

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	+ Create → Add customer to open the customer listing.
B	Company name*	Type the customer's name.
C	Email, Phone, Mobile, Fax, Other, and Website, etc. boxes*	Type the customer's various contact and website information, to the extent available.
D	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.
E	Primary payment method**	If the customer has a primary method of payment (check, ACH, credit), select the method.
F	Terms**	Select the default payment terms for the customer.
G	Customer type***	Select the customer type, if applicable.
H	Opening balance***	Type the customer's opening balance, even if it is 0
I	As of***	Select the date of the opening balance for the customer.
J	Customer window (all sections)	Review the information in all sections of the Customer window to verify that it is correct.
K	Save button	Save the new customer record and close the window.

* Name and contact section.

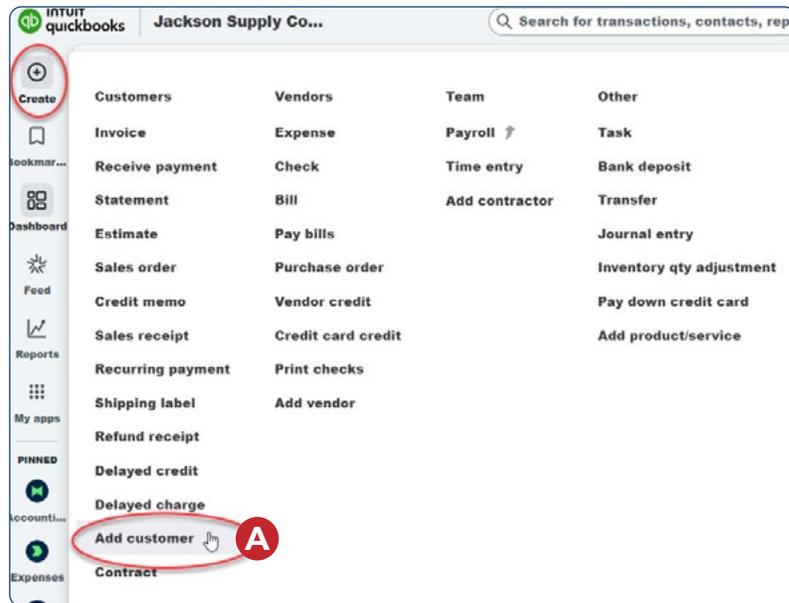
** Payments section.

*** Additional info section.



Add a Customer Record

QBO windows



Customer Window - Name and contact section

The screenshot shows the 'Customer' window with the 'Name and contact' section expanded. The window title is 'Customer'. The section is labeled 'Name and contact'. The fields are:

- Title
- First name
- Middle name
- Last name
- Suffix
- Company name (labeled with a red 'B')
- Customer display name *
- Email
- Phone number
- Mobile number
- Fax
- Other
- Website
- Name to print on checks
- Is a sub-customer (checkbox)

A red 'J' is in the top left corner. A red 'C' is on the right side of the form, indicating the contact information section.

Add a Customer Record

QBO windows (continued)

Customer Window - Addresses section

J **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

D Same as billing address

D

Customer Window - Payments section

J **Payments**

Primary payment method	Terms
E <input type="text" value="Select a primary payment ..."/>	F <input type="text"/>
Sales form delivery options	Language to use when you send invoices
<input type="text"/>	<input type="text" value="English"/>
Credit Limit	
<input type="text"/>	

Add a Customer Record

QBO windows (continued)

Customer Window - Additional info section

J

Additional info 

Customer type
 G 

Taxes

Exemption details

Opening balance 

Opening balance **H** **As of** **I** 

[Privacy](#)

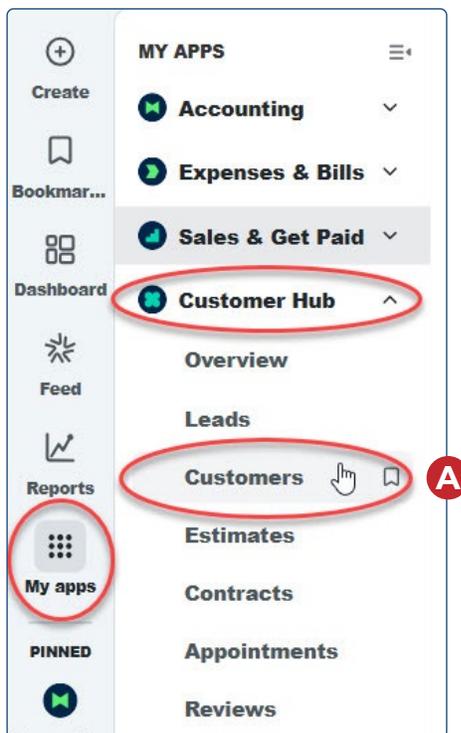
Save **K**

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

Step	Box or Other Location	Procedure
A	My Apps menu	Click Customer Hub → 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	If the Customer Details tab is not the default open 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)

Customers [Check out the new view with filters](#) Customer types New customer

\$0 0 estimates
 \$0 Unbilled income
 \$0 0 overdue invoices
 \$9,825 2 open invoices and credits
 \$0 0 recently paid

If you're managing sub-customers as projects, convert the ones without any children into standalone projects. [Convert now](#)

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	\$9,825.00	Receive payment
<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
<input type="checkbox"/>	McCarthy's Bed & Breakfast		(614) 894-4012	\$0.00	Create invoice

AL

Anson Lodge

Add company name

Email: SteveU@AnsonLodge.com

Phone: (614) 894-5000

Billing address: 8777 Vine, Columbus, O...

Shipping address (same as billing address): 8777 Vine, Columbus, O...

Notes: Add notes

Custom Fields:

Financial summary

- Open balance: **\$0.00**
- Overdue payment: **\$0.00**

[Transaction List](#)
 [Activity Feed](#) NEW
 [Statements](#)
 [Recurring Transactions](#)
 [Projects](#)
 [Customer Details](#) C*

Batch actions

Type: All plus depo...

Status: All

Date: All

[View Recurring Templates](#)

[Feedback](#)

<input type="checkbox"/>	DATE	TYPE	NO.	CUSTOMER	MEMO	AMOUNT	STATUS	ACTION
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*Note: See next page for Customer Details tab contents.



Change Information in an Existing Customer's Record

QBO windows (continued)

< Customers
Give feedback D Edit New transaction



Anson Lodge
Add company name

Email
SteveU@AnsonLodge.com

Billing address
8777 Vine, Columbus, OH 43216, ...

Notes
[Add notes](#)

Phone
(614) 894-5000

Shipping address (same as billing address)
8777 Vine, Columbus, OH 43216, ...

Custom Fields

Financial summary

- **Open balance**
\$0.00
- **Overdue payment**
\$0.00

Transaction List Activity Feed NEW Statements Recurring Transactions Projects Customer Details Late Fees Notes NEW

Contact info

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

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 language	-
Tax exemption details	-

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"/>				

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

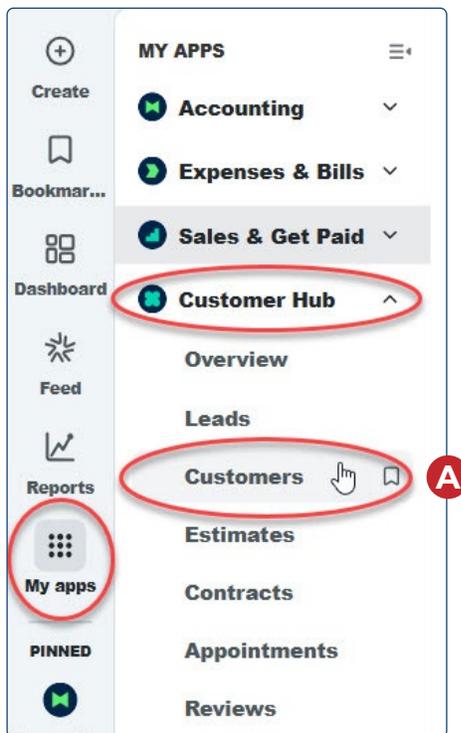
Save F



Make a Customer's Record Inactive – Quick Reference Table

Step	Box or Other Location	Procedure
A	My apps menu	Click Customer Hub → 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-out 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, make inactive button .

Make a Customer's Record Inactive QBO windows



Make a Customer's Record Inactive

QBO windows (continued)

Customers [Check out the new view with filters](#) Customer types New customer

\$0 0 estimates **\$0** Unbilled income **\$0** 0 overdue invoices **\$9,825** 2 open invoices and credits **\$0** 0 recently paid

! If you're managing sub-customers as projects, convert the ones without any children into standalone projects. [Convert now](#)

Search

<input type="checkbox"/>	NAME ↑	COMPANY NAME ◯	PHONE	OPEN BALANCE ◯	
<input type="checkbox"/>	Airport Inn		(614) 896-1000	\$0.0	
<input type="checkbox"/>	Ameristay International		(614) 894-4500	\$9,825.0	
<input type="checkbox"/>	Anson Lodge		(614) 894-5000	\$0.0	
<input type="checkbox"/>	Bestway Motor Lodge		(614) 895-4000	\$0.0	
<input type="checkbox"/>	Bronson Hotel		(440) 556-2700	\$0.0	
<input type="checkbox"/>	Cash Customer			\$0.0	
<input type="checkbox"/>	Comstock Inn Bed & Breakfast		(513) 524-7800	\$0.0	
<input type="checkbox"/>	Greenleaf Suites		(440) 554-5678	\$0.0	
<input type="checkbox"/>	McCarthy's Bed & Breakfast		(614) 894-4012	\$0.00	Create invoice
<input type="checkbox"/>	Oaklawn Hotel		(440) 567-8720	\$0.00	Create invoice

- Create sales receipt
- Create estimate
- Send payment link
- Create charge
- Create time activity
- Create statement
- Create task
- Make inactive** **B**
- Request feedback
- Create contract
- Schedule appointment

!

Are you sure you want to make McCarthy's Bed & Breakfast inactive?

C

