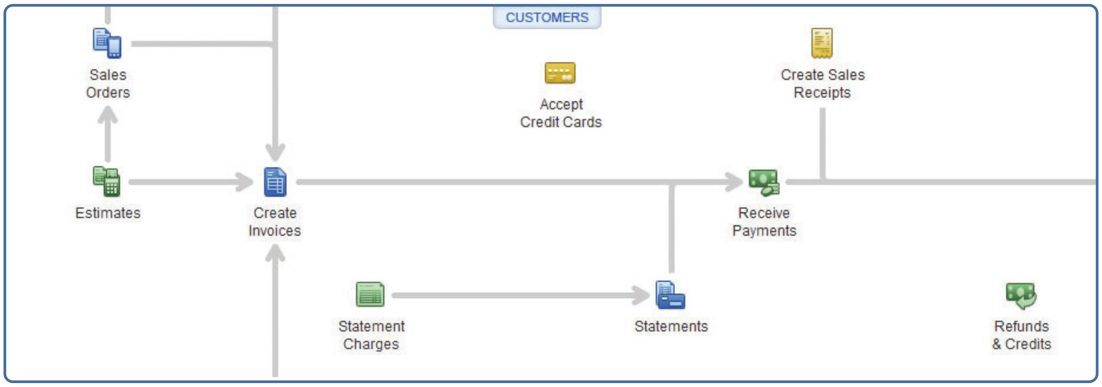
Customer Maintenance

The table below and the two tables on the following page include instructions to add a customer record, change information for an existing customer, and delete a former customer's record. The *QuickBooks* windows for these maintenance activities are shown on pages 62 and 63.



Add a Customer Record Quick Reference Table

Box or Other Location	Procedure
Home Page	Click the Customers icon to display the Customer Center.
Customers & Jobs Tab	Click the Customers & Jobs tab if it is not already open.
New Customer & Job button	Click the New Customer & Job button. Select New Customer to open the New Customer window.
Customer Name	Enter the name of the customer.
Opening Balance	Do not enter. Will be done later if there is a balance.
As of	Enter date the customer is added.
Remainder of Address Info tab	Complete the remaining boxes to the extent that the information is available. Some boxes may not be applicable for the customer. For the Address Details section, you can use the Copy button if the Ship To address is the same as the Invoice/Bill To address.
Payment Settings tab	Select the Payment Settings tab. Complete the boxes to the extent that the information is available. Some boxes may not be applicable for the customer.
Sales Tax Settings tab	Select the Sales Tax Settings tab. Complete the boxes to the extent that the information is available. Some boxes may not be applicable for the customer.
OK button	Click the OK button to save the new customer information and close the window.

Change Information in An Existing Customer's Record Quick Reference Table

Box or Other Location	Procedure
Home Page	Click the Customers icon to display the Customer Center.
Customer Center	Click the Customers & Jobs tab to display the customer list.
Customer List	Right-click on the customer name that is to be changed and select Edit Customer: Job to open the Edit Customer window.
Edit Customer window	Change appropriate information in the windows for the Address Info, Payment Settings, and Sales Tax Settings tabs.
OK button	Click the OK button to save the edited customer information and close the window.

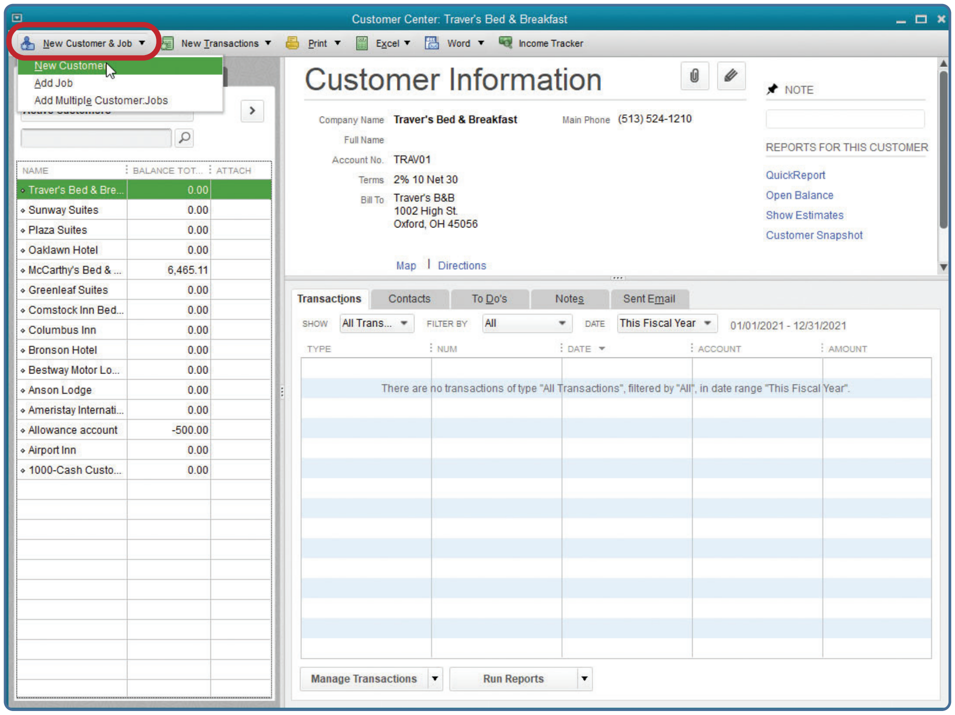
Delete a Former Customer's Record Quick Reference Table

Box or Other Location	Procedure
Home Page	Click the Customers icon to display the Customer Center.
Customer Center	Click the Customers & Jobs tab to display the customer list.
Customer List	Right-click on the customer name that is to be deleted and select Delete Customer: Job. (*Note:* Be sure you want to delete the customer record before you do so. If you want that customer included later, you will need to find and reenter the information as you would for a new customer following the guidance in Add a Customer Record – Quick Reference Table.) Click OK to delete the customer, or click Cancel if you choose not to delete the customer.
QuickBooks message	If the account is associated with at least one transaction in the current year or has a prior balance, a warning message will appear. Either click Cancel to cancel the attempted deletion or click the Make Inactive button. If you choose to inactivate the customer, click Yes if you receive a message saying that the customer has an outstanding balance. Making a customer inactive only eliminates that customer from view when Active Customers are shown in QuickBooks. It does not delete the customer entirely.

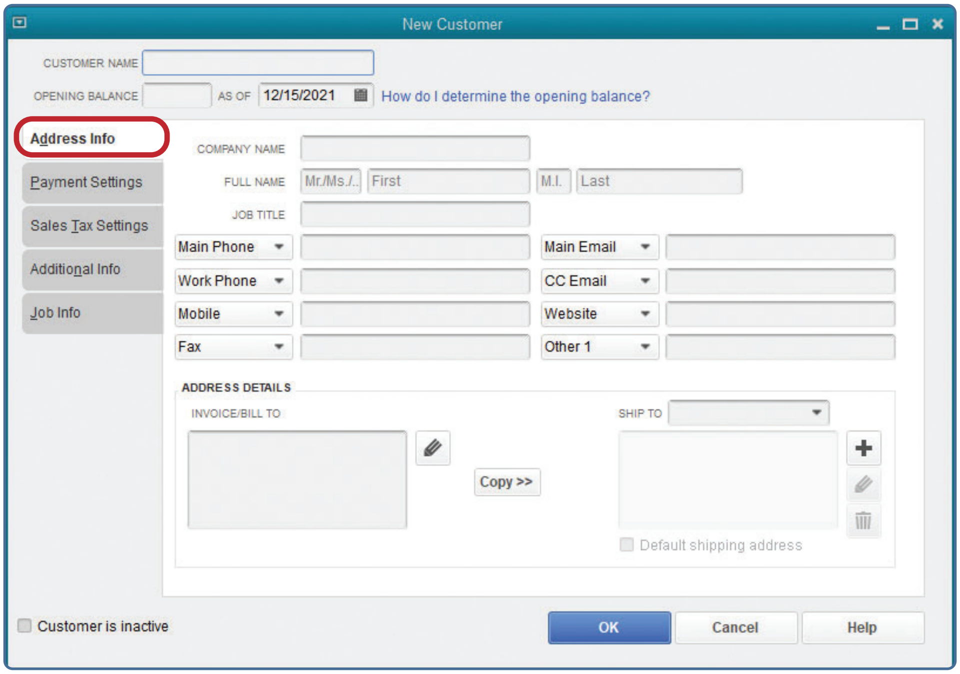
Customer Maintenance

QuickBooks windows

Customer Center → Customers & Jobs Tab → New Customer & Job → New Customer



New Customer Window—Address Info Tab

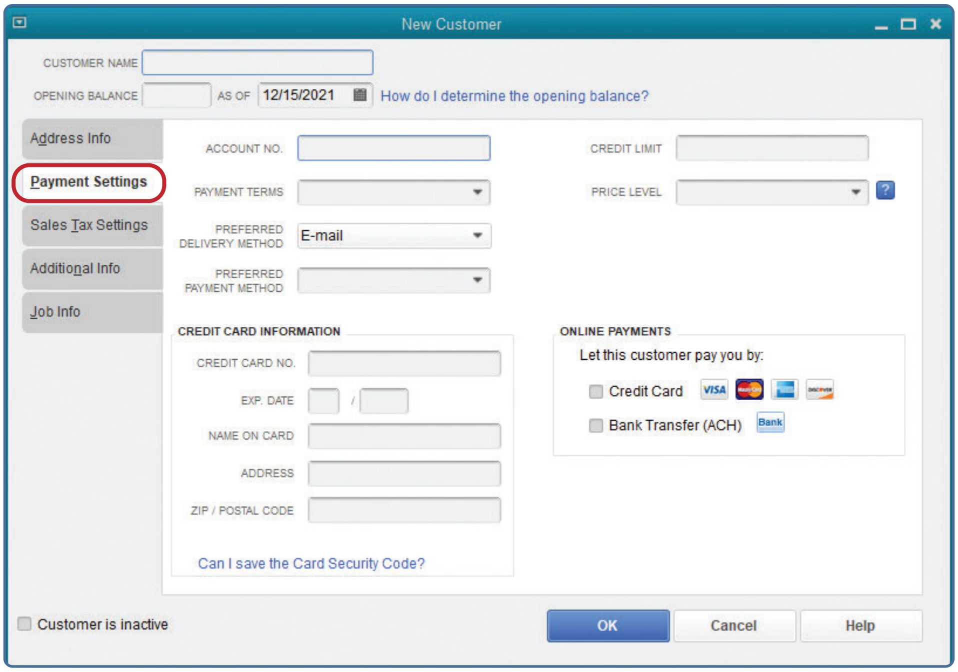


(windows continued on the following page)

Customer Maintenance

QuickBooks windows *(continued)*

New Customer Window—Payment Settings Tab



New Customer Window—Sales Tax Settings Tab