

Customer Maintenance

Customer maintenance includes adding a customer record, changing information for an existing customer, and making a customer's record inactive. The three maintenance tasks are covered in detail on the following pages, including *QBO* windows.

Add a Customer Record – Quick Reference Table

Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Sales → Customers to open the customer listing.
B	New Customer button	Click the New Customer button in the customer listing to open the Customer window .
C	Company name*	Type the customer's name.
D	Email, Phone, Mobile, Fax, Other, and Website boxes*	Type the customer's various contact and website information, to the extent available.
E	Addresses section	Complete the Billing address information. If the shipping address is different, uncheck the Same as billing address check box and complete the Shipping address information.
F	Primary payment method**	If the customer has a primary method of payment (check, ACH, credit), select the method.
G	Terms**	Select the default payment terms for the customer.
H	Customer type***	Select the customer type, if applicable.
I	Opening balance***	Type the customer's opening balance, even if it is 0
J	As of***	Select the date of the opening balance for the customer.
K	Customer window (all sections)	Review the information in all sections of the Customer window to verify that it is correct.
L	Save button	Save the new customer record and close the window.

* Name and contact section.

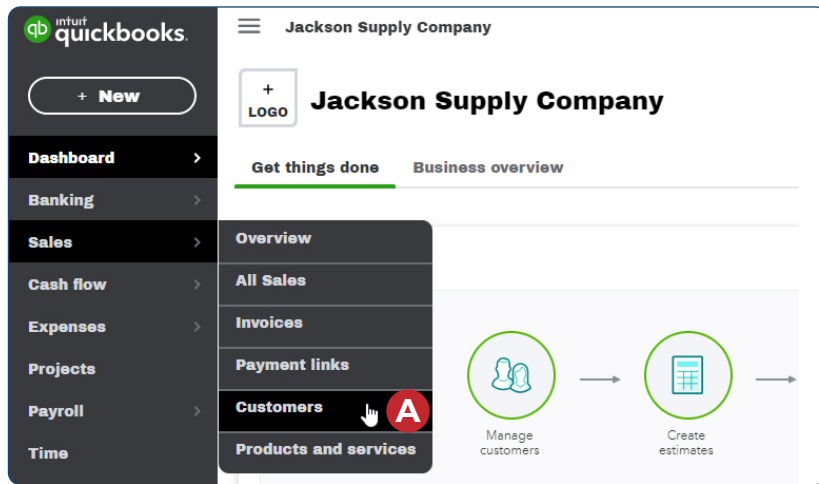
** Payments section.

*** Additional info section.



Add a Customer Record

QBO windows



Sales

Overview All Sales Invoices Payment links **Customers** Products and services

Customers Customer types New customer **B**

Unbilled Last 365 Days Unpaid Last 365 Days Paid

\$0 0 ESTIMATE	\$0 0 UNBILLED ACTIVITY	\$0 0 OVERDUE	\$3,164 3 OPEN INVOICES	\$1,125 0 PAID LAST 30 DAYS
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Get automated tax and forms, tax penalty protection, integrated time tracking, 24/7 support, and more with QuickBooks Online Payroll.
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Batch actions Search

CUSTOMER / PROJECT ^ / COMPANY	PHONE	OPEN BALANCE	ACTION
<input type="checkbox"/> Airport Inn	(614) 896-1000	\$2,476.25	Receive payment
<input type="checkbox"/> Ameristay International	(614) 894-4500	\$0.00	Create Invoice
<input type="checkbox"/> Anson Lodge	(614) 894-5000	\$0.00	Create Invoice
<input type="checkbox"/> Bestway Motor Lodge	(614) 895-4000	\$0.00	Create Invoice
<input type="checkbox"/> Bronson Hotel	(440) 556-2700	\$0.00	Create Invoice



Add a Customer Record

QBO windows (continued)

Customer Window - Name and contact section

K

Customer [X]

Name and contact [i] [^]

Title	First name	Middle name	Last name	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Company name **C** Customer display name * [v]

Email	Phone number
<input type="text"/>	<input type="text"/>
Mobile number	Fax
<input type="text"/>	<input type="text"/>
Other	Website
<input type="text"/>	<input type="text"/>

Name to print on checks

Is a sub-customer

D

Customer Window - Addresses section

K

Addresses [location pin] [^]

Billing address

Street address 1	Street address 2
<input type="text"/>	<input type="text"/>
City	State
<input type="text"/>	<input type="text"/>
ZIP code	Country
<input type="text"/>	<input type="text"/>

[Map](#)

Shipping address

E Same as billing address

E

Add a Customer Record

QBO windows (continued)

Customer Window - Payments section

K

Payments ^

Primary payment method F ▼	Terms G ▼
Sales form delivery options Use company default ▼	Language to use when you send invoices English ▼

Customer Window - Additional info section

K

Additional info ^

Customer type
Select **H** ▼

Taxes

Exemption details

Opening balance ?

Opening balance I	As of MM/DD/YYYY J 📅
------------------------------------	--

Privacy

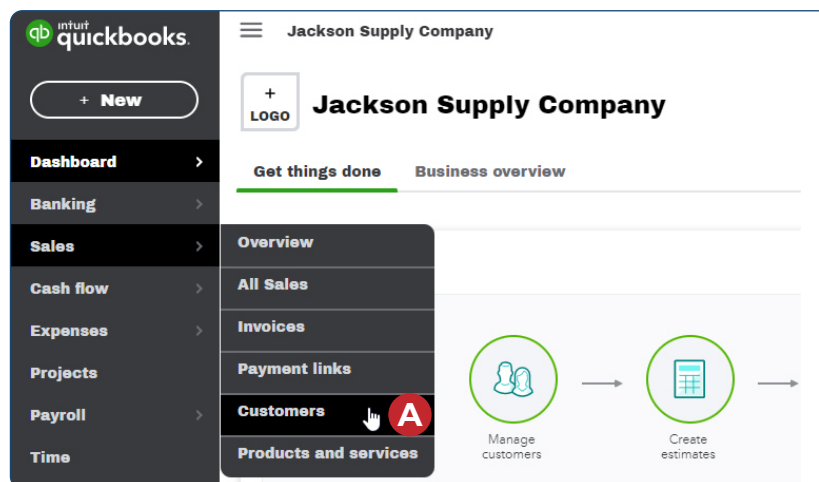
Save **L**

Change Information in an Existing Customer's Record – Quick Reference Table

Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Sales → Customers to open the customer listing.
B	Customer List	Locate the customer you want to edit and click the customer's name in the Customer/Project/Company column to open the customer's individual page.
C	Customer Details tab	Click the Customer Details tab to open detailed information for the customer.
D	Edit button	Click the Edit button to open the Customer window for the customer.
E	Customer window	Change appropriate information in the window. Review results for completeness and accuracy.
F	Save button	Save the revised customer record and close the window.

Change Information in an Existing Customer's Record

QBO windows



Change Information in an Existing Customer's Record

QBO windows (continued)

Sales

Overview All Sales Invoices Payment links **Customers** Products and services

Customers Customer types New customer

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Batch actions Search

CUSTOMER / PROJECT / COMPANY	PHONE	OPEN BALANCE	ACTION
<input type="checkbox"/> Airport Inn Airport Inn	(614) 896-1000	\$2,476.25	Receive payment
<input type="checkbox"/> Ameristay International Ameristay International	(614) 894-4500	\$0.00	Create Invoice
<input type="checkbox"/> Anson Lodge Anson Lodge	(614) 894-5000	\$0.00	Create Invoice
<input type="checkbox"/> ...ay Motor Lodge	(614) 895-4000	\$0.00	Create Invoice

Anson Lodge Edit New transaction

Anson Lodge | 8777 Vine, Columbus, OH 43216

Add notes

\$0.00 OPEN
\$0.00 OVERDUE

Transaction List **C*** Projects Customer Details Late Fees

Batch actions Filter

< First Previous 0-0 of 0 Next Last >

DATE	TYPE	NO.	MEMO	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
There are no transactions matching the criteria.								



< First Previous 0-0 of 0 Next Last >

*Note: See next page for Customer Details tab contents.



Change Information in an Existing Customer's Record

QBO windows (continued)

Anson Lodge   **D** [Edit](#) [New transaction](#) ▼

Anson Lodge | 8777 Vine, Columbus, OH 43216

[Add notes](#)

\$0.00
OPEN

\$0.00
OVERDUE

[Transaction List](#) | [Projects](#) | **[Customer Details](#)** | [Late Fees](#)

[Edit](#)

Customer	Anson Lodge	Billing address	8777 Vine Columbus, OH 43216
Email	SteveU@AnsonLodge.com	Shipping address	
Phone	(614) 894-5000	Terms	
Mobile		Payment method	
Fax	(614) 894-5055	Preferred delivery method	None
Other		Customer type	Retail Trade
Website	http://www.AnsonLodge.com	Customer language	
Notes	<input type="text" value="Add notes"/>	Tax reg. no.	

Attachments Maximum size: 20MB

Drag/Drop files here or click the icon

[Show settings](#)

See next page for additional window



Customer Window (with additional sections collapsed)

Customer E ×

Name and contact^

Title	First name	Middle name	Last name	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Company name		Customer display name *		
<input type="text"/>		<input style="border: 2px solid green;" type="text"/>		
Email	Phone number			
<input type="text"/>	<input type="text"/>			
Mobile number	Fax			
<input type="text"/>	<input type="text"/>			
Other	Website			
<input type="text"/>	<input type="text"/>			
Name to print on checks				
<input type="text"/>				
<input type="checkbox"/> Is a sub-customer				

Addresses∨

Notes and attachments∨

Payments∨

Additional info∨

Save F

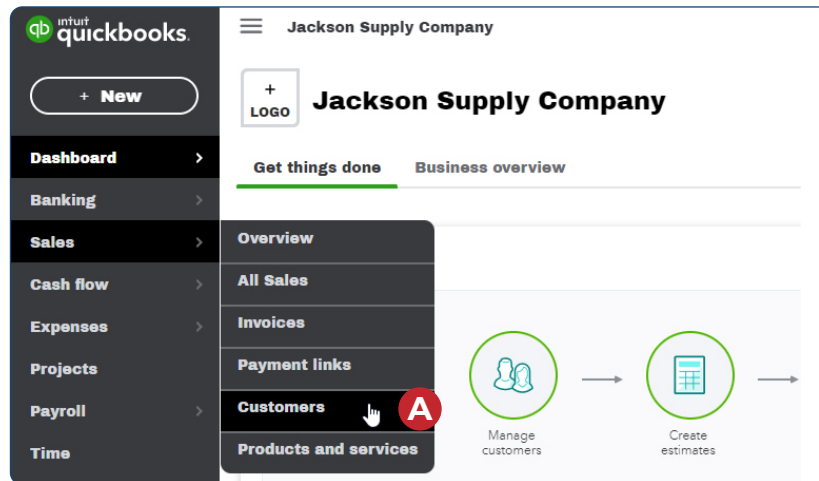


Make a Customer's Record Inactive – Quick Reference Table

Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Sales → Customers to open the customer listing.
B	Action column drop-down list button	Locate the customer you want to make inactive and click the Action column drop-down list button on that customer's line → select Make inactive . Note that this selection will not appear if the customer has open transactions.
C	QBO message	A message will appear that says "Are you sure you want to make [customer name] inactive?" Click the Yes button.

Make a Customer's Record Inactive

QBO windows



Make a Customer's Record Inactive

QBO windows (continued)

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CUSTOMER / PROJECT / COMPANY	PHONE	OPEN BALANCE
<input type="checkbox"/> Airport Inn	(614) 896-1000	\$2,476.25
<input type="checkbox"/> Ameristay International	(614) 894-4500	\$0.00
<input type="checkbox"/> Anson Lodge	(614) 894-5000	\$0.00
<input type="checkbox"/> Bestway Motor Lodge	(614) 895-4000	\$0.00
<input type="checkbox"/> Bronson Hotel	(440) 556-2700	\$0.00

- Create sales receipt
- Create estimate
- Send payment link
- Create charge
- Create time activity
- Make Inactive** B
- Create statement
- Create Invoice

! Are you sure you want to make Bestway Motor Lodge inactive?

No Yes C

