

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.

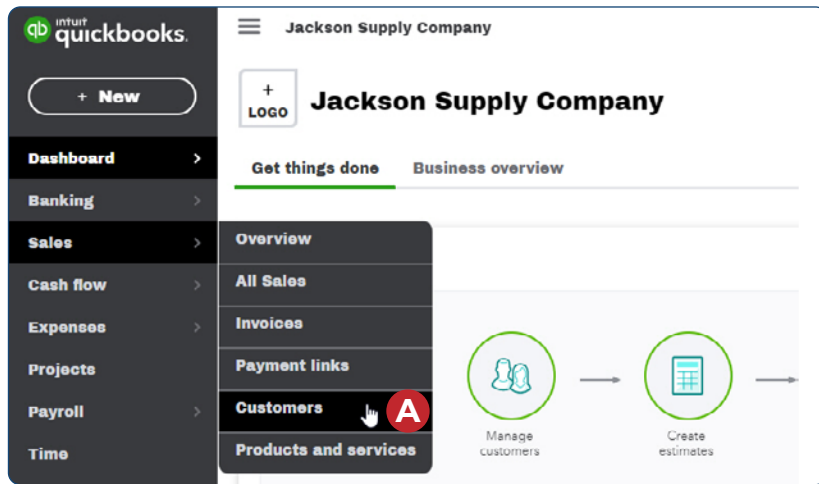
** Payments section.

*** Additional info section.



Add a Customer Record

QBO windows



Sales

Overview All sales Invoices Estimates Payment links **Customers** Products & services

Customers Customer types New customer B

\$0 0 estimates **\$0** Unbilled income **\$0** 0 overdue invoices **\$0** 0 open invoices and credits **\$0** 0 recently paid

Search

<input type="checkbox"/>	NAME ↑	COMPANY NAME ↓	PHONE	OPEN BALANCE ↓	ACTION
<input type="checkbox"/>	Airport Inn		(614) 896-1000	\$0.00	Create invoice
<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
<input type="checkbox"/>	Cash Customer			\$0.00	Create invoice
<input type="checkbox"/>	Comstock Inn Bed & Breakfast		(513) 524-7800	\$0.00	Create invoice
<input type="checkbox"/>	Greenleaf Suites		(440) 554-5678	\$0.00	Create invoice



Add a Customer Record

QBO windows (continued)

Customer Window - Name and contact section

K

Customer [Close]

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 **C** Customer display name *

Email Phone number

Mobile number Fax

Other Website

Name to print on checks

Is a sub-customer

D

Customer Window - Addresses section

K

Addresses

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

Same as billing address **E**

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 📅
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Privacy

Save **L**

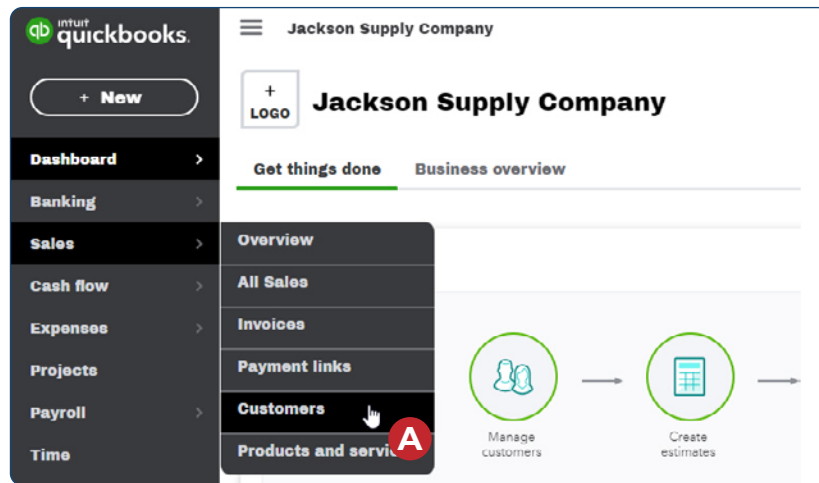


Change Information in an Existing Customer's Record – Quick Reference Table

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 Estimates Payment links **Customers** Products & services

Customers Customer types New customer

\$0 0 estimates **\$0** Unbilled income **\$0** 0 overdue invoices **\$0** 0 open invoices and credits **\$0** 0 recently paid

NAME ↑	COMPANY NAME ↓	PHONE	OPEN BALANCE ↓	ACTION
<input type="checkbox"/>	Airport Inn	(614) 896-1000	\$0.00	Create invoice ↓
<input type="checkbox"/>	Ameristay International	(614) 894-4500	\$0.00	Create invoice ↓
<input type="checkbox"/>	Anson Lodge B	(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 ↓
<input type="checkbox"/>	Cash Customer		\$0.00	Create invoice ↓
<input type="checkbox"/>	Comstock Inn Bed & Breakfast	(513) 524-7800	\$0.00	Create invoice ↓
<input type="checkbox"/>	Greenleaf Suites	(440) 554-5678	\$0.00	Create invoice ↓

Anson Lodge Edit New transaction

Company - Billing address 8777 Vine, Columbus, OH 43216, United States

Notes [Add notes](#)

\$0.00 Open balance

\$0.00 Overdue payment

C*

Transaction List Statements Recurring Transactions Projects Customer Details Late Fees

Create and send invoices—then get paid

- Give customers the option to pay right from the invoice
- Customize invoices with your logo, colors, and fonts
- Get paid faster using automatic reminders

[Create invoice](#)

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



Change Information in an Existing Customer's Record

QBO windows (continued)

D Edit ▼ New transaction ▼

Anson Lodge

Company - Billing address
8777 Vine, Columbus, OH 43216, United States

Notes
[Add notes](#)

SUMMARY

\$0.00
Open balance

\$0.00
Overdue payment

Transaction List Statements Recurring Transactions Projects Customer Details Late Fees

Contact info

Customer	Anson Lodge
Email	SteveU@AnsonLodge.com
Phone	(614) 894-5000
Mobile	-
Fax	(614) 894-5055
Other	-
Website	http://www.AnsonLodge.com
Notes	-

Attachments

Additional info

Billing address	8777 Vine, Columbus, OH 43216, United States
Shipping address	8777 Vine, Columbus, OH 43216, United States
Terms	-
Credit Limit	-
Payment method	-
Preferred delivery method	Print
Customer type	Retail Trade
Customer	-

See next page for additional window

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Reference – Sales and Cash Receipts Cycle Activities:
Customer Maintenance

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 *

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

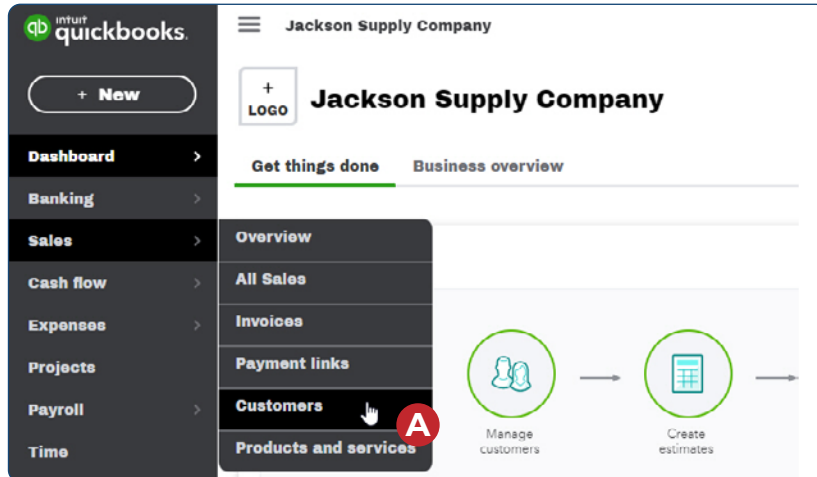


Make a Customer's Record Inactive – Quick Reference Table

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)

Sales

Overview All sales Invoices Estimates Payment links **Customers** Products & services

Customers Customer types New customer

\$0.00 0 estimates
\$0.00 Unbilled income
\$0.00 0 overdue invoices
\$0.00 0 open invoices and credits
\$0.00 0 recently paid

NAME	COMPANY NAME	PHONE	OPEN BALANCE	ACTION
<input type="checkbox"/>	Airport Inn	(614) 896-1000	\$0.00	Create invoice
<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 sales receipt Create estimate Send payment link Create charge Create time activity Create statement Make inactive
<input type="checkbox"/>	Bronson Hotel	(440) 556-2700	\$0.00	
<input type="checkbox"/>	Cash Customer		\$0.00	
<input type="checkbox"/>	Comstock Inn Bed & Breakfast	(513) 524-7800	\$0.00	
<input type="checkbox"/>	Greenleaf Suites	(440) 554-5678	\$0.00	
<input type="checkbox"/>	McCarthy's Bed & Breakfast	(614) 894-4012	\$0.00	

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

May say Cancel → **No** **Yes** → May say Yes, make inactive **C**

