Moving a Customer Under Sub-Contractor Account

As a contractor, you might have a sub-contractor or more set up in your account (e.g; property manager). In some cases, you may need to move a specific customer under their account so you both can manage. Using your MULTI-SITE MANAGER feature, you can **MOVE** a customer to a sub-contractor account with just a few short steps.

Please view the steps below to make these changes (e.g.: John Smith).

Step 1

Step 2

the upper right-hand side, then MY CUSTOMERS. If using a PC, click on the MULTI-SITE MANAGER ... icon on the upper right-hand side, then MY CUSTOMERS.

Click on the MULTI-SITE MANAGER ... icon on Scroll down to my customer's section and select the CUSTOMER name that will be moved.

Step 3

Click on the THREE-DOT icon next to the controller name. Select MOVE CUSTOMER (e.g. John Smith)

Select the sub-contractor account to which you're moving the controller and click MOVE.

Step 4

The customer is now under a sub-contractor (San Marco Landscapes, Inc.) and both companies can now manage.