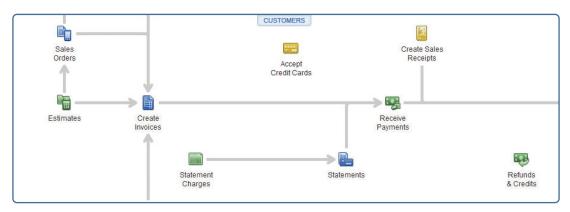
# **Customer Maintenance**

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. ( <i>Note:</i> 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.			
<i>QuickBooks</i> 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  $\rightarrow$  Customers & Jobs Tab  $\rightarrow$  New Customer & Job  $\rightarrow$  New Customer

Were Customer & Job     Add Job   Add Mitripic Customer_Jobs     NAME   BALANCE TOT ATTACH     IMAME   BALANCE TOT ATTACH     Company Harro   Traver's Bed & Breakfast   Main Phone   (513) 524-1210   REPORTS FOR THIS CUS   Account No.   Traver's Bed & Breakfast   Main Phone   (513) 524-1210   REPORTS FOR THIS CUS   Account No.   Traver's Bed & Breakfast   Main Phone   (513) 524-1210   REPORTS FOR THIS CUS   Account No.   Traver's Bed & Breakfast   Main Phone   (513) 524-1210   REPORTS FOR THIS CUS   Account No.   Traver's Bed & Breakfast   Main Phone   (513) 524-1210   REPORTS FOR THIS CUS   Account No.   Traver's Bed & Breakfast   Main Phone   (513) 524-1210   REPORTS FOR THIS CUS   Account No.   Traver's Bed & Breakfast   Main Phone   (513) 524-1210   REPORTS FOR THIS CUS   Account No.   Traver's Bed & Breakfast   Other States   OuterStates   OuterStates   OuterStates   OuterStates   Company Harrow   Company Harrow   Traver's Bed & Breakfast   Main Phone   (10) 12021-12/31/2021   Type   I
Add Multiple Customer Jobs <ul> <li>Add Multiple Customer Jobs</li> <li>Add Multiple Customer Jobs</li> <li>Company Name</li> <li>Traver's Bed &amp; Breakfast</li> <li>Pinzas Stutes</li> <li>O 000</li> <li>Pinzas Stutes</li> <li>O 000</li> <li>Addamm Hotel</li> <li>O 000</li> <li>Macadam Hotel</li> <li>O 000</li> <li>Macadam</li></ul>
Contrading Index Solid's Blackads     Intel Solid's Blackads     Intel Home     Childran (Index Solid's Blackads)     Intel Home     REPORTS FOR THIS CUS       NAME     EBALANCE TOT. : ATTACH     Account No. TRAV01     OutdReport     OutdReport       Stanway Suites     0.00     Bit To Traver's Bad     Open Balance     Open Balance       • Pizas Suites     0.00     McCantry Bed & 6.465.11     Open Balance       • McCantry Bed & 6.465.11     Map 1 Directions     Customer Snapshot       • Combus Inn     0.00     Hall Home     Contracts       • Combus Inn     0.00     Hall Home     Show Zetimates       • Combus Inn     0.00     Hall • Date     Transactions of type "All transactions", filtered by "All", in date range "This Fiscal Year".       • Allowance account     - 500.00     There are no transactions of type "All transactions", filtered by "All", in date range "This Fiscal Year".       • Allowance account     - 500.00
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Bestway Motor Lo     0.00     Anson Lodge     0.00     Anson Lodge     0.00     Anorace account     -500.00     Altware account     -500.00     -5
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Allowance account -500.00     Alirport Inn 0.00
+ Airport Inn 0.00
• 1000-Cash Custo 0.00
Manage Transactions V Run Reports V

#### New Customer Window—Address Info Tab

			New Cu:				_ 🗆 ×
CUSTOMER NAME	AS OF 12/15	/2021 🏢	]   How do I de	termine the	opening balance?		
A <u>d</u> dress Info	COMPANY NAME						
Payment Settings	FULL NAME	Mr./Ms./	First		M.I. Last		
Sales <u>T</u> ax Settings	JOB TITLE						
Additional Info	Main Phone 🔹 Work Phone 🔹				Main Email  CC Email		
Job Info	Mobile •				CC Email •		
	Fax 🔹				Other 1 🔹		
	ADDRESS DETAILS		V	Сору >>	SHIP TO		•
					🗖 Defau	lt shipping address	Ŵ
Customer is inactiv	e				ОК	Cancel	Help

(windows continued on the following page)

# **Customer Maintenance**

#### QuickBooks windows (continued)

New Customer Window—Payment Settings Tab	

	New Customer		_ — ×
AS OF 12/15	5/2021 📓 How do I determine	the opening balance?	
ACCOUNT NO.		CREDIT LIMIT	
PAYMENT TERMS		PRICE LEVEL	• ?
PREFERRED DELIVERY METHOD	E-mail 🝷		
PREFERRED PAYMENT METHOD	-		
CREDIT CARD INFOR	MATION	ONLINE PAYMENTS	
CREDIT CARD NO.		Let this customer pay you by:	
EXP. DATE		Credit Card VISA 🧱	<b>E</b>
NAME ON CARD		Bank Transfer (ACH)	ank
ADDRESS			
ZIP / POSTAL CODE			
Can I save the	Card Security Code?		
		OK Cancel	Help
	ACCOUNT NO. PAYMENT TERMS PREFERRED DELIVERY METHOD PREFERRED PAYMENT METHOD CREDIT CARD INFOR CREDIT CARD INFOR CREDIT CARD NO EXP. DATE NAME ON CARD ADDRESS ZIP / POSTAL CODE	AS OF 12/15/2021 III How do I determine ACCOUNT NO. PAYMENT TERMS PREFERRED PREFERRED PREFERRED PREFERRED PREFERRED PREFERRED PREFERRED PREFERRED	AS OF 12/15/2021 How do I determine the opening balance?  ACCOUNT NO.  PREFERRED PREFERRED PREFERRED PREFERRED PREFERRED CREDIT CARD INO.  EXP. DATE () DATE ) CREDIT CARD NO.  EXP. DATE ) CREDIT CARD NO.  CREDIT CARD NO.  EXP. DATE ) CREDIT CARD NO.  CREDIT CARD

#### New Customer Window—Sales Tax Settings Tab

			New Customer			_ = ×
CUSTOMER NAME	AS OF 12/15/2021	100	] How do I determine the ope	ning balance?		
A <u>d</u> dress Info	TAX CODE			2		
Payment Settings	TAX ITEM		-	]		
Sales <u>T</u> ax Settings	RESALE NO.			]		
Additio <u>n</u> al Info						
Job Info						
Customer is inactive				ОК	Cancel	Help
				ок	Cancel	Неір