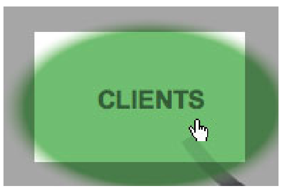
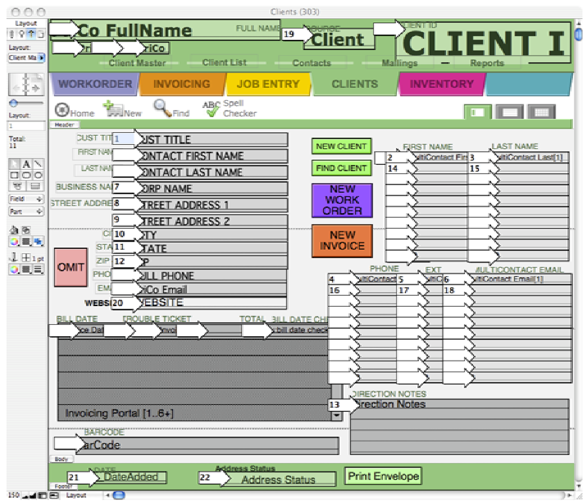
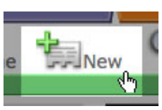
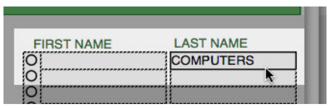
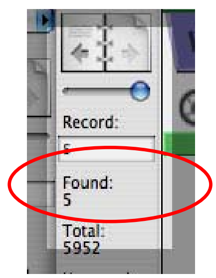
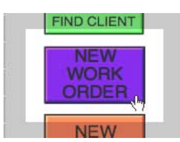
212 - ADD OR FIND A CLIENT

Client records are kept in a FileMaker Pro database. To locate an existing client in that database, or to add a record for a new client, perform the steps in the following table.

Action	Result
1. Go to the “green” (client information) part of the system. 	The system displays the **CLIENT** database screen: 
2. **If the client is an existing client, skip to step 5.** Otherwise, click **New:** 	The system begins a new client record.
3. Enter the new client’s information into the screen fields. Use the **Tab** key to access fields. The tab order of fields is indicated by the numbered arrows on the screen (above).	The screen fields fill in with the entered information. **Note:** You MUST verify the client’s address, phone number, email address, and referral information. **Note:** Use no abbreviations in the client’s address. For example, enter “Avenue” instead of “Ave.” and “North,” not “N.”
4. Press **Enter** to save the client information.	
5. To enter a work order for the client you just added, skip to step 10.	

Action	Result
6. To find an existing client, click **Find:** 	
7. Type pertinent information (usually a first name, a last name, or both) into appropriate fields: 	
8. Press **Enter** to start the search for client records that match the information entered.	The system displays the first matching record. The number of matching records found displays in the tool bar on the left side of the screen: 
9. If necessary, use the scroll wheel on your mouse to page through the matching records until you find the client record you are looking for.	
10. To enter a work order for the client, click **New Work Order:** 	The system displays the WORKORDER screen.