Start with a verb: "Create a new customer record"

Owner		**Last reviewed**	
Review again		**Video**	

When to use it

Before you start

Steps

#	Do this	Notes: what to watch for, why
1		
2		
3		
4		
5		
6		

Done when

- ☐
- ☐

If something's different

If	Then

Questions

Ask: _____ If a step is unclear or wrong, tell the owner so this page gets fixed.

Changes

Date	What changed	By

Create a new customer record

Example, with made-up details

Owner	Operations manager	**Last reviewed**	November 10, 2026
Review again	When the CRM or the handoff rule changes	**Video**	Training video: Customer setup (in the Operations library)

When to use it

An approved agreement is ready for onboarding.

Before you start

- The approved agreement
- The customer's contact details
- Access to the CRM's Accounts and Quotes

Steps

#	Do this	Notes: what to watch for, why
1	Open Accounts and click New account	Search first, so you don't make a second record
2	Enter the company name, contact and email from the agreement	Copy them from the agreement, not from an email
3	Set the plan and start date	From the agreement's first page
4	Assign the account manager	The one named in the agreement
5	Add a note: "Agreement approved" and the date	
6	Click Save, then Send to account manager	This records the handoff

Done when

- [ ] Every required field is filled in
- [ ] The handoff shows in the account's activity

If something's different

If	Then
Details are missing or don't match the agreement	Send it back to the operations manager; don't guess
The customer already has a record	Update that record instead, and tell the account manager

Questions

Ask: the operations manager. If a step is unclear or wrong, tell the owner so this page gets fixed.

Changes

Date	What changed	By
Nov 10, 2026	First version	Operations manager