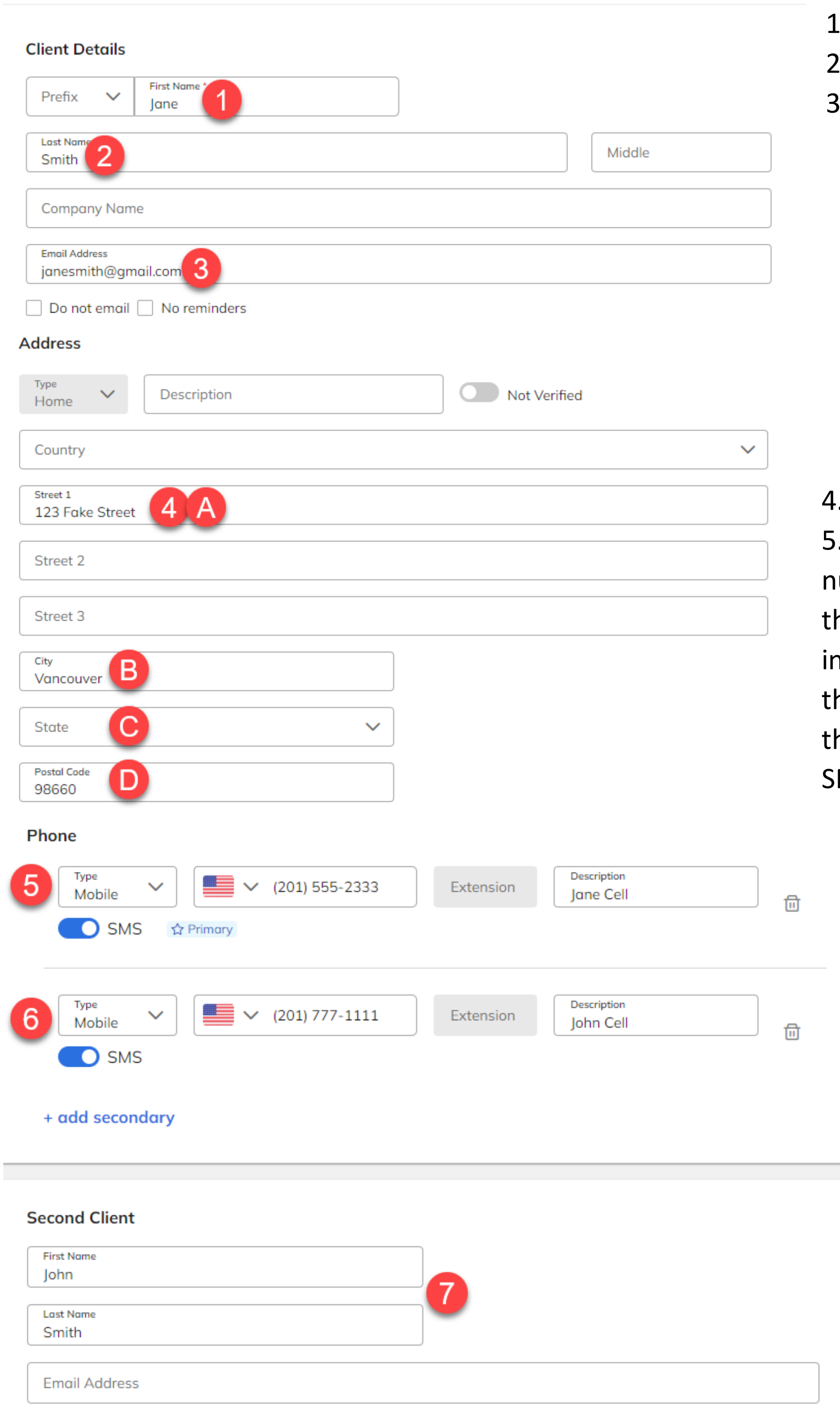
# Inputting Client Information

When adding a new client or updating an existing one, it's essential to enter all required information in the correct fields. Missing or misplaced information can prevent reminders and client communications from being sent.




1. Primary client first name
2. Primary client last name
3. Primary client email address
   a. Do not put in a fake email address. If the client does not want to provide their email address, please inform them that this is needed for invoices and patient reminders. If they still decline, select DO NOT EMAIL.
4. A – D add in client address
5. Primary client phone number. It is necessary to select the type (mobile vs home), add in the phone number, put who the phone number belongs to in the description, and mark if it's SMS capable. The first phone number you input will be automatically marked as the primary number on the account so make sure it belongs to the primary client.
6. Add in the secondary client phone number (if applicable).
7. Secondary client on the account. Do not just put a first name – if there is no last name, they will not show up on the medical record.