



How do I add a new customer?

Adding a **New Customer** will allow you as the contractor to manage their software account from your **Multi-Site Manager (MSM)** (). This will assist you with determining alarm messages that need attention, incorrect water usage (if a flow meter is installed), plus much more. The videos below will walk you through the steps on your mobile device for setup.

English	Spanish

Steps

1.

Click on the **Multi-Site Manager** () on the upper right-hand side.
2.

Next, click **Add New Customer**.
3.

Enter the customer's **Email Address** or search for an existing customer account using a serial number. If you don't have this information, click **Skip**. You can add their email at a later time when you do have information readily available. [Learn more](#) ^[1]
4.

Click **Next**.
5.

If the customer already set up an account, you will be prompted to click **Request Access**. This will send the customer an email asking for access to manage their controller.
6.

If your customer doesn't have an account, please enter the **Email Address** requested by the customer. You'll then be able to create an account immediately.

Selections	Descriptions
Customer's Email	The email address that the customer will use to log in to their account
Customer's Name	The customer's name
Type of User	<div><div>• If you want your customer to have full control over their system, select "Can modify configuration and run zones."</div><div>• If you don't want your customer to change their configuration, select "Can view configuration, manually run zones."</div></div>
Send Notifications To	Choose where to send emails about controllers being offline or plans to require renewal. This can be either your email address or your customer's email address.

Send activation email to me instead of customer's email address	If you don't want the customer to receive an account activation email, check this box and the activation email will not be sent to the homeowner.
---	---

Once you click **CREATE**, you'll be taken through a wizard to set up your customer's controller. The controller will be linked to your account. Your new customer will then be visible in your list of customers in your [My Customer list](#).^[2] The homeowner will receive email notification automatically from Hydrowise to set up a password.