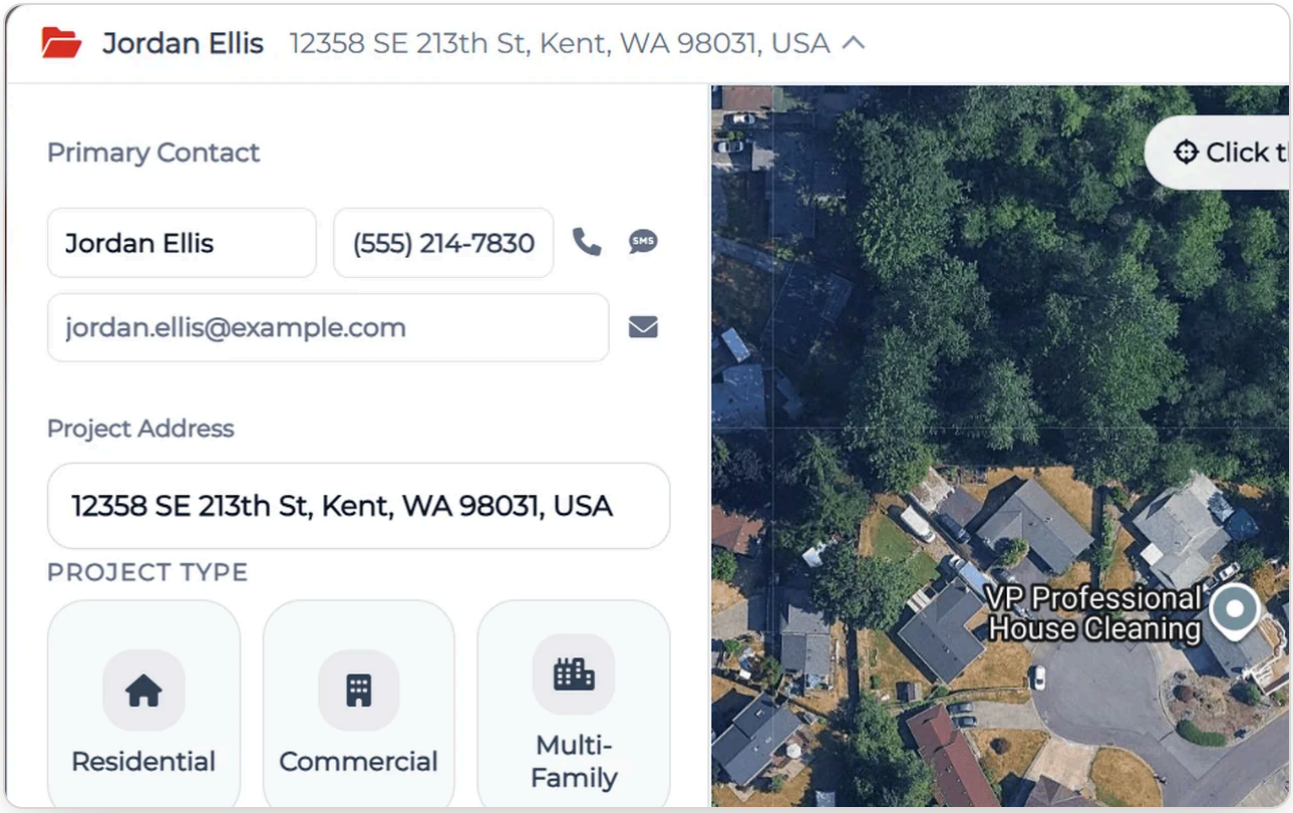
Add customer info and internal notes

Primary contact

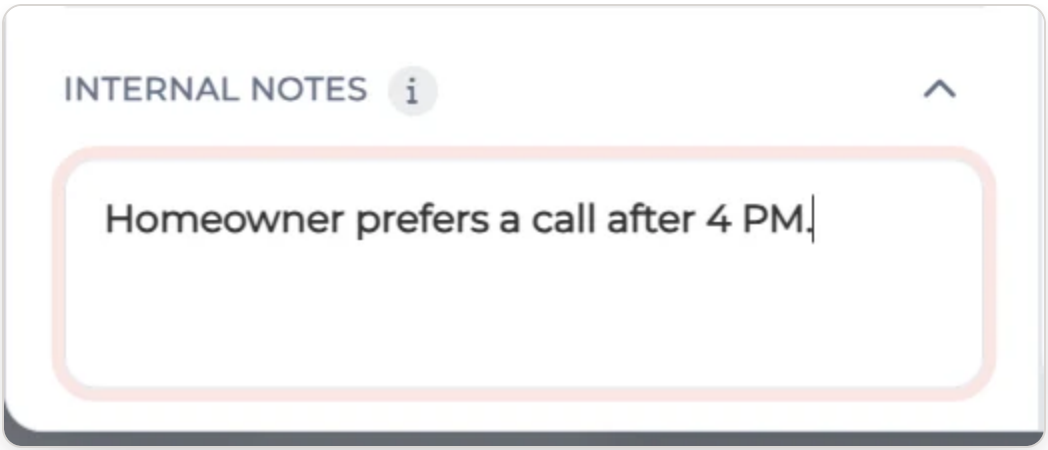
Enter the customer's **Name**, **Phone** and **Email** under **Primary Contact** at the top of the order window. The name and the project address appear in the window's title bar, so you can find the project quickly later.



Tip When **Customer info** is on in your report settings, the customer's name and the property address print on the cover of the customer PDF. Turn it on in settings under **Reports**.

Internal notes

Internal Notes sits at the bottom of the order window. These notes are purely for internal use: they aren't displayed on any report and aren't sent to anyone. Use them for follow-up reminders, scheduling details or anything else your team wants to remember about the project.



Questions

Is a contact required to order a report?

No. We only need the address and pins. A contact helps you find the project and can print on the customer PDF.

Who can see Internal Notes?

Only your team, on the project. Internal Notes aren't displayed on any report and aren't sent to anyone.

More guides: 1m8.ai/help-center
Scan the code or type the address.

Order at **app.1m8.ai**
Questions? Email **support@1m8.ai**