

Manual Client Account Creation Step-By-Step

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Why would I need to do this? Though we do not encourage adding contacts to Simply Home for use as a CRM, if you would like to offer the Homeowner Dashboard to existing clients or leads, you can. The following steps will show you how.

Step 1: Go to the “Contacts” tab on the left-hand side.

Step 2: Make sure you have the “My Contacts” tab selected and, in the top-right corner, click “Add New Contact +”

Step 3: Enter the contact’s information. At a minimum, you need to include the email of that client.

If you do not add the contact’s address here, they will be prompted to add it after they receive the email to accept the account.

Step 4: Click “Yes” under “Do you want to send an invitation to this contact?”

Step 5: Be sure to notify your client that the invitation is coming (usually within a few moments). To be safe, remind them to check all of their inboxes, including spam. Here is a preview of the email they will receive.

