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

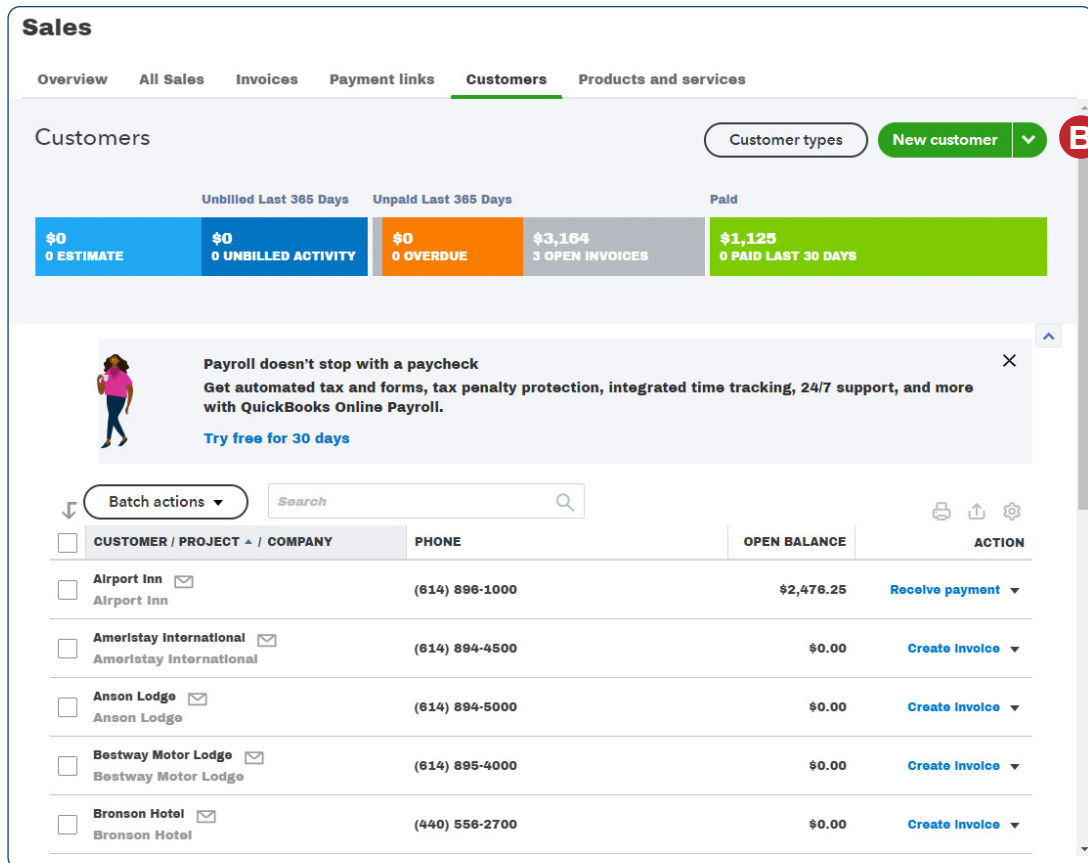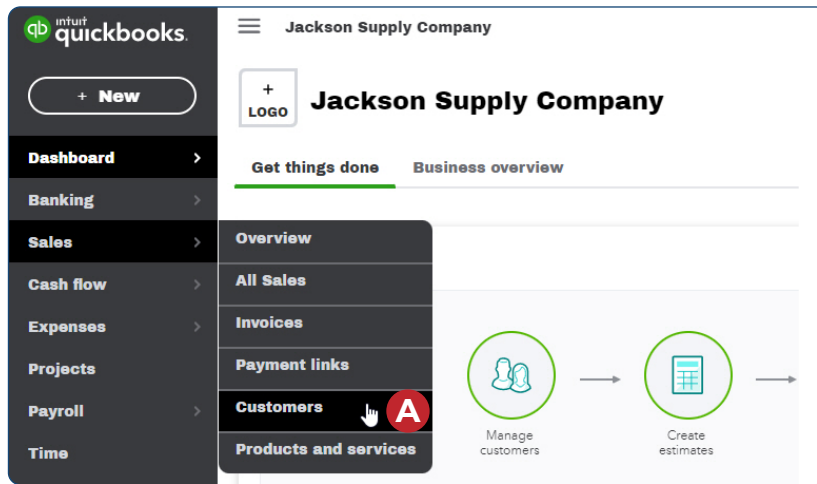| Step	Box or Other Location	Procedure
A	*QBO* **Navigation Bar**	Click **Sales → Customers** to open the customer listing.
B	**New Customer button**	Click the **New Customer button** in the customer listing to open the **Customer window**.
C	**Company name***	Type the customer's name.
D	**Email, Phone, Mobile, Fax, Other, and Website, etc. 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

Add a Customer Record
QBO windows *(continued)*

Customer Window - Name and contact section

Customer Window - Addresses section

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 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
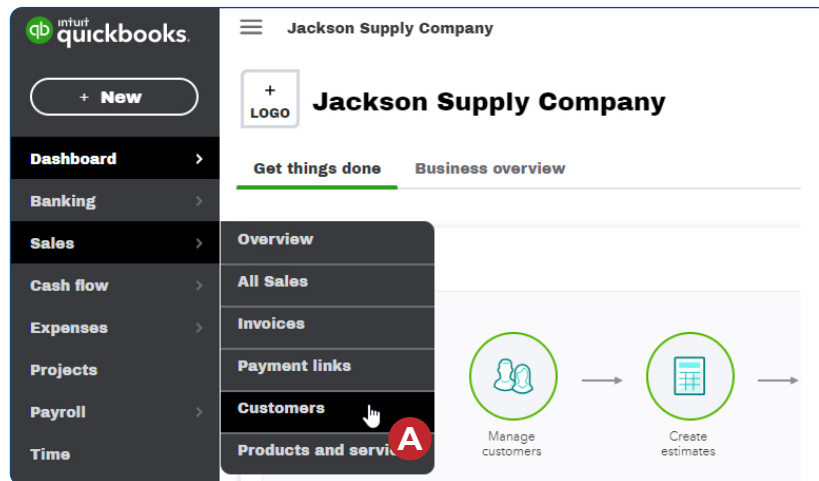
Change Information in an Existing Customer's Record
QBO windows *(continued)*

Sales

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

Customers

[Customer types] [**New customer** ⌄]

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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[Batch actions ⌄]   Search 🔍

CUSTOMER / PROJECT ▲ / COMPANY	PHONE	OPEN BALANCE	ACTION
Airport Inn ✉ Airport Inn	(614) 896-1000	$2,476.25	Receive payment ⌄
Ameristay International ✉ Ameristay International	(614) 894-4500	$0.00	Create Invoice ⌄
Anson Lodge ✉ **Ⓑ** Anson Lodge	(614) 894-5000	$0.00	Create Invoice ⌄
Bestway Motor Lodge ✉	(614) 895-4000	$0.00	Create Invoice ⌄

nerdetail?nameId=11

Anson Lodge ✉ ☎
Anson Lodge   8777 Vine, Columbus, OH 43216

Add notes

[Edit] [**New transaction** ⌄]

$0.00 OPEN
$0.00 OVERDUE

Transaction List   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)*

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

Company name

Customer display name *

Email

Phone number

Mobile number

Fax

Other

Website

Name to print on checks

☐ 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**.
C	**QBO message**	A message will appear that says "Are you sure you want to make [customer name] inactive?" Click the **Yes/Yes, make inactive button**.

Make a Customer's Record Inactive
QBO windows

Make a Customer's Record Inactive
QBO windows *(continued)*

May say Cancel → No

Yes ← May say Yes, make inactive