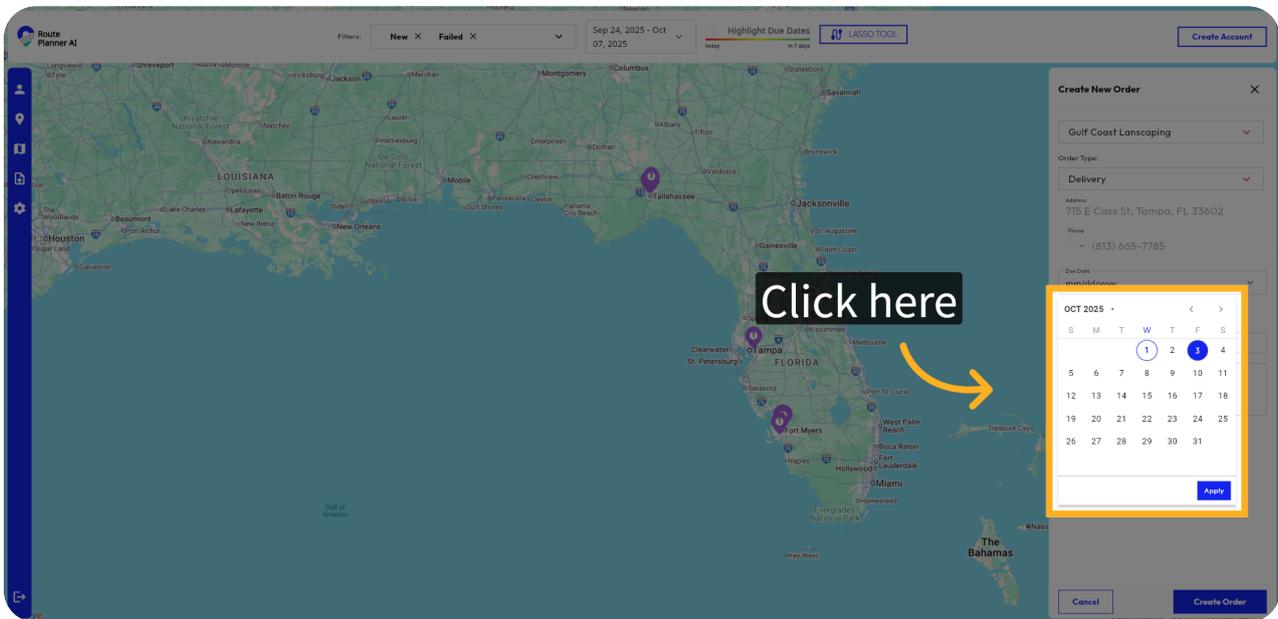
## 11 View the Order Type

The Order Type will default to your company's personalization setting, but you can change it if needed. The options are: Delivery – dropping off items. Pickup – collecting items. Delivery and Pickup – handling both at the same stop. Task – a visit without delivery or pickup.



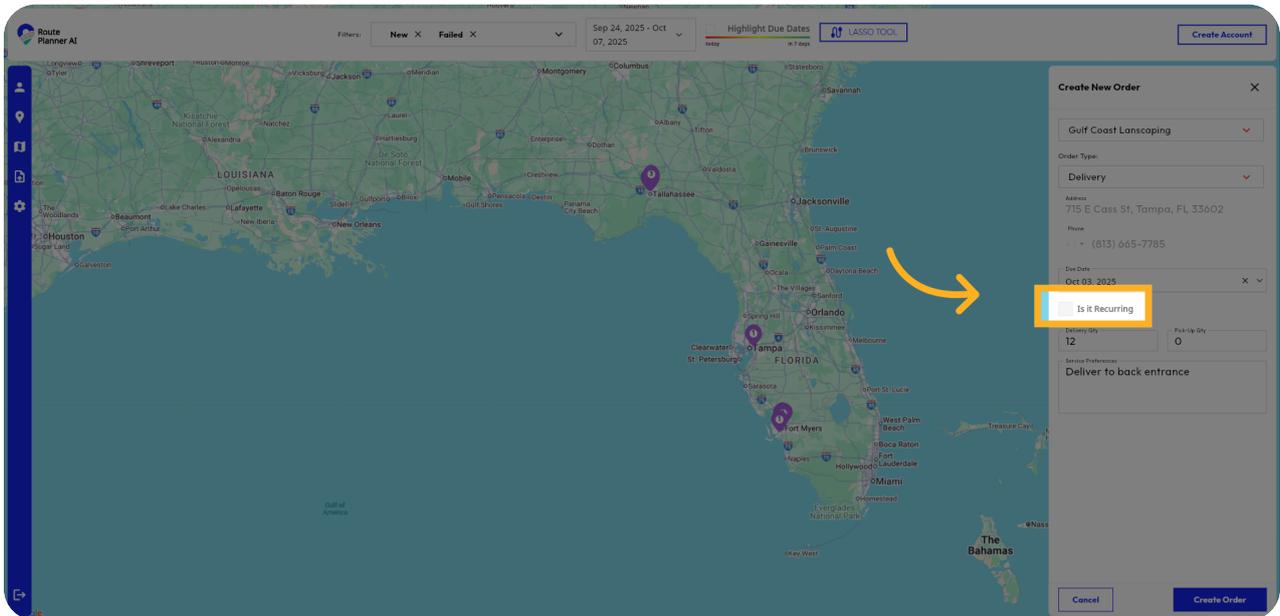
## 12 Select Order Due Date

Next, choose the Due Date for the order and click Apply.



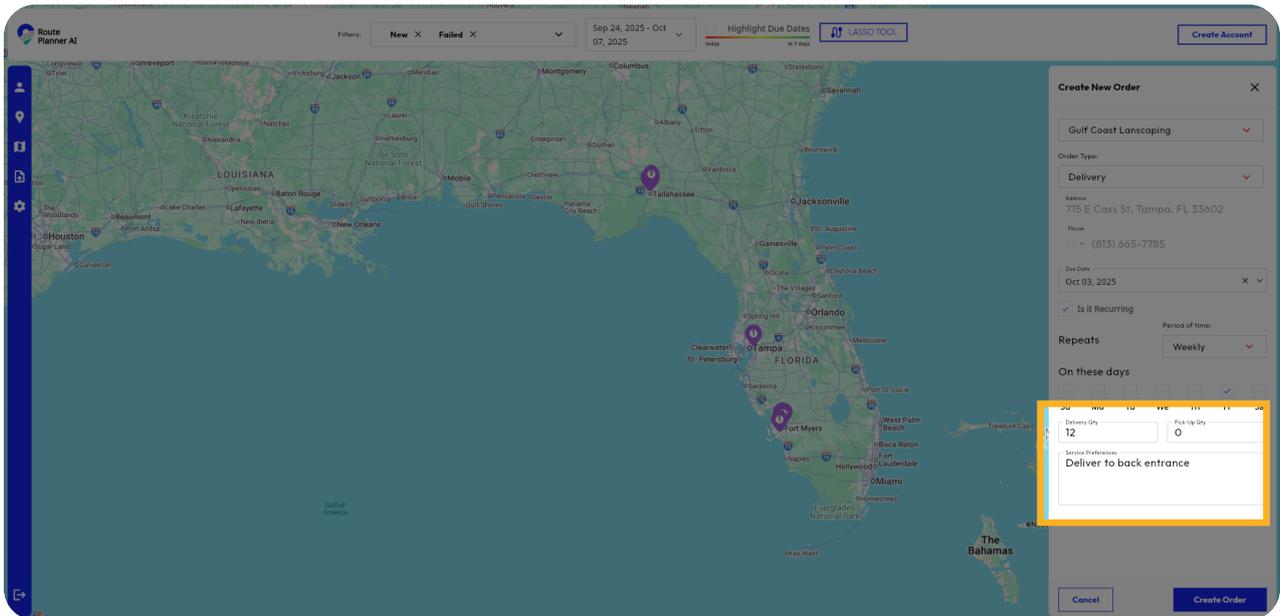
### 13 If needed, select Recurring

If you want to create a recurring series of orders, check the Recurring box, then set the frequency and days of the week.



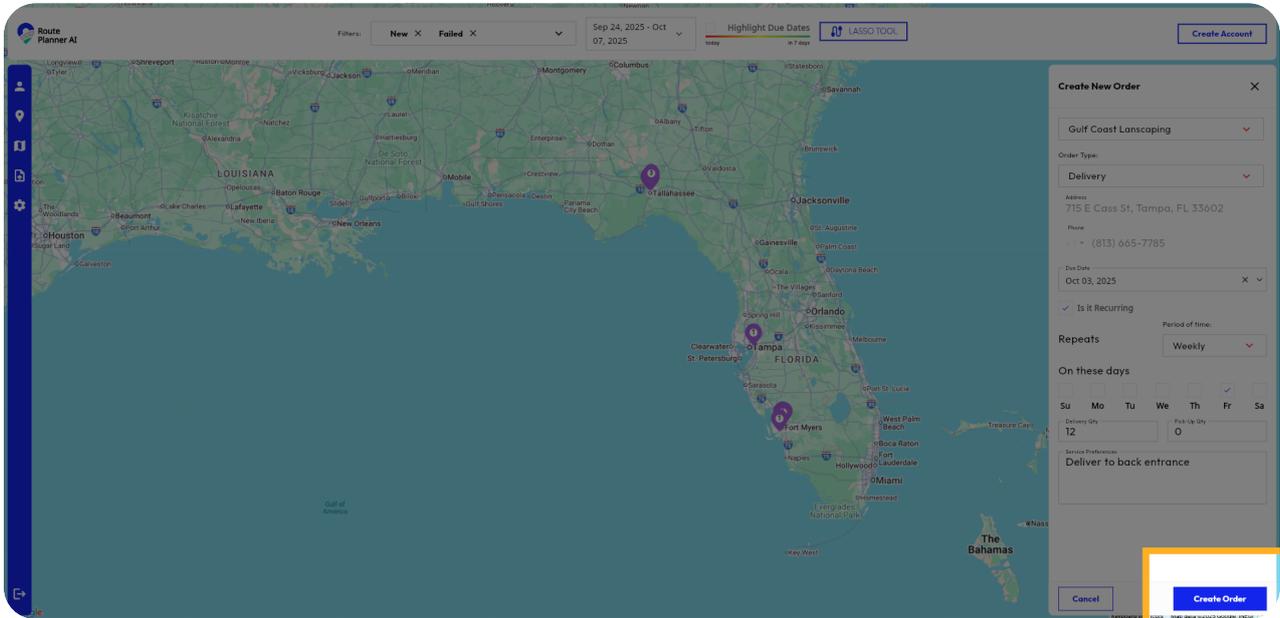
## 14 Quantity information and Service Preferences

Quantity information and Service Preferences will get copied from the Account level, you can edit these for each order if needed.



## 15 Click Create Order

Click Create Order to create the Order



## 16 Click here

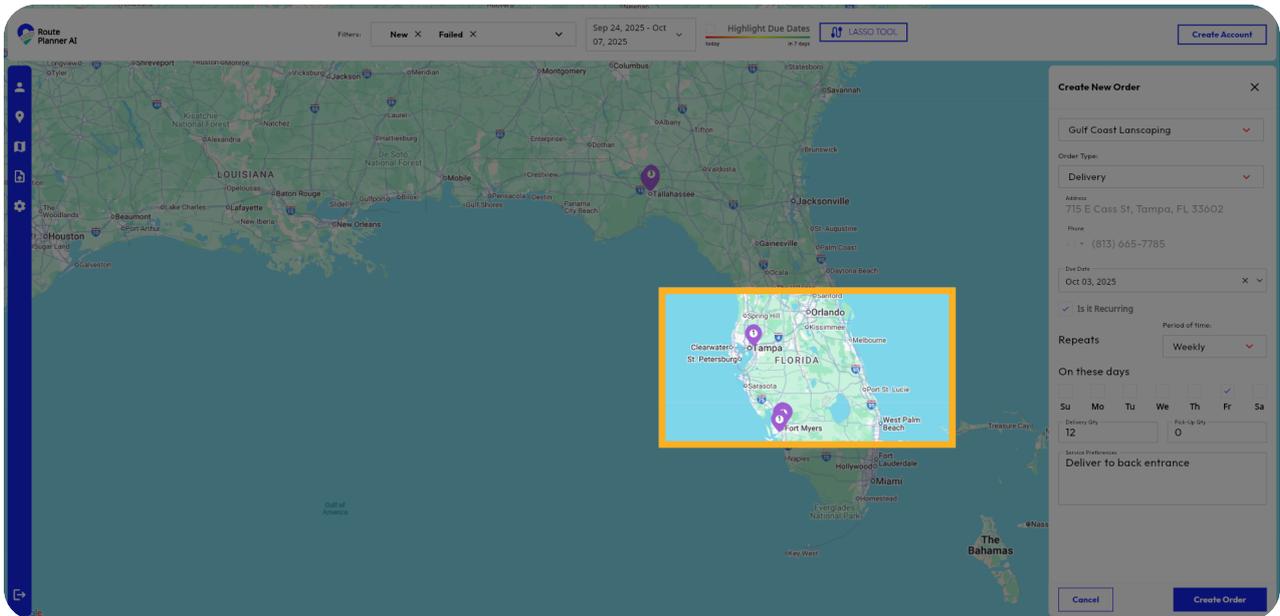
The new Order will appear in the Orders tab of the Account you have created

The screenshot displays the 'Route Planner AI' interface. On the left, the 'Accounts' panel shows a search for 'gulf coast' and a list of accounts, with 'Gulf Coast Landscaping' selected. The main map area shows a geographical view of the Gulf Coast region. On the right, a modal window titled 'Gulf Coast Landscaping' is open, showing the 'Orders' tab. The modal includes a 'Total Completed Orders' counter (0), filters for 'New' and 'Failed' orders, a date range selector (Sep 24, 2025 - Oct 07, 2025), and a search bar. Below the filters is a table with one order entry:

Order ID	Address	Due Date	Order Status	Delivery Qty
68a9P30x12ec29F2 8b575ee	775 East Cass Street, Hillsborough County, Tampa, FL, 33560 2-02-07700-00-00, 0002	October 03, 2025	New	0 / 12

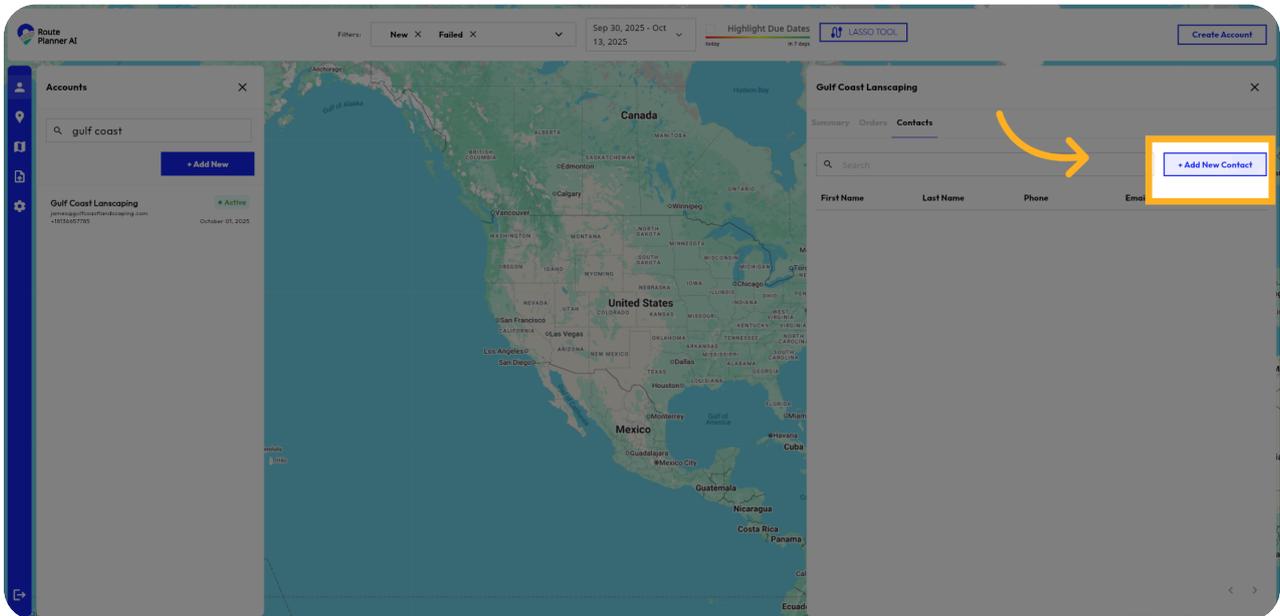
## 17 View Order on Map

The Order will now appear on your Map View as a pin. The map shows all orders due within the selected date range. The number displayed on each pin corresponds to how many orders exist at that address within the filtered period.



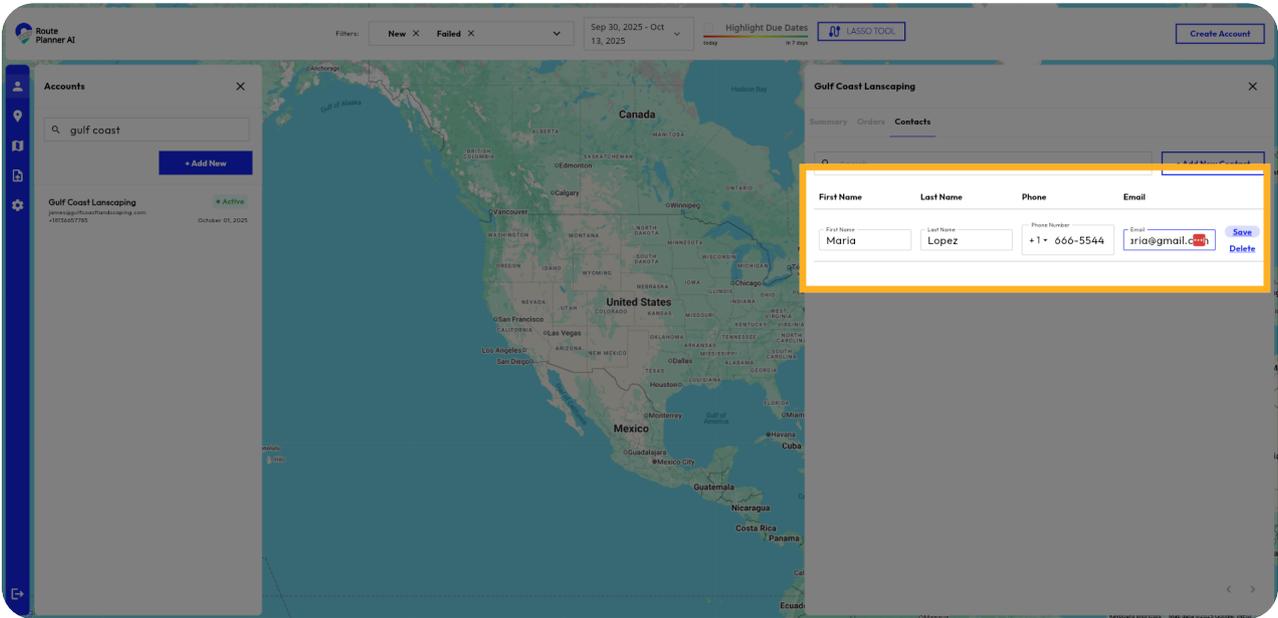
## 18 Create a Contact

You can also create additional contacts for the Account by clicking the Contacts tab and then 'Add New Contact'



## 19 Input Contact Details

Input the Contact details and click Save



## 20 View Accounts

To find other Accounts in the system, you can click on the person icon on the left and then use the search to find the account you are looking for. You can also add a New Account from this list view by clicking the 'Add New' button

